*ISG Provider Lens™

Next-gen Application Development & Maintenance (ADM) Services

Agile Development

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

December 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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2020 for providers who actively participated as well as for providers who did not. 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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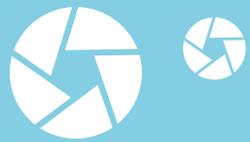
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EXECUTIVE SUMMARY

Next-gen ADM

Application development and maintenance (ADM) services continue to evolve, led by changing customer preferences and the adoption of digital technologies. Digital technologies adoption is driving the need for rich user interfaces, dynamic applications, responsive features and speedy updates and releases. The portfolio of available next-generation ADM services can transform and streamline the application estates of enterprise clients to meet these dynamic customer requirements.

At an overall level, ADM services have primarily focused on three areas for clients – portfolio optimization, modernization and enablement of the digital transformation journey – while application maintenance has focused on reducing their maintenance footprint. A proactive and predictive approach for application maintenance services has been gaining momentum and is fueled by the need for greater visibility on KPIs and metrics. This has led to use of cognitive technologies, bots, robotic process automation (RPA), artificial intelligence (AI) and machine learning (ML) throughout the ADM lifecycle. Using these technologies helps to simplify and minimize coding efforts, leading to a faster application development release. These technologies also help in error detection, code refactoring, interpreting business rules (often written in arcane coding languages) and bug fixes. IT service providers are also looking to increase their presence to offer more of a full stack. In the U.S., we observed service providers taking a vertical industry-specific strategy for digital transformation and DevOps.

The COVID-19 pandemic led to developments on various fronts in ADM services. Enterprise service providers quickly regrouped to ensure business continuity, resilience, cost optimization and security in their services. Against this backdrop, remote working, mobile connectivity, security mechanisms in IT infrastructure and virtual collaboration through communication tools for employees came to the fore to ensure uninterrupted services for clients. ADM practices adapted swiftly to the changed reality. This adaptation was reflected in several areas, including agility and the mode of its delivery. There was increased use of collaboration tools to achieve scale, productivity and tighter integration with best practices such as offshore, distributed Agile capabilities. A few service providers also extended their capabilities by coming up with solutions and services to remotely serve client needs in supply chain and logistics.

The use of automation in ADM, along with development of proprietary tools, intellectual property (IP), frameworks and methodologies, continues to grow across IT service providers. They remain focused on creating virtual learning and knowledge-based vehicles to train employees on various technical areas and increase their certifications base to be business ready. The focus on cloud-native applications and their adoption has led to APIs, microservices architecture and low-code development slowly becoming norms. Security has found tighter integration, both in terms of protecting intellectual property and of applicability in the testing value chain across areas such as nonfunctional tests.

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Application Maintenance Services – Midmarket / Niche

Services offered within application maintenance services (AMS) can be broadly categorized into the areas of run and build. The services in these two areas broadly comprise application operations, support, maintenance, enhancements, change management and process improvement. Operational services, functional enhancements, data support, assessments, security, reporting and dashboarding are some of the other AMS service areas that service providers offer. Enterprise clients' AMS needs include reducing their maintenance cost footprint, increasing the transparency of business outcomes through automation, improving stability, gaining AMS templates, enabling knowledge transfer and acquiring tools and checklists. Service providers offer support and maintenance services for both legacy and greenfield applications. Some of the common and key services that providers offer in their AMS portfolios include 24x7 support, incident management, problem management, monitoring and other support.

Frameworks such as IT Information Library (ITIL) are being leveraged to achieve services standardization to establish reliability and accountability in AMS. Enterprise clients look forward to robust and cost-optimized services spanning multiple geographies and time zones, supported by a skilled workforce for various software portfolios for customer applications, business applications and domain-specific software (e.g. SAP, Peoplesoft and others). Most service providers have a dedicated proprietary AMS solution to serve both production support and application enhancements. Most of these services are directed to ensure application availability and stability. Service providers are using proprietary assets composed of tools and IP to leverage the benefits of AI in AMS. The use of AI helps in providing insights on business processes, metrics and asset maintenance.

