

Everest Group PEAK Matrix™ for Next-generation QA Service Providers 2020

Focus on Cognizant
March 2020



Background of the research

Enterprises aiming to jump on the transformation bandwagon are exploring new-age technologies to provide them the differentiating edge, enabling business model evolution and expansion of business boundaries. However, to support the quest of achieving the desired benefits without impairing existing operations, comprehensive Quality Assurance (QA) for these next-generation technologies becomes essential. Next-gen QA is not only limited to the knowledge of emerging technologies, but also involves quality engineers with more agile, shift-left, inclusive, and automation-led delivery model.

To help enterprises in their journey, service providers' trifecta – people, process, and technology – needs to be aligned toward emerging business imperatives. Also, as quality engineers permeate further in the overall development process, in a multi-vendor construct, aspects such as coordination, responsibility sharing, and timeline management require mature engagement and governance models.

In this research, we present an assessment and detailed profiles of 19 next-gen QA service providers featured on the next-gen QA services PEAK Matrix™. Each service provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2019, interactions with leading 19 services providers, client reference checks, and an ongoing analysis of the next-gen QA services market.

Scope of this report

- **Services:** Next-gen QA services
- **Geography:** Global
- **Service providers:** 19 leading QA services providers

This report includes the profiles of the following 19 leading next-gen QA service providers featured on the next-gen QA services PEAK Matrix:

- **Leaders:** Accenture, Atos, Capgemini, Cognizant, TCS, and Wipro
- **Major Contenders:** Cigniti, DXC Technology, HCL Technologies, Hexaware, Infogain, Infosys, LTI, NTT DATA, and UST Global
- **Aspirants:** GAVS, Softek, Tavant, and TestingXperts

Introduction and scope

Everest Group recently released its report titled “[Next-generation Quality Assurance \(QA\) Services PEAK Matrix™ Assessment 2020](#)”. This report analyzes the changing business dynamics of the next-generation QA services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 19 service providers on the Everest Group PEAK Matrix™ for next-generation QA services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of next-generation QA service providers based on their absolute market success and delivery capability.

Based on the analysis, **Cognizant emerged as a Leader**. This document focuses on **Cognizant’s next-generation QA services** experience and capabilities and includes:

- **Cognizant’s** position on the next-generation QA services PEAK Matrix
- Detailed profile of **Cognizant** for next-generation QA services

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Next-gen QA services PEAK Matrix characteristics

Leaders:

Accenture, Atos, Capgemini, Cognizant, TCS, and Wipro

- Leaders are making forward-looking investments in next-gen QA area by setting up labs and acquisitions; and have a robust talent development roadmap
- Leaders have a strong client orientation with broad coverage and evolved role of QA in engagements across multiple technology stacks in next-gen QA

Major Contenders:

Cigniti, DXC Technology, HCL Technologies, Hexaware, Infogain, Infosys, LTI, NTT DATA, and UST Global

- Major Contenders have invested significantly in IPs and partnerships with technology vendors, but the coverage is restricted to only selected next-gen areas
- Major Contenders are focusing on evolving their messaging from automation-led QA to ensure QA for next-gen applications with focused investments

Aspirants:

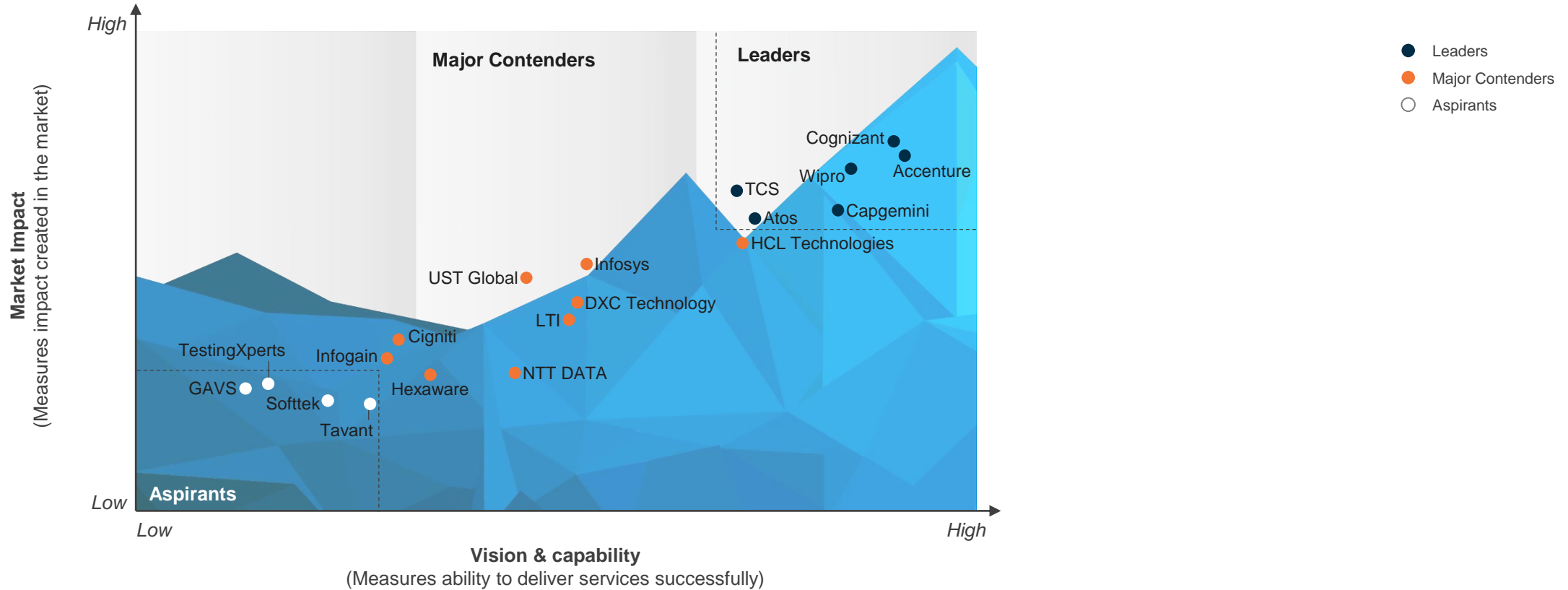
GAVS, Softtek, Tavant, and TestingXperts

- Aspirants have developed capabilities leveraging automation and AI to deliver quality assurance services; however, they need to continue investments in order to mature QA services offering for next-gen applications
- Aspirants have carved out their niche with focused QA capabilities, along with a high degree of flexibility, however they need to ensure talent availability and readiness for evolving technology needs

Everest Group PEAK Matrix™

Next-generation Quality Assurance (QA) Services PEAK Matrix™ Assessment 2020 | Cognizant positioned as Leader

Everest Group Next-generation Quality Assurance (QA) Services PEAK Matrix™ Assessment 2020



Note 1: PEAK Matrix specific to next-gen QA services

Note 2: Assessments for Softtek includes partial inputs from the service provider, and is based on Everest Group's estimates that leverages its proprietary data assets, service provider public disclosures, and interaction with buyers

Overview

Strengths

- Cognizant has demonstrated reasonable proof points along with business impact across different areas in next-gen QA, particularly in AI and blockchain
- Resources deployed in projects generally possess strong domain expertise
- Cognizant is perceived to be very flexible in its engagement and commercial models

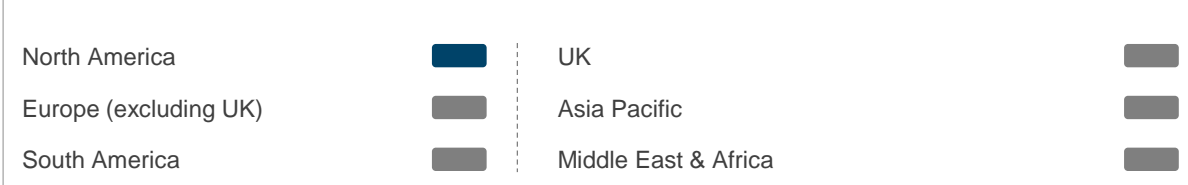
Areas of improvement

- Cognizant needs to further demonstrate proof points for next-gen QA services in clients where it is not already an incumbent
- There is room for Cognizant to further enhance its value proposition messaging for next-gen QA services

