Next-Gen ADM Services

Archetype Report

A research report aligning enterprise requirements and provider capabilities

February 2020
About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of October 2019. 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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ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals, as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

Next-Generation ADM Services

ISG sees that client enterprises’ need for application development and maintenance (ADM) capabilities is changing and growing. Clients want to better leverage their software (and other IT) to improve business operations and efficiencies, develop competitive advantage, and even create entirely new ways of doing business and new markets. Unfortunately, many of the capabilities that enable this digital transformation also frustrate clients’ abilities to transform.

The combination of traditional business software (and associated skills, methodologies and tools) with advanced cloud-based software and services results in massive software complexity that requires new approaches with better technologies, skills and tools. Enterprises’ IT organizations and business leaders are becoming more aware that their increasingly complex software environments call for standardization, modernization and management beyond their own capabilities.

As a result, the ADM space is morphing into large-scale digital transformation projects, engagements that focus on packaged technology solutions with a growing focus on SaaS-based offerings and managed application services contracts. This in turn drives what ISG calls “next-generation ADM.”

Like traditional application development and maintenance services, next-gen ADM includes consulting, design, custom development, packaged software integration, operations and testing. However, as the digital initiatives of client enterprises accelerate, next-gen ADM also needs to leverage automation, AI, new methodologies and a more expansive managed services approach. And the scope, delivery mechanisms and outcomes for client engagements increasingly build on value-based approaches where the focus is on achieving enterprise agility and solving business problems.

This report assesses service providers based on their capabilities 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.
These new approaches vary, but most providers tend to follow similar paths. For example, most have branched into areas such as analytics, IoT, cloud-native architectures, SaaS-based offerings, security, customer experience (CX), user experience (UX) and mobile apps. And most are refocusing their next-gen development activities on solving clients’ business problems, improving profits or revenue, or enhancing brand value, rather than acting as a support mechanism for running IT operations.

Meanwhile, next-gen maintenance activities (by clients and by providers) are increasingly focused on finding different avenues to achieve cost savings by using technologies like intelligent automation. Such efforts can reduce the cost of maintenance activities by 20 to 30 percent, thereby allowing enterprises to invest in greater improvement.

We see client enterprises driving these market changes, adopting and integrating next-gen ADM technologies. Enterprise-wide adoption of concepts such as DevOps is providing many benefits, such as: helping clients achieve agility and coordination among development, testing and production functions; developing cultures where application updates are shaped by user feedback; eliminating software silos and realizing maximum value throughout application lifecycles; and bridging the efficiency voids across business processes.

Key market influences that we see shaping and reshaping the next-gen ADM marketplace include the following:

- **Hybrid cloud environments become the norm.** Just a few years ago, market influencers were still debating “cloud vs. on-premises” deployment and management of business software. And if or when cloud was selected, the typical assumption was that enterprises would select one method for acquiring and using software and only one cloud provider. The reality is much more complex now, with multiple on-prem and cloud instances of many business software applications delivered via multiple cloud services providers.
  - **Agile methodology increasingly includes AI and automation.** Expanding uses of AI, typically beginning with bots and robotic process automation (RPA), are pushing agile approaches and teams to new levels of adaptability, flexibility and speed. This reduces needs for direct human involvement throughout many aspects of coding, testing, and management.
  - **Agile also must be fast, global and integrative.** Rapid application development and delivery continues to grow in use and importance to client enterprises. As they digitally transform, their business, engineering, and operations organizations increasingly demand rapid development cycles. Developers must be able to quickly add features and release new software. Service providers that can offer cost-effective, globally distributed agile development and delivery are in demand.
  - **Agility and automation are transferring into the maintenance aspect of ADM.** We see some of this occurring in enterprises and even more so among next-gen ADM service providers. Adaptive AI such as machine learning enables greater spans of applications management, especially as-a-service. Overall, more ADM is occurring with less human intervention and — assuming proper process automation — less error.
Business outcomes are key. Metrics based on client business improvement are often used to measure results of provider engagements. As a result, contracting structures and preferences are shifting from traditional, input-based transactional models to models dependent on business-based metrics.