Zero maintenance is emerging as the next level of progression in AMS. With this in perspective, providers are taking various routes that include developing an exhaustive understanding of the application landscape, detailed documentation and excellence in operations. Chatbots, tools and AI are being used in transition, task automation, IT service management (ITSM), cost optimization and ticket management tasks to enhance productivity for clients. Service providers are also using AIOps, which leverages machine learning (ML), natural-language processing (NLP) and robotic process automation (RPA), for self-healing, automated provisioning, problem management and defect pre-emption.

Agile Development

Service providers are accelerating their efforts toward building an agile organization. Some of the aspects of this drive include focus on roles, collaboration, change management, tools, strategy and investments in resource enablement. Some of the areas service providers are targeting for enabling an agile workforce are skills assessment, coaching,

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leadership development and global online learning strategies. They are also emphasizing training teams and resources to embrace Agile by enabling learning through external content. From a collaboration perspective, virtual elements are being included in collaboration and team onboarding. Some of the collaboration and workspace initiatives include conducting hackathons, creating ideation platforms, Agile pods, collaborative spaces for idea brainstorming and dashboarding. With a focus on value stream mapping, training and cultural aspects, a gradual shift can be observed from a process-oriented approach to a culture-led approach.

An Agile operating model is another key element of focus of service providers to achieve scale. They are focusing on this aspect in their overall Agile strategy. An Agile playbook, which offers best practices to set up a distributed Agile model for clients across geographies, comes as an extension to this operating model. Service providers are also focusing on expanding their resources trained on Design Thinking, Scrum, Kanban, Extreme Programming (XP) and their variants to accelerate Agile maturity. They are also driving initiatives to gradually inculcate an Agile mindset across their organizations by creating customized frameworks, practices, templates, estimation guidelines and case studies. Distributed and scaled Agile has gained prominence as a delivery model. The COVID-19 pandemic has further increased the relevance of distributed and scaled Agile. Some of the measures being undertaken include carrying out inclusive Agile ceremonies across time zones and enabling seamless collaboration and communication using tools such as Microsoft Teams, Slack and others.

Providers continue to offer Agile delivery led by their proprietary frameworks and tools. They also are partnering with bodies such as Scaled Agile Framework (SAFe) and automation tool providers such as Docker, Ansible and Jenkins and getting certifications from Scrum Alliance, Scrum.org, SAFe and Disciplined Agile Delivery (DAD) to create an Agile workforce. Creating an Agile mindset across the growing resource base remain a focus, along with skills management and standardizing Agile delivery.

Continuous Testing – Large Accounts

Continuous testing is being impacted by several factors related to ADM. Some of them include resiliency, stability, security, move to hybrid cloud, automation, customer experience and modernization. Talent, especially to ensure skilled resource availability across tools, is another important area IT service providers are addressing. Continuous testing has become an integral part of the service providers' Agile and DevOps delivery mechanisms, and security is being integrated with it. Its importance can be gauged by the increasing use of shift-left and shift-right practices by IT service providers.

Some of the leading services delivered by providers as a part of their continuous testing portfolios include test planning, test environment setup, functional tests, test-driven development (TDD), behavior-driven development (BDD), performance testing, nonfunctional validation and reporting. Automation is being embedded within the continuous testing lifecycle across test case management, automation engineering services, proprietary tools and intellectual property. Service providers are also embedding automation within continuous testing to accelerate application release and enhance efficiencies by reducing and removing repeatable tasks. The roles of analytics, AI and ML have also gained

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prominence over the last year. AI is also being used in testing platforms to improve agility and predictability across various phases. Intelligence is increasingly getting embedded within the testing lifecycle in test script generation, self-healing, test automation, test data generation, test selection, diagnostics, defect diagnostics and performance prediction.

