



# Everest Group PEAK Matrix<sup>®</sup> for Quality Assurance Service Providers 2021

Focus on HCL Technologies  
November 2021



## Background of the research

- Increased adoption of agile, DevOps, and next-generation technologies such as AR/VR, AI/ML, and IoT has changed the applications testing landscape. Enterprises are no longer looking for monthly or quarterly releases, they are aiming for tens or hundreds of releases daily or weekly, which means testing cannot be a later stage activity, but has to transform itself into an engineering practice. Thus, service providers are innovating at a faster pace with focus on extreme automation and embedding AI/ML, thus optimizing the testing process
- COVID-19 brought unprecedented customer demands and the need for scalability, which drove the Quality Assurance (QA) service providers to embrace non-functional testing such as security testing, performance testing, accessibility, and compatibility testing in their portfolio. Crowdsourced QA testing was also among those testing services, which experienced sufficient traction to accommodate various use cases such as localization testing and even security testing
- This need gave rise to a talent gap, and service providers had to train their workforce remotely to meet the demand for next-generation technologies, and increase investments in talent to transform into the Software Development Engineer in Test (SDET) model and support the change happening in the industry

The assessment is based on Everest Group's annual RFI process conducted over Q1 2021, interactions with leading QA service providers, and analysis of the QA services market.

**This report includes the profiles of the following 33 leading ABC service providers featured on the Quality Assurance services (QA) PEAK Matrix:**

- **Leaders:** Accenture, Capgemini, Cognizant, HCL Technologies, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Cigniti, Cybage, DXC Technology, EPAM, Infogain, LTI, Mindtree, QA Consultants, Qualitest, QualityKiosk, Softtek, Tavant, Tech Mahindra, TestingXperts, UST, ValueLabs, Virtusa, and Zensar
- **Aspirants:** Aspire Systems, Jade Global, Mastek, Mphasis, Sonata Software, and TO THE NEW

### Scope of this report:



**Geography**  
Global



**Service providers**  
33



**Services**  
Quality assurance services

# Quality assurance services PEAK Matrix® characteristics

## Leaders

Accenture, Capgemini, Cognizant, HCL Technologies, IBM, Infosys, TCS, and Wipro

- Leaders have a holistic portfolio of services including traditional and next-generation testing services with a focus on extreme automation and investments around developing domain capabilities and solutions to cater specific needs to critical industries. There is a strong focus on themes such as non-functional testing, crowdsourced testing beyond the user acceptance scenario, chaos testing, low-code/no-code testing tools, test data management, and test environment management
- They have gained the trust of the enterprises with their technical expertise and co-innovation efforts through continued investments in partnerships and talent development
- Leaders are facing competition from Major Contenders due to their active investments and innovation in next-generation Quality Engineering. Leaders need to focus on building innovative end-to-end solutions and services across next-generation themes and innovate in the engagement models with their proven technical and domain expertise

## Major Contenders

Atos, Cigniti, Cybage, DXC Technology, EPAM, Infogain, LTI, Mindtree, QA Consultants, Qualitest, QualityKiosk, Softek, Tavant, Tech Mahindra, TestingXperts, UST, ValueLabs, Virtusa, and Zensar

- Major Contenders are a mix of end-to-end QA service providers, digital engineering firms, and independent QA service providers
- They are making active strides in investments in next-generation services and developing platforms leveraging cloud, AI/ML, and automation
- They have demonstrated meaningful capabilities and supported enterprises in moving toward Industry 4.0 by investing in key partnerships and redefining quality assurance for themselves