Testing automation is becoming a must-have. Clients want effective and accurate testing that can keep up with their agile release needs. And, of course, they want this testing to be more cost-effective. Providers in turn need to be able to deliver rapid and repeated testing across multiple types of client environments.

Centers of excellence feel pressure to adapt. Traditional service provider CoEs focus on specific sets of technologies, applications and vendors, which are valuable to clients and providers alike. Meanwhile, the advent of digital transformation is beginning to affect how provider CoEs are shaped and operated. We see interest from clients in CoEs that are less siloed and more integrative across business operations.

Domain and vertical integration are critical. Testing services are increasingly being adapted with industry-specific tools, reusable (but adaptable) scripts and accelerators. Service providers are creating vertically mapped solutions for testing clients. Services that are now being mapped most often are test consulting, application testing, application security testing, enterprise solution testing and IoT testing.

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

Demand increases for full-stack testing engineers. The desire to achieve continuous testing capability has led to greater demand for full-stack testing engineers. They 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 test environments in public cloud and virtual environments.
Introduction

Next-Gen Digital Requires Next-Gen ADM

As the business requirements of client enterprises shift to include more digitally enabled and digital-centric operational and competitive requirements, their needs for ADM-related services grow and change rapidly.

But as clients' business software needs grow, they also change – and we see them changing quite rapidly. They seek increased agility, more hybrid environments, and improved technologies, tools, and techniques. As a result, the ADM services and capabilities that service providers bring to market must change just as rapidly.

This report assesses service providers based on their capability to augment or even replace traditional ADM services using advanced and emerging technologies and methodologies, like agile, DevOps, automation, and modernization techniques to satisfy clients' next-generation ADM requirements. It also assesses provider capabilities in incorporating new approaches to developing and delivering applications that focus on business outcomes.
About This Research

This ISG Provider Lens™ report summarizes the relative capabilities of 25 service providers and their abilities to address the requirements of three typical, frequently encountered categories of enterprise buyers (“archetypes”). Each archetype represents a unique set of business and technological needs and challenges. Our research found no shortage of providers capable of satisfying next-generation ADM needs across most user archetypes. This is due in large part to two core realities regarding the archetypes:

1. The characteristics of each archetype are moving targets because, while the core requirements rarely change, the relative importance of different requirements can vary based on business and technological environment changes.

2. Most enterprises, especially larger firms, tend to include multiple archetypes. As each archetype’s requirements evolve based on business and technological changes, so too does the presence and value of each archetype within the enterprise. Therefore, enterprises have an ongoing series of choices when it comes to contact center services provider selection. They will need to strike a balance between optimal business value and relative cost of the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables will continually add to and subtract from user needs.

This report uses research and analysis from ISG’s long-running work with enterprise clients and business process outsourcing services providers to identify and examine key changes in, approaches for and buyers of Digital Business Solutions and Services. We map the user-side requirements to provider-side offerings and capabilities. Not every user enterprise has the same requirements. In this report, we use four buyer archetypes – detailed in the following sections – to identify and assess buy-side requirements for business value relative to provider-side offerings and capabilities. All revenue references are in U.S. dollars ($US) unless noted.

We have developed and refined the assessment methodology over several years of working with buyers to understand and articulate their services requirements and from working with service providers to understand how those buyer requirements influence the development of suitable solutions and go-to-market strategies.

Some service providers that are typically included in our work are not included among the 25 providers assessed in this report because they were unable to or declined to participate. They may be included in future versions of this report, based on merit and on the firms’ willingness to provide current and relevant materials. Readers should not make any inferences based on a service provider’s absence from this report.
How to Use This Report

This report is intended to provide advice founded on ISG's experienced-based, proprietary assessment of services providers' relative suitability to the needs of the typical Digital Business Solutions and Services customer. This advice is then applied across each of the four archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs, but also on other factors such as cost, culture and timing.

This report is organized as follows:

Client archetype description: This section identifies and describes the most common user-side archetypes that we have identified in our ongoing research and analysis.

Assessments by archetype: These sections first detail each of the client archetypes, along with the types of service offerings that each typically requires to realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the services providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided to ISG. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.

Methodology: In this section, we outline and explain how we developed and applied the data, analysis and insights provided in this report.