Given the multitude of tools (open-source and others) available in the testing domain, integrations and the flexibility to leverage them for clients in a timebound manner become important for service providers. While a few service providers include popular tools from other providers in their proprietary testing platform, for flexibility, clients also look for connectors and integrations for a large base of tools. So, service providers are increasing their partnerships with players in the testing tool ecosystem to pass on the benefits of a skilled and trained workforce to clients. The large volume of test data generated from these multiple tools in the continuous testing lifecycle makes improving visibility and deriving insights into areas of importance for clients. Hence, service providers are incorporating visualizations within their dashboards to infer insights onto a single pane to help correlate information and make it measurable for clients.

Continuous Testing – Midmarket And Expert Consulting

Continuous testing services are led by demand for application resiliency, stability, security, moves to hybrid cloud, automation, improved customer experience and modernization. Some of the tenets required by clients include consistent, reliable and standardized testing services along with automation to manage dynamic testing requirements. Clients

also look for a broad base of testing services that extends to mobile and other form factors. Within continuous testing, service providers are offering the use of shift-left and shift-right practices led by an Agile and DevOps model. Enterprise clients are looking for deep-seated testing expertise and a dedicated, trained workforce composed of Software Design Engineers in Test (SDETs) and quality engineers to deliver testing engagements.

Metrics measurement, governance and security are some of the salient aspects of the continuous testing services delivered by service firms. Test planning, test environment setup, functional tests, TDD, BDD, performance testing, nonfunctional validation and reporting are some of the leading services delivered by service providers as a part of their continuous testing portfolios. Analytics, AI and ML have taken more prominent roles within continuous testing over the last year. Automation is being embedded within the continuous testing lifecycle across test case management, automation engineering services, proprietary tools and intellectual property creation. AI is also being used in testing platforms to improve agility and predictability across various phases.

Given the multitude of tools (open-source and niche) available in the testing domain, preparedness and availability of a trained workforce available for client engagements in a timebound manner becomes important for service providers. While a few service providers include popular tools from other providers in their proprietary testing platform, clients also look for connectors and integrations for tools in the testing ecosystem. So, service providers are increasing their partnerships with players in the testing tool ecosystem to pass on the benefit of a trained workforce to clients. Service providers are also investing to create proprietary intellectual property and other assets. They are increasing their

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focus on training and learning initiatives by certifying resources on tools such as Selenium, UFT, SmartBear and others. Reporting and dashboarding of metrics from such tools has emerged as an important area for process improvement and business insights. Service providers leverage the data generated by these tools and create effective visualizations in their dashboards for a unified view to streamline processes in a single pane.

DevSecOps Consulting

DevSecOps covers the three key areas of people, process and tools for continuous delivery of software development. With the objective of improving speed and time to market in software development, culture, roles, teams and operating model have become important from a people perspective within DevSecOps. One more element has become integral to DevOps: security. It now occupies center stage and is integrated within the DevOps life-cycle by most service providers. The process elements within DevSecOps, which involves Agile, continuous integration and continuous development (CI/CD), continuous feedback, shift-left and workflow management, contribute to accelerated software development and delivery.

DevSecOps has gained substantial traction in recent years, and this is evident in the thin boundaries it shares with Agile development. DevSecOps growth is being led by the need to deliver agility in business. Service providers are basing their DevSecOps services on the key tenets of people over process over tools, amplified feedback, Lean management, auto-gating, chaos re-engineering, continuous integration and continuous delivery. Culture (to adopt DevSecOps practices), automation (for code generation), artificial intelligence

(AI) and machine learning (ML) practices for visibility, and tools usage (open-source and proprietary) are some of the other key drivers that have an impact on DevSecOps delivery by service providers.