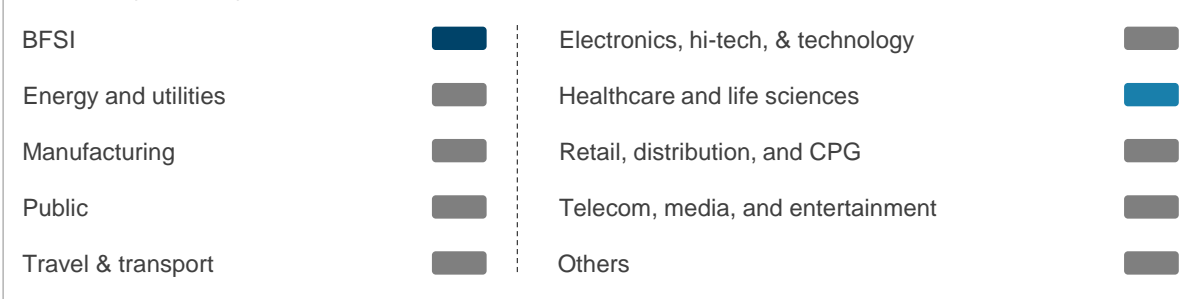
Scope of coverage for next-gen QA services

Cognizant's Next-gen QA services cover AI, distributed ledger, big data, immersive technologies (AR/VR/MR), cloud native applications, and connected ecosystems (IoT). These Next-gen QA services are underpinned by quality engineering and advisory capabilities.

Revenue by geography



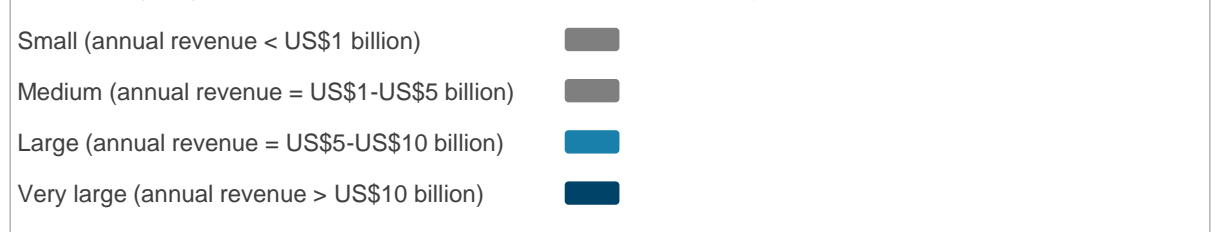
Revenue by industry



Revenue by application



Revenue by buyer size



Cognizant | Next-gen QA services profile (page 2 of 3)

Vision, case studies, and investments

Vision: Cognizant’s vision is to assure clients' success in digital through quality engineering by bringing together deep industry and technology expertise and driving quality at speed.

Case study 1	
Client: A leading energy and utilities provider	
Business challenge	The client wanted a solution to assure seamless functioning of connected devices and applications for IoT-based smart home solutions.
Solution and impact	Cognizant developed a solution with assured interoperability of IoT devices by simulating smart home ecosystem in a test lab. Robotic testing with Cognizant TEBOT eliminated human intervention and reduced release time by 50%. It achieved 75% increase in its customer base through improved customer experience.

Case study 2	
Client: A global robotics firm	
Business challenge	The client wanted a solution to assure localized release of humanoid robots for European markets.
Solution and impact	Cognizant performed QA for more than 15 AI applications governing humanoid robot's vision, speech recognition, language, and motion. Developed an end-to-end testing of AI operating system with over 5,400 tests. Cognizant offered localized delivery through the company’s Grenoble delivery center in France.