## Aspirants

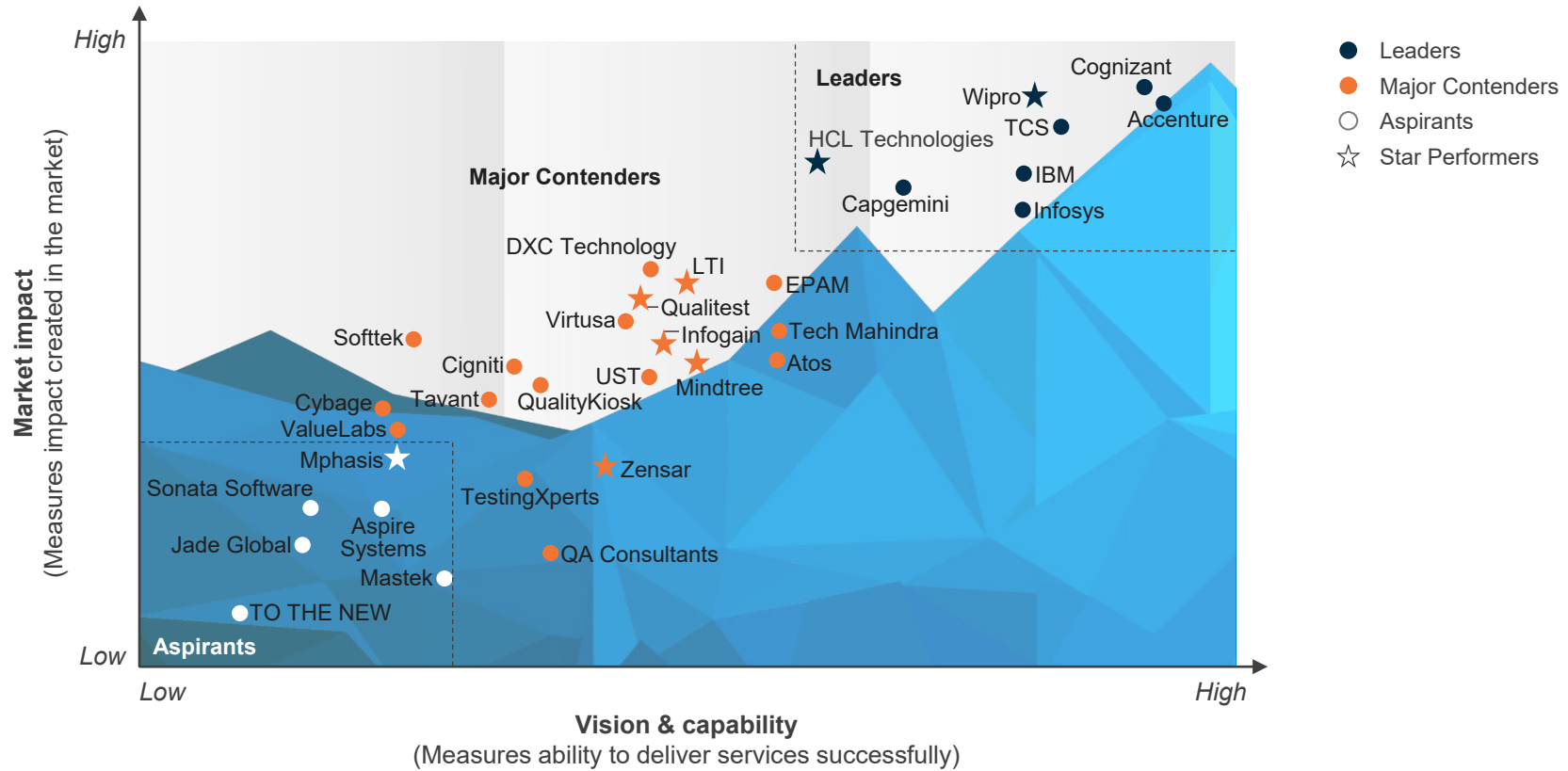
Aspire Systems, Jade Global, Mastek, Mphasis, Sonata Software, and TO THE NEW

- The Aspirants segment must focus on increasing depth and breadth of the services by forging strategic partnerships with leading technology vendors and proactively engage with enterprises to innovate
- They are actively investing in talent upskilling and incorporating next-generation QA in their portfolio and balancing their portfolio across regions and industries

# Everest Group PEAK Matrix®

## Enterprise Quality Assurance (QA) Services PEAK Matrix® Assessment 2022 | HCL Technologies positioned as Leader and Star Performer

Everest Group Enterprise Quality Assurance (QA) Services PEAK Matrix® Assessment 2022<sup>1</sup>












<sup>1</sup> Assessments for IBM excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers. Source: Everest Group (2021).