Service providers leverage their proprietary assets composed of tools, accelerators, frame-works and other IP, to deliver DevSecOps. These assets broadly cover the lifecycle stages of plan, build, test and deploy. Many tools, both open-source and niche, are available in the ecosystem. Service providers are increasing their partnerships with tool vendors to introduce more flexibility in their client engagements. Several service providers also offer centers of excellence (CoEs) for DevSecOps to facilitate sharing of best practices along with IP creation. Talent enablement for DevSecOps is another focus area for service providers, which have launched dedicated learning initiatives for technologies and tools.

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Introduction

Simplified illustration

Next-Gen Application Development & Maintenance Services	
Next-gen ADM	Application Maintenance Services – Midmarket / Niche
Agile Development	DevSecOps Consulting
Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts

Source: ISG 2020

Definition

Application outsourcing continues to evolve, and service providers are increasingly adopting Agile development practices for their service delivery. Changes are being driven by client demand for increased velocity, more frequent updates and feature-led, intuitive and interactive digital applications. Although the application outsourcing market continues to have waterfall-based traditional development engagements, the incorporation of disruptive Agile-based operating models continues to outpace the former, thereby making core development model a direct competitive advantage for many enterprises. Enterprise customer requirements are currently being led by mobile and other emerging technologies, which, in turn, are fueling the transformation of the application services landscape.

Enterprises are adapting to this changing environment through faster releases and deployments of application services. Of course, not all application outsourcing is the same, because not all buyers and users have the same needs. The typical application development and maintenance (ADM) services include application consulting, design, custom development, packaged software

Definition (cont.)

integration, operations, quality assurance, security and testing. However, the elements related to speed and faster releases in this traditional approach are coming from DevOps and Agile methodologies. Service providers are leveraging application programming interfaces (APIs) and microservices and are utilizing low-code/no-code platforms, containers and a cloud-native approach to build nimble, manageable applications and accomplish their speedy release.

ISG has been witnessing contracts where clients are looking to new ways to leverage software capabilities to solve business problems and gain competitive advantage, as well as to address the increasing need to improve speed to market. Service providers are augmenting their traditional ADM offering with these emerging methodologies, technologies and collaborative frameworks to meet their clients' objectives. ISG terms such contract types as next-gen ADM contracts. This study focuses on understanding client objectives and assessing provider capabilities to deliver on next-gen ADM contracts.

Scope of the Report

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on relevant provider' strengths and weaknesses;

- A differentiated positioning of providers by segments;

- Focus on different markets, including the U.S., Germany, the U.K., the Nordic countries and Brazil.

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 therefore have 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.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have 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 to 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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

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Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 1 of 4

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
a1qa	Not In	Not In	Not In	Not In	Not In	Contender
Accenture	Leader	Not In	Not In	Not In	Not In	Not In
Atos	Leader	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
Birlasoft	Contender	Product Challenger	Product Challenger	Contender	Product Challenger	Contender
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
Lumen	Not In	Contender	Not In	Contender	Contender	Contender
Cigniti	Not In	Not In	Not In	Not In	Rising Star	Product Challenger
Coforge	Product Challenger	Leader	Product Challenger	Not In	Leader	Product Challenger
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Cybage	Contender	Product Challenger	Not In	Contender	Leader	Product Challenger
DXC	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger

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Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 2 of 4

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
HCL	Leader	Not In	Leader	Leader	Not In	Leader
Hexaware	Product Challenger	Leader	Rising Star	Not In	Leader	Not In
IBM	Leader	Not In	Leader	Product Challenger	Not In	Leader
Infinite	Contender	Market Challenger	Not In	Not In	Product Challenger	Contender
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
Innominds	Not In	Not In	Product Challenger	Product Challenger	Product Challenger	Not In
LTI	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Rising Star
Mindtree	Product Challenger	Leader	Leader	Product Challenger	Leader	Not In
Mphasis	Product Challenger	Leader	Contender	Contender	Contender	Not In
NTT DATA	Product Challenger	Not In	Not In	Not In	Not In	Not In
Persistent	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 3 of 4