Proprietary solutions (representative list)	
Solution name	Details
Cognizant’s Artificial Intelligence Lifecycle Assurance (AILA)	It enables end-to-end assurance encompassing data, model, process, security, and performance for AI-based applications
Digital Assurance for Voice (DAVO)	It is Cognizant's assurance solution for Digital Assistants, which enables automated, business-aligned testing and training for conversational AI such as Amazon Alexa. The solution supports multiple accents and utterances for improved customer experience
TEBOT	It is a robotic test solution that automates testing of IoT solutions, such as home automation and wearables, by mimicking human-machine interactions
Cloud Anchor	It is Cognizant’s workbench for end-to-end testing of cloud migration and cloud native applications

Cognizant | Next-gen QA services profile (page 3 of 3)

Investments and partnerships

Next-gen QA services investments (representative list)

Investment theme	Details
Acquisitions	Acquired Softvision, a leading digital engineering firm with expertise in Agile software development and Next-gen QA
	Acquired multiple companies including Zenith, Hedera, Mustache, etc., to drive cohesive digital transformation for clients, embedding Next-gen QA
Immersive digital labs	Invested in industry-aligned digital experience centers, collaboratories, and labs for technology and Applied AI, etc., to accelerate idea-to-code with Next-gen QA
Talent transformation	Invested in talent transformation program to reskill QA talent for next-gen QA

Next-gen QA services partnerships (representative list)

Partner name	Type of partnership	Details
Amazon	Strategic partnership	Partnered with Amazon for training and testing of Alexa Conversational AI, cloud-native testing, and infrastructure hosted on AWS cloud
Microsoft	Strategic partnership	Partnered with Microsoft for testing tools and Next-gen QA services such as big data, cloud-native applications, Azure, IoT, and AR/VR/MR
GenRocket	Technology partnership	Partnered with GenRocket for intelligent test data management in Agile
Cognizant partnered with IBM, Google, Worksoft, Microfocus, SmartBear, Tricentis, Delphix, Neotys, HPE, Intellicorp, Plutora, Qlik, CA Technologies, CAST, Synopsys, Perfecto Mobile, and Mobile Labs, among others, for delivering next-gen QA services.		

Recent activities in next-gen QA services (representative list)

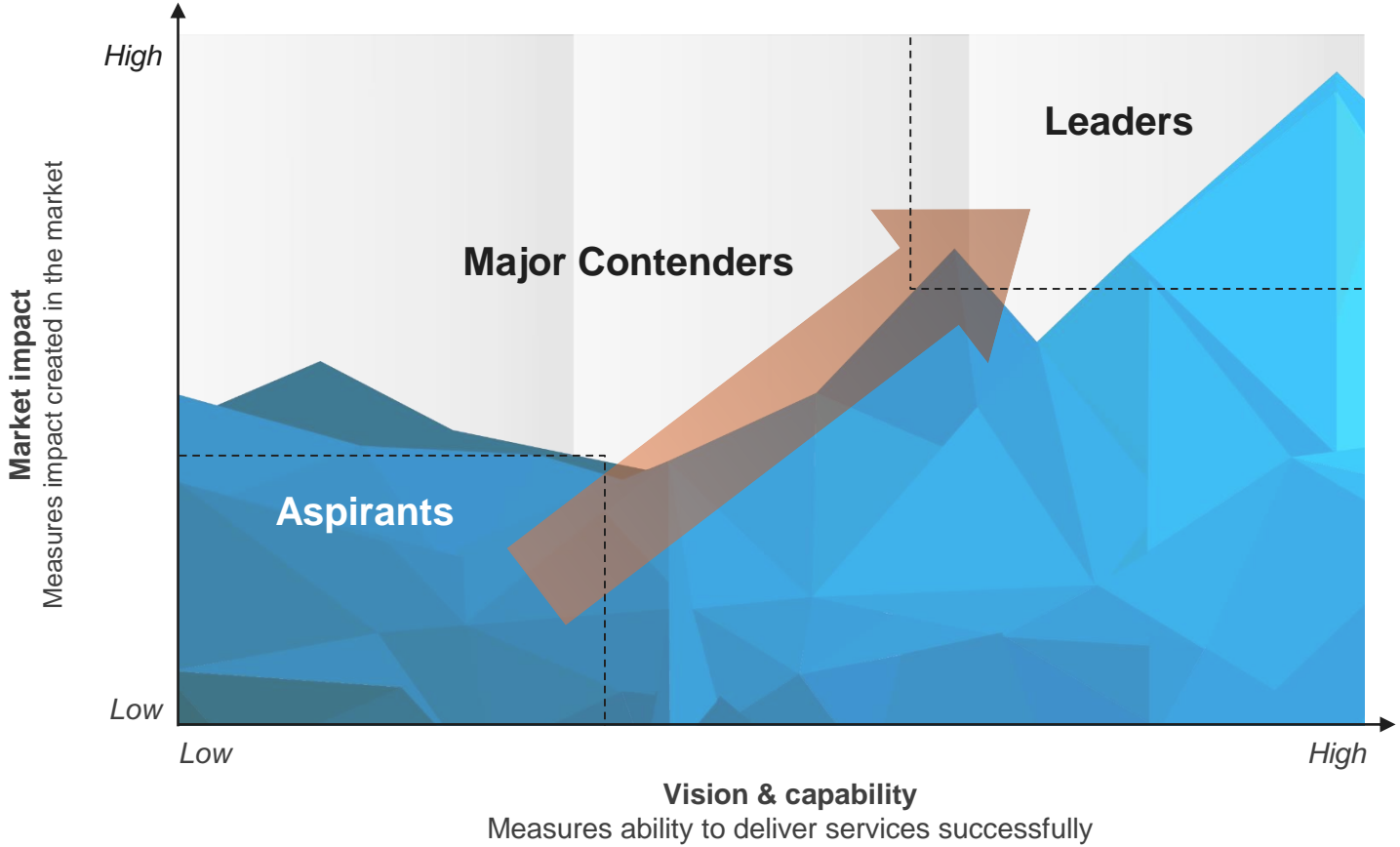
Development	Details
Award	Awarded "Brandon Hall Gold Award 2019" for best learning program supporting a change transformation business strategy for transforming the company's QA talent model
Regional delivery centers	Opened delivery centers to scale across North America and Europe for Next-gen QA delivery

Appendix

Everest Group PEAK Matrix™ is a proprietary framework for assessment of market impact and vision & capability



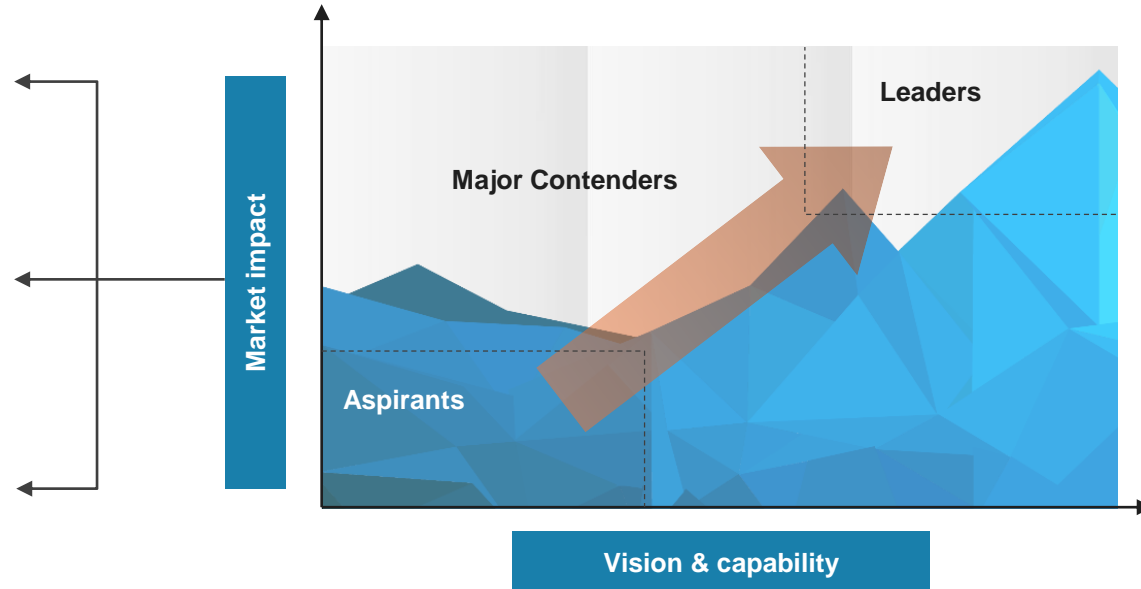
Everest Group PEAK Matrix



Services PEAK Matrix™ evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
No. of clients, revenue base, and YOY growth, deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geos and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service sub-segments / processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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