# HCL Technologies | enterprise QA services profile (page 1 of 4)

## Everest Group assessment – Leaders

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery footprint	Overall
								

### Strengths

- HCL is very well positioned to deliver quality services across different regions and verticals – especially in fast growing verticals such as BFSI, HLS and Retail
- It offers next-generation QE and crowd testing services through strategic partnerships with niche technology vendors and in-house accelerators
- Clients appreciate HCL for assuming a strategic mindset in engagements, focusing on delivering higher value, driving innovation, and enabling the adoption of next-generation QE principles
- Its co-innovation and ideation strategy with partners have helped develop stronger competencies and perception by enterprise clients

### Limitations

- Clients have expressed the need for more proactive investments in developing domain-specific innovation and capabilities
- Clients feel there is a need to improve the training of resources on next-generation technologies supplemented with more experienced resources to deliver services
- Clients have cited concerns around slower fulfillment of resources and longer onboarding time

# HCL Technologies | enterprise QA services profile (page 2 of 4)

## Overview

■ Low (<10%) 
 ■ Medium (10-20%) 
 ■ High (>20%)

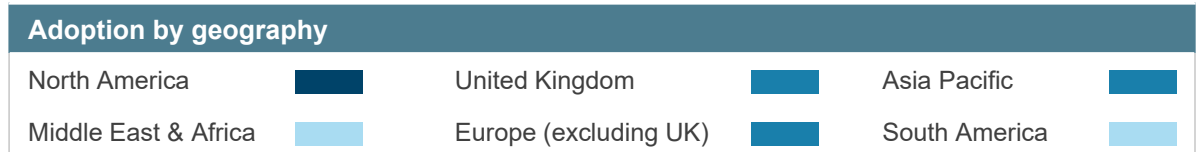
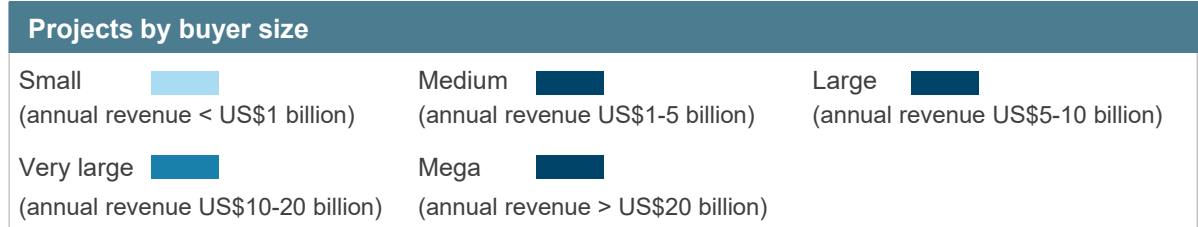
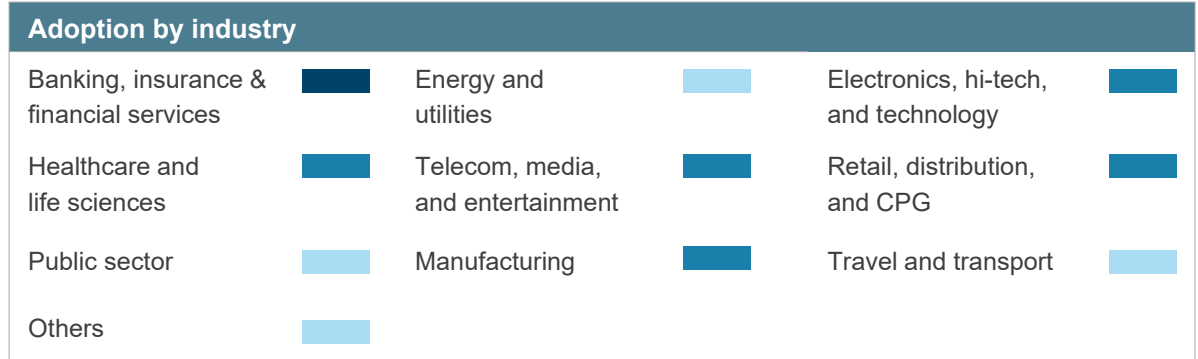
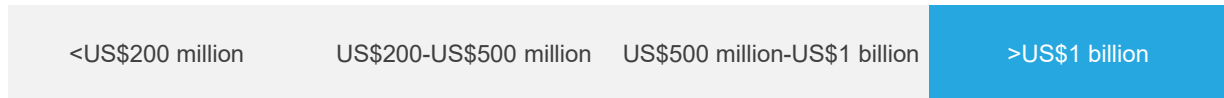
### Vision

HCL's vision is to be the preferred strategic quality assurance & engineering partner for digital enterprise. HCL offers end-to-end QA offerings integrated with Agile – DevOps, supported by an ecosystem of HCL IPs (AI/ML Powered) and HCL software.