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
QA Consultants	Not In	Not In	Not In	Not In	Contender	Not In
QA Mentor	Not In	Not In	Not In	Not In	Not In	Contender
Qualitest	Not In	Not In	Not In	Not In	Not In	Contender
ScienceSoft	Not In	Contender	Not In	Not In	Not In	Not In
SLK Group	Not In	Contender	Contender	Contender	Contender	Not In
Stefanini	Not In	Contender	Contender	Contender	Not In	Contender
TCS	Leader	Not In	Leader	Leader	Not In	Leader
Tech Mahindra	Product Challenger	Not In	Product Challenger	Leader	Not In	Market Challenger
TestingXperts	Not In	Not In	Not In	Not In	Contender	Not In
TestMatick	Not In	Not In	Not In	Not In	Contender	Not In
TO THE NEW	Not In	Contender	Product Challenger	Not In	Contender	Not In

Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 4 of 4

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
Trianz	Not In	Product Challenger	Not In	Not In	Not In	Not In
Unisys	Contender	Product Challenger	Contender	Contender	Product Challenger	Not In
UST Global	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Leader	Not In
Virtusa	Product Challenger	Leader	Product Challenger	Not In	Product Challenger	Not In
Wipro	Leader	Not In	Leader	Leader	Not In	Leader
YASH Technologies	Contender	Rising Star	Product Challenger	Contender	Contender	Not In
Zensar	Contender	Leader	Contender	Product Challenger	Product Challenger	Product Challenger

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Next-gen Application Development & Maintenance (ADM) Services Quadrants

ENTERPRISE CONTEXT

Agile Development

This report is relevant to enterprises across industries in the U.S. for evaluating providers offering Agile development services.

In this quadrant report, ISG highlights the current market positioning of providers of Agile development in the U.S., based on depth of service offering and market presence.

Many enterprises, due to changing business needs, want to develop applications with greater speed, shorter time to market and shorter release cycles in order to increase efficiency. Enterprise application development has evolved at a rapid pace and now is moving toward cloud-based platforms, owing to the factors like easy scalability and integration. Enterprises now want to develop applications that fit the overarching technology landscape. Also, ISG observes increasing demand for APIs and reusable components to enable easy integrations across solutions.Compared with other regions/ countries, enterprises in U.S. are leading from the front in terms of adopting these technologies in their business processes. These enterprises have specific IT infrastructure needs, such as security, agility, scalability and integrity. A service provider can support an enterprise client by addressing all the needs. Also, enterprise clients need to evaluate providers not only on their capabilities but also on the frameworks developed and different methodologies used during the course of development.

Who should read the report:

IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers in their Agile practice and to understand how they integrate the latest technologies/capabilities into their service offerings to find a competitive edge in the market.

Line-of-business and industry leaders should read this report to understand the relative positioning of the partners that can help them effectively procure the application services for their business/industry and to ensure return on investment.

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AGILE DEVELOPMENT

Definition

Agile development mainly focuses on the frameworks and principles of Agile, a collaborative way of working together in uncertain circumstances. In the software development domain, Agile showcases an incremental and iterative approach to application development, with the ability to adapt and respond to change as the key tenets. Because Agile encompasses frequent, short development cycles and early releases of the software product, enterprises are viewing it as a medium for attaining enterprise agility. Agile includes frameworks such as Scrum, Extreme Programming (XP), feature-driven development (FDD) and the dynamic systems development method (DSDM).

Led by business needs such as feature-rich, interactive applications and faster time to market, application development is being transformed by the onset of several new technologies, such as APIs, microservices, cloud-native technologies, low-code/no-code platforms and containers.