Please note: This report presents services providers' known capabilities in the context of user enterprises' typical project needs (which are categorized as specific archetypes). This report is not meant to rank providers or to assert that there is one top provider with capabilities that can meet the requirements of all clients that identify themselves as a particular archetype.
CLIENT ARCHETYPE DESCRIPTIONS

Client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients ISG has observed and how we classify them according to their relative outsourcing maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is looking to outsource one or more processes or functions. The use of archetypes enables us to develop sets of characteristics and needs that can be applied uniformly and repeatedly across multiple environments, industries, provider types and other variables within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which a similarly simple, relevant set of provider capabilities can be assessed.

The archetypes included in our reports are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed (and refined over time) based on our advisory and consulting work with enterprise clients and IT service providers, and on our global business IT market research and advisory programs.
DIGITAL TRANSFORMATION

In this buying scenario, clients seek competitive advantage through innovative use of established and advanced technologies. Rapid development and IT adaptation are key. Revenue improvement tends to drive this approach. Because the outcome of such engagements has direct impact on a client's business, we see increasing client desire for outcome-based pricing, where the service provider’s fee is directly linked with specified IT or business outcomes.

LEVERAGING PACKAGED SOFTWARE PLATFORMS

In this buying scenario, clients pursue standardized, consolidated and simplified enterprise software applications and associated services. This may involve integrating with external platforms like SAP HANA and Oracle, or building one’s own platforms. In recent years, we see more and more use of — and integration with — SaaS-based applications in this space. Providers with experience in third-party automation tools are gaining traction with clients.
MANAGED SERVICES

Clients in this buying scenario seek to achieve IT maturity in terms of resource utilization, operational processes and business practices by handing over ADM services portfolios to one or more service providers. The service provider(s) ensures application reliability and availability as well as associated management. Most engagements follow a fixed-fee or application-based pricing approach, requiring service scope to be well defined. Automation is increasingly used by providers to bring down costs.
Next-Gen ADM Services
Archetypes
Digital business means optimizing data use everywhere. For enterprise clients, the digital transformation needed to achieve this builds on adoption, adaptation and integration of advanced technologies, operations and business processes. Agile development capabilities are core client needs, with continuous testing to ensure availability and adaptability. We also see clients requesting or requiring providers to have dedicated digital business/transformation units that are able to deliver critical capabilities through the use and adaptation of custom blends of established and emerging technologies. Service providers’ vision and investment in what’s next is key to clients’ understanding of their abilities to meet client next-gen needs.
Digital Transformation - Client Objectives

- Increase — and create — revenues through IT
- Business-centric solutions with the goal of seamless touchpoint experiences
- Enterprise agility in IT and in business
- Optimize usage of established and emerging technologies
- Link IT outcomes to business metrics

Digital Transformation - Influence of Provider Capabilities

- Increase in future influence
- Decrease in future influence

Size based on relative current importance in the archetype profile
Of the 25 service providers included in our research, we found 10 that stand out above the others as matching the digital transformation archetype based on our assessment of their capabilities as described in the methodology section in the appendix. These 10, referred to as archetype leaders, and their relevant capabilities are presented in Figure 2, and they are briefly examined in the following section.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

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Mindtree

In agile development, Mindtree reports over 5,400 engineers, 35 coaches, 435 scrum masters and 225 architects. Approximately 90 percent of projects report a release cycle of one to two weeks. About 65 percent of staff are trained in Scrum, 15 percent in SAFe, and 10 percent in Kanban. XP and others are also used.

More than 2,200 continuous testing staff support clients via eight delivery centers worldwide. Performance/load, smoke and regression testing are utilized in more than 90 percent of engagements; unit, system, compliance and user acceptance testing are each also used at least half the time.

Mindtree’s dedicated digital business unit supports more than 100 clients across cloud, automation, mobility and AI. Its data analytics platform, supported by data science and IoT CoEs, applies continuous learning algorithms to analyze complex client data pools. And Mindtree’s CAPE meta-platform enables composable and low-code integration and delivery of key IT, augmenting its Integrated Services transformation strategy.

