A research report comparing provider strengths, challenges and competitive differentiators
About this Report

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

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

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EXECUTIVE SUMMARY

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

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

Next-Gen ADM

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

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

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

Agile Development

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

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

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

**Continuous Testing**

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

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

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

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

**Next-Gen ADM – BFSI**

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

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

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

Next-Gen ADM – Healthcare & Life Sciences

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

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

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

Next-Gen ADM – Manufacturing

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

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

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

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

Definition

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

**Scope of the Report**

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

**Next-Gen ADM**

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

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

**Agile Development**

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

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

**Continuous Testing**

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

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

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

Next-Gen ADM – BFSI

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

Next-Gen ADM – HCLS

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

Next-Gen ADM – Manufacturing

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

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

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

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

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

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

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

Not In

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

<table>
<thead>
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Next-Gen Application Development & Maintenance (ADM) Services Quadrants
Definition

The Next-Gen BFSI industry quadrant includes ADM services provided to Banking, Diversified Financial, and Insurance companies.

This quadrant assesses the strength of providers that provide Next-Gen ADM services to BFSI industry vertical.
Cognizant's innovative solutioning across the BFSI value chain and sector-oriented partnerships are some key attributes that help in catering to financial clients in the U.S.

DXC's ITO capabilities, rich product set and industry partnerships offer a distinct value proposition for clients belonging to the BFSI sector in the U.S.

HCL's rich toolset, strategic partnerships and micro-verticalized focus is helping to create tailored BFSI solutions for its U.S. clients.

Infosys' expertise in newer technology, go local strategy and investment in fintech is translating into newer opportunities with financial enterprise in the U.S.

LTI's domain expertise, Next-Gen solutioning and co-innovation initiatives is transpiring to strategic deal wins in U.S. BFSI sector.

Virtusa's business focused transformation, vertical-specific tooling and domain expertise form its core strengths.

TechM's formation of core alliances and platform strategy makes it a worthy option for BFSI engagements in the U.S. and earned the "Rising Star" position.
Overview

The U.S. contributes between 70 and 80 percent of LTI’s overall ADM revenue from the BFSI industry. It has around 50 BFSI clients in the region, which are supported by more than 4,000 FTEs.

Strengths

Domain experience: LTI has experience in building large-scale solutions for BFSI clients. It has built a complex derivatives-settlement platform that settles $60 trillion worth of derivatives trade. It also has built one of the largest global custody platforms, and one of the industry's largest data lakes to manage financial and regulatory reporting for one of the largest global banks.

Next-gen solutioning: LTI has developed emerging technology solutions to take advantage of the next wave of client investment in the BFSI industry. Over 30+ solutions are developed across AML, KYC, risk & regulatory, asset management, connected insurance, trade finance and cards. Few prominent ones include blockchain for trade, machine learning for financial crime investigation, automated claim adjudication reducing the loss adjustment expenses, selfe-suite for underwriting with minimal questions, and various technologies for its investor services automation stack.

Co-innovation initiatives and “finnovation” pods: In 2017 LTI conducted close to 50 co-innovation initiatives for the BFSI segment, including hackathon events and collaborations with financial and insurance tech companies and academia. LTI also has built five Finnovation pods for its customers that include innovation labs and experience centers.

Caution

LTI has the right set of offerings and domain experience for the BFSI industry. To better compete with the larger players in the market it needs to ramp up its scale and presence, organically or inorganically.

2019 ISG Provider Lens™ Leader

LTI offers a full-stack of banking and insurance solutions that span traditional and digital business areas of banking, financial services and insurance organizations. This, coupled with its expanding partner-ecosystem, places the company in a position to cater to the next evolution of digital problems in the U.S. BFSI industry.
METHODOLOGY

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

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