Next-gen Application Development & Maintenance (ADM) Services
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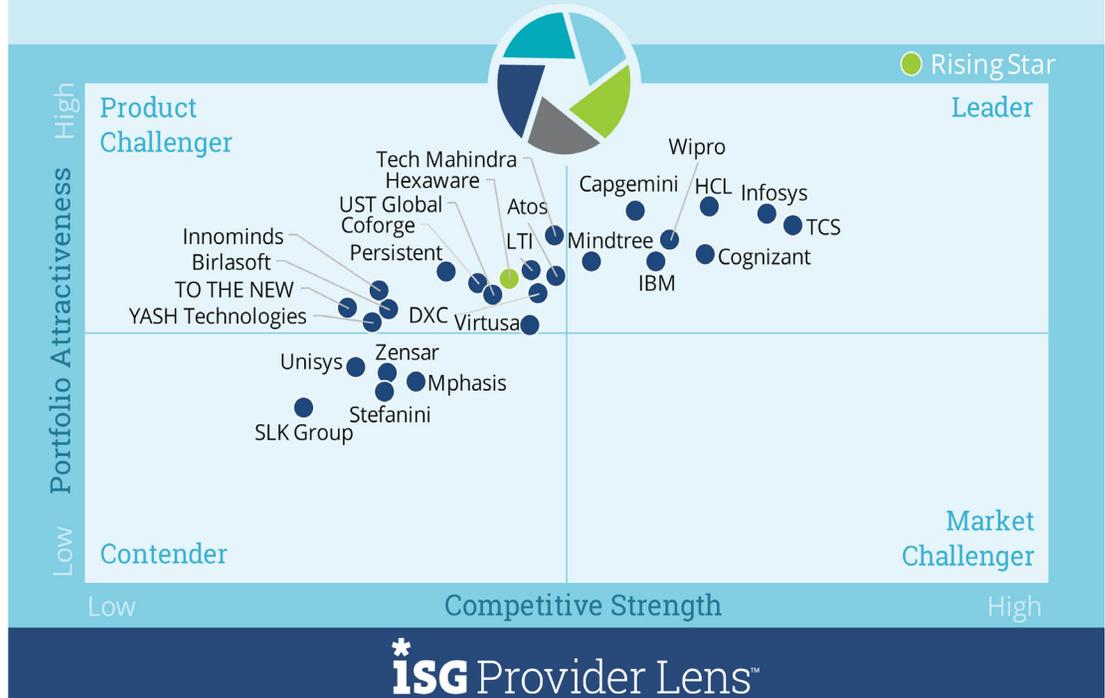
AGILE DEVELOPMENT

Definition (cont.)

APIs and microservices are used to break monolithic enterprise applications into smaller, independent, loosely coupled reusable services, which reduces complexity and makes applications easier to manage. Low-code and no-code platforms allow applications to be created without the need to write code, by using a visual development environment to develop mobile and web applications by dragging and dropping components and connecting them. Providers are integrating these technologies into their Agile development approaches to meet the objectives of having a simplified application codebase, resiliency and manageability.

This quadrant analysis assesses the capabilities of a provider to deliver tangible results through the use of various Agile methodologies like Scrum, Kanban, Crystal, Extreme Programming and others. It also looks at the focus a provider has toward the use of Agile development within its overall application development practice.

Eligibility Criteria

- Ability to deliver tangible results through the use of various Agile methodologies, like Scrum, Kanban, Crystal, Extreme Programming (XP) and others

- Capabilities and a dedicated team of Agile-certified Scrum Masters with certifications such as PMI-ACP, Scrum Alliance SCM, SAFe, EXIN and others

- Capacity to scale Agile outsourcing to enterprise-grade clients

- The provider should have carried out API lifecycle management functions composed of library maintenance, usage statistics, performance monitoring, updates, security, reuse patterns and documentation, along with the API security for a minimum of 10 clients.

- Microservices should have been used to redefine the monolithic application architecture in at least three industry domains/verticals.

- Providers should have demonstrated capabilities to manage, monitor and test microservices.

- The provider should offer some form of a low-code or no-code platform or asset for application development and have carried out live implementations for clients using the platform.

AGILE DEVELOPMENT

Observations

- **Capgemini** is a leader due to its distributed and scaled Agile delivery, service engagement playbook to drive agility and EASE framework for Agile transformation.

- **Cognizant's** large pool of skilled Agile practitioners, Agile best practices, large-scale frameworks and partnerships with a few leading automation tool vendors make the provider a leader in Agile development.

- **HCL's** Agile practice is strengthened by the company's proprietary FENIX model for scaled Agile delivery, along with investments in skills progression of its workforce through its Knowledge Academy, Communities of Practice (CoPs), Open Spaces and hackathons.

- **IBM** integrates Agile throughout the application development life-cycle across multiple engineering disciplines through Agile-focused education, tooling, processes and frameworks, making it a leader.

- **Infosys** has a large pool of Agile-ready resources. Led by its chairman's vision to be Agile ready, the company has made significant investments that include developing a strong education roadmap delivered through its learning platform, partnerships with ecosystem players and design innovation hubs.

- **Mindtree's** cultural-transformation-focused Agile Center of Practice (ACoP) and its innovation- and ROI-focused GATE2 framework make the company a leading service provider.

- **TCS** has a well-established broad Agile practice comprising a large pool of Agile development engineers, Scrum Masters and Agile coaches. The company's investments in collaborative Agile virtual workspaces, reusable tools and an Agile portal make it a leader.

- **Wipro's** Agile Anywhere framework for Agile services delivery, along with its learning and certification initiatives on open-source tools, have made it one of the leading service providers.

- **Hexaware** has a distributed scaled Agile model and focuses on product-centric development, organization change culture and training its resources to enhance team productivity. This has established the company as a Rising Star.

RISING STAR: HEXAWARE

Overview

Hexaware is an emerging IT services provider headquartered in Navi Mumbai, India. The company delivers to clients through a distributed scaled Agile model for Agile transformation. The company derives 95 percent of its application development revenue from Agile. It has 75 clients in the U.S. It has close to 8,000 Agile development engineers. The company's 100 percent Agile resources are trained in Scrum and Kanban methodologies. Hexaware acquired Mobiquity in 2019 to strengthen its Cloudify Everything and Customer Experience Transformation offerings.

Strengths

Distributed scaled Agile model: Hexaware's distributed scaled Agile model uses modern delivery committee, coach, product owner and product architect roles, along with an Agile culture and collaboration tools such as Microsoft Teams, to offer continuous delivery. It also has a well-defined framework comprised clear roles and ceremony definitions with clear inputs, outputs and overlap times for ceremonies across many time zones.

Delivery approach: Hexaware's modern delivery addresses product management, business stakeholder alignment and coaching. It also focuses on organizational change management (OCM) culture change, modern architectures and customer reaction analysis through Google Analytics and other tools. Hexaware provides coaching for all stakeholders in the process to ensure effective adoption of techniques and tools to quickly provide the maximum impact.

Focus on training: With a focus on enhancing team productivity, Hexaware trains and cross-trains all developers to be able to work in more than one discipline.

Caution

Hexaware could consider collaboration tools apart from Microsoft Teams, such as Slack, to enhance Agile resource productivity.

2020 ISG Provider Lens™ Rising Star

Hexaware's focus on its distributed scaled Agile model, learning initiatives and collaboration-related initiatives make it a Rising Star.

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Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2020 – Next-gen Application Development & Maintenance (ADM) Services" analyzes the relevant software vendors/service providers in the U.S. 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. Definition of Next-gen Application Development & Maintenance (ADM) Services market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. 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. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
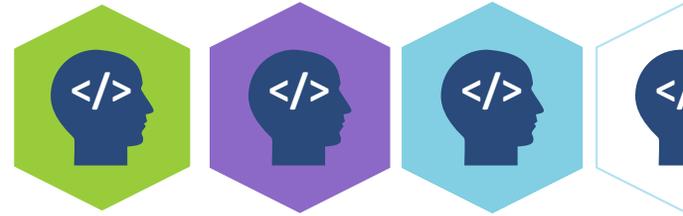
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