Moving forward, the company’s Digital Pumpkin innovation platform helps clients develop and refine innovative digital solutions, accelerators, and tools. Mindtree also operates a co-innovation lab in Silicon Valley to explore and improve IoT, sensor analytics and AI, and partners with academic institutions and design and engineering firms to advance digital transformation.
OTHER NOTEWORTHY PLAYERS – DIGITAL TRANSFORMATION ARCHETYPE

Some other providers scored high in or more areas that are important for the digital transformation client. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for digital transformation clients are:

- Agile Development
  - Accenture
  - Hexaware
  - TCS
  - Tech Mahindra
  - UST Global

- Continuous Testing
  - Hexaware
  - NTT DATA
  - TCS
  - UST Global

- Digital Business Dedication
  - Accenture
  - ITC Infotech
  - Tech Mahindra
  - UST Global

- Vision & Future Investment
  - Mphasis
In this buying scenario, clients seek more standardized, consolidated and interoperative enterprise software applications. Clients want to be able to optimize data and utilize it more readily and reliably in and across core business application platforms and solutions. Given the accelerating adoption and expanding adaptation of more diverse technologies applied to more aspects of enterprise business, what clients today require from providers is shifting toward a new blend of technologies, skills and offerings. Key client needs that we see in this scenario now include the following: enterprise software strengths; expertise in implementing and managing enterprise resource planning (ERP) and business process management (BPM); DevOps skills in building and improving interoperability (along with data security capabilities); testing automation for ongoing monitoring, measurement and improvement; and overall technology abilities to benefit from an ever-growing array of on-premises and cloud-based resources and services.
Leveraging Packaged Software Platforms - Client Objectives

- Optimize the value of established and emerging solutions and platforms
- Improve and share business process expertise through standardization of business software
- Better leverage both on-premises and SaaS-based packaged software and functionality
- Leverage business software into improved business operations
- Rely on providers to optimize enterprise business software with future business
Of the 25 service providers included in our research, we found eight that stand out above the others as matching clients’ leveraging packaged software platforms requirements based on our assessment of their capabilities as described in the methodology section in the appendix. These eight, referred to as archetype leaders, and their relevant capabilities are presented in Figure 5, and they are briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.
Some other providers scored high in or more areas that are important for the leveraging packaged software platforms client. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for leveraging packaged software platforms clients are:

**Other Noteworthy Players – Leveraging Packaged Software Platforms Archetype**

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<th>Enterprise Software Strengths</th>
<th>ERP &amp; BPM Strengths</th>
<th>DevOps Strengths</th>
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Clients in this buying scenario seek standardized IT maturity in terms of resource utilization, operational processes and business practices by handing over ADM services portfolios to one or more service providers. Typically, these clients have business software portfolios with anywhere from dozens to thousands of applications. Most large client software landscapes include portfolios with semi-customized core business software platforms (including SAP, Oracle), along with a substantial variety of custom software developed in-house and with third parties. Most engagements follow a fixed-fee or application-based pricing approach, requiring service scope to be well-defined. Automation is increasingly important to manage operational costs, reduce problems and enable improved incident management. As a result, providers need to have broad, deep, enterprise-scale, software portfolio takeover and management experience; well-provisioned and adaptable managed services, and expertise and strong relationships with core business software vendors and technology ecosystems. They also need fundamental strengths in software architecture and service design, development and management.
Managed Services - Client Objectives

- Application portfolio rationalization, modernization and standardization
- Achieve or improve IT’s ability to support and improve business
- Reduce and remove overall software inefficiencies
- Strengthen IT governance

Managed Services - Influence of Provider Capabilities

- Increase in future influence
- Decrease in future influence

Size based on relative current importance in the archetype profile
Of the 25 service providers included in our research, we found 10 that stand out above the others as matching clients’ managed services criteria based on our assessment of their capabilities as described in the methodology section in the appendix. These 10, referred to as archetype leaders, and their relevant capabilities are presented in Figure 8, and they are briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.
OTHER NOTEWORTHY PLAYERS – MANAGED SERVICES ARCHETYPE

Some other providers scored high in or more areas that are important for the managed services client. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for managed services clients are:

**Portfolio Competencies**
- EPAM
- LTI

**Delivery & Managed Services**
- Birlasoft
- Hexaware
- ITC Infotech
- LTI
- Mindtree
- NTT DATA
- Tech Mahindra
- Zensar