### Scope of services

HCL's service offerings include advisory/consulting, Continuous Testing (CT) & intelligent automation, enterprise apps testing, specialized (performance, security, API & service virtualization, microservices, infra, network, TDM, TEM, embedded, device, SRE, testing in production, crowd, UX), digital QA (for SMAC, IoT, SaaS, emerging technologies), As-a-Service (TaaS, tools, labs on hire).

### QA services revenue



# HCL Technologies | enterprise QA services profile (page 3 of 4)

## Offerings

### Proprietary solutions for QA services (representative list)

Solution name	Details
HCL NexGen 2.0	Intelligent testing life cycle automation platform with built-in AI/ML & cognitive algorithms, integrated with model-based testing and CI/CD tools to support continuous testing
HCL Dock	Digital test platform that includes mobile labs on hire, experience assurance, and reusable automation libraries
HCL Software	OneTest Suite (UI, performance, API, data, and virtualization), HCL OneTest Embedded (component testing and runtime analysis), HCL AppScan
Hawk	Home-grown AI/ML tool to analyze user sentiments and social media feedbacks to refine test scenarios and user simulations

### QA services partnerships (representative list)

Partner name	Details
Tricentis	Global partnership to provide expertise and tools supporting CT in order to keep pace with Agile and DevOps
Broadcom	HCL Enterprise Studio is the preferred services partner for Broadcom Enterprise Software solutions, thereby strengthening expertise in Agile, Cybersecurity, and DevOps
GenRocket	Partnership to provide superior synthetic test data (including Test Data at Scale for testing AI /ML algorithm)
Testbirds	Crowd testing partner for usability testing, localization testing, globalization testing, mobility testing, games, and VR & AR applications testing services for our customers

### QA services investments (representative list)

Investment name/ theme	Details
Talent Readiness	Skill taxonomy – competency mapping for next-generation QA and transformation of 65% QA to digital & continuous automation skills
eSTiP	Ecosystem innovation program run by CTO that provided access to over 1000+ innovative partners
Innovation Labs	About 50+ partner-and client-specific co-innovation labs across geographies to provide first-hand experience of prototypes to clients

# HCL Technologies | enterprise QA services profile (page 4 of 4)

## Case studies

### Case study 1

#### QA transformation to support Agile DevOps delivery model

**Client** A US-based F200 financial services company

##### Business challenge

- Realigning QA operating model to support Agile DevOps adoption
- Implementation of Continuous Testing services and relevant tools to seamlessly integrate with DevOps pipeline
- Workforce transformation

##### Solution

- Adoption of Integrated QE approach
- Established agile lab at nearshore and offshore
- Distributed delivery model – The US, Guadalajara (Mexico), and Chennai (India)
- CT implemented through Automation (Selenium, WDIO), Web service (SOAP UI Pro), Performance & Monitoring (LOAD UI Pro), continuous monitoring through Prometheus, Kibana (ELK tools), and Grafana SRE implementation

##### Impact

- Around 90% of team is SDETs, automation SMEs, and specialized testing engineers
- A 50% reduction in system testing effort
- Continuous learning leveraging QE Academy curriculum for reskilling/upskilling
- Dynamic test data provisioning, automated environment validation and management, and real-time metrics reporting via an integrated dashboard

### Case study 2

#### Setup of on-the-move gaming lab for a lottery & gaming company

**Client** A US-based multinational gaming company that produces slot machines & gaming technology

##### Business challenge

- Aggressive mobility roadmap with multiple releases, parallel customer projects, and aggressive Go-live dates
- Complexities due to multiple variants in mobility environment OS, hardware, processors, multiple app stores, and network providers
- Device availability to support geographically distributed teams

##### Solution

- Established On-the-Move Gaming Lab (OMG Lab) at the offshore center by implementing the smart cloud architecture and BDD mobile automation solution
- Device inventory management to consolidate devices in centers distributed across globe and track real-time usage of devices
- Seamless execution of automation scripts across mobile and web channels by deploying common test framework (SeeTest, Appium, Selenium, and Sikuli)

##### Impact