**Portfolio & Provider Management**
- Mindtree

**Architecture/Service Design + Management**

Fig 9: Other Noteworthy Players – Managed Services Archetype
## Service Providers Across Archetypes

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★ = Leaders  
✓ = Noteworthy Providers (number of check marks indicate the degree of alignment with the capability requirements of each client archetype)  
□ = Not In (the Service Provider wasn’t considered a leader in any of the capability requirements for this archetype)

**NOTE:** All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers.
### SERVICE PROVIDERS ACROSS ARCHETYPES

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**NOTE:** All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers.
GUIDANCE

Like traditional application services, next-generation ADM services include consulting, design, custom development, packaged software integration, DevOps, agile, operations, security (including application security, governance and other related areas) and testing.

But like the next-gen enterprise business that it enables, next-gen ADM continues to shift and grow rapidly. As change agents such as automation, AI and API-enabled interoperability become both more available, they become more important to enterprise business software use and management. That indicates a growing need for assistance from ADM service providers through the next several years.

Key changes through at least 2022 include an increasing need for more agile and adaptive skills, technologies and approaches to building and improving enterprise software, with simultaneous and congruent modernization and homologation of business software, platforms and portfolios. These complexities in turn will foster a growing need for ever-improving automation, including the use of AI in all aspects of ADM.
Enterprise Leadership Actions

1. The “bi-modal trap” continues to threaten enterprise ADM vision and success. A bi-modal environment, in most cases, should be considered an interim measure to reach a final solution — for example, digital dominance throughout enterprise business and IT. But any enterprise-class IT environment moves at multiple speeds that may vary at any time. Fostering a two-speed environment of IT/software development and change management threatens more progress than it enables.

2. Press for business-outcome-related project goals and engagement pricing. Plan, scope and manage initiatives and provider relationships with significant, measurable business improvements in mind.

3. Embrace automation in ADM, because it can drastically improve overall agility and reduce time, errors and cost. But require it only where its benefits are already demonstrated in cases similar to your own, and where the provider has proven itself.

4. The development and maintenance of digital-era enterprise software environments — not only applications, but platforms, cloud-based services and everything else intertwining with these — will increasingly require more integrative services. Plan next-gen ADM to enable agility while normalizing key software technologies, interfaces and data sharing.

5. A future including significant reliance on software as a service will usually drive the enterprise toward more ADM-as-a-service solutions in different forms. Multiple archetypes will be present at different times. Successful, efficient enterprise IT management will leverage multiple archetypes.
Provider Leadership Actions

1. Improve your ability to leverage enterprise user archetypes into go-to-market approaches. Adapt your value propositions to the value requirements of critical archetypes, while keeping in mind that archetypes can adapt as user needs and IT business value shift.

2. Investigate the application and adaptation of multiple forms of AI throughout your services portfolio and methodologies, especially with an eye toward enabling and extending automation capabilities.

3. However, keep tight control over any AI-driven automation initiatives to ensure that they operate according to your strictest process and business compliance requirements. We see too many instances where ineffective, and even incorrect, processes are automated. These can be exceptionally costly.

4. Continue to partner to find and adapt advantageous technologies and methodologies. Leverage partnerships to increase awareness of technologies and skills required, and invest carefully in collaborative initiatives that boost both companies' skills and knowledge. But be aware of, and open to, new and different types of partnership models as markets, business models and company cultures shift.

5. While acquiring a company for its expertise can quickly boost your firm's overall skill sets, “buying skills” is often less efficient and more expensive than improving internal training. Mandate and support continuous skills improvement programs within and across all areas of staffing, not only CoEs.

6. Promote higher internal collaboration as well as collaboration with partners. Pursue new methods to align skill sets and project requirements with the talent available.

7. Along that line of thinking: Consider new thinking about “collaboration,” including not only with partners, but with internal groups and with crowd-sourcing providers, platforms and marketplaces. The needs for certain levels of knowledge and skills may not be permanent.
APPENDIX

Methodology
As previously noted, this report uses three archetypical sets of buy-side client requirements to assess the relative suitability of Next-gen ADM services providers. Data regarding the providers’ capabilities and positioning was provided to ISG via briefings, ISG advisor interviews and surveys of service providers, including client references if appropriate.

Next-gen ADM services providers (SPs) shared their data across different service dimensions through the research initiatives noted above. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

Report Methodology

1. Categorize and assess provider data
2. Weight Importance of capability requirement
3. Determine provider position in quartile
4. Create cumulative score
5. Categorize providers in archetypes
Methodology Details

1. The data provided by the services providers were categorized and assessed according to the Next-gen ADM services requirements described for each of the three client archetypes included. In cases in which provider descriptions and data were not worded as precisely as our archetype requirements, our Next-gen ADM services analysts relied on their expertise and experience to classify provider capabilities.

2. Each archetype capability requirement was weighted based on its relative importance to that archetype’s typical requirements. Weightings for each archetype’s requirements add up to a total of 100 percent. Specific weightings are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each archetype section using differently sized “hexagon” icons.

3. Once the relative ability of each services provider was assessed for each of the archetype requirements, each provider was then positioned in a relevant quartile (for example, top 25 percent, second 25 percent and so on). The top quartile was awarded a numerical “capability score” of 4/4; the second quartile earned a score of 3/4, the third quartile earned a score of 2/4, and the fourth quartile earned a score of 1/4. Those with no capabilities to meet the archetype requirements were not included in the assessment.

4. Provider capability scores from Step 3 were then multiplied by the weightings developed for each client archetype requirement in Step 2. The results for each provider were then totaled to develop a cumulative score for each service provider. These cumulative scores are not disclosed in this report.

5. The cumulative scores were then used to identify the services providers most well suited for each archetype’s requirements. These providers are listed alphabetically and briefly profiled in each archetype section. Where relevant, additional services providers with noteworthy capabilities are also mentioned (e.g., providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report simply presents services providers’ known capabilities in the context of user enterprises’ typical project needs. This report is not meant to rank providers or to assert that there is one top provider with abilities that meet the requirements of all clients that identify themselves with a particular archetype.
Fig 10  Provider Capability Scores as Harvey Balls

<table>
<thead>
<tr>
<th>Score</th>
<th>Harvey Ball representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score 4 out of 4</td>
<td>⬤</td>
</tr>
<tr>
<td>Score 3 out of 4</td>
<td>⬤</td>
</tr>
<tr>
<td>Score 2 out of 4</td>
<td>⬤</td>
</tr>
<tr>
<td>Score 1 out of 4</td>
<td>⬤</td>
</tr>
</tbody>
</table>

The cumulative score for each of the selected services providers against each archetype requirement is represented using Harvey Balls. For example: if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent their capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, as shown in below.
Additional Relevant Next-gen ADM services providers

The capabilities of 25 providers were assessed in this report. Some services providers that are typically included in our work are not included in this report. Some of the companies that were not included were not able to participate and others declined. Providers that do not offer a full portfolio of Next-gen ADM services have not been included in the study. They may be included in future versions of this report, based on merit and on the services providers' willingness to provide current and relevant materials. Readers should not make any inferences about a services provider's absence from this report.

<table>
<thead>
<tr>
<th>Other Relevant Service Providers</th>
<th>Headquartered Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGI Group</td>
<td>Canada</td>
</tr>
<tr>
<td>Fujitsu</td>
<td>Japan</td>
</tr>
<tr>
<td>HTC Global</td>
<td>India</td>
</tr>
<tr>
<td>Virtusa</td>
<td>U.S.A.</td>
</tr>
</tbody>
</table>
In addition to coordinating and managing the ISG Insights research team, agenda, and production, Bruce's own research and expertise focus on the changing business of IT software and services. His work for enterprise clients includes IT value and cost modeling, and business planning for new types of IT that enable new business value, especially for Finance and IT organizations. His provider client work translates the changing business value of enterprise IT into improving strategies and go-to-market efforts for IT providers, including channel and partner strategies.

Bruce has helped to coordinate and lead the development and refinement of the ISG Insights subscription research and advisory organization, working to align and integrate aspects of the exceptional range of technology, market, and client knowledge and experiences from throughout ISG into continuous business value for ISG clients.

Bruce holds an MBA in marketing and finance, a BA in the psychology and business of mass media communication, and certification in several software, networking, and engineering disciplines.
Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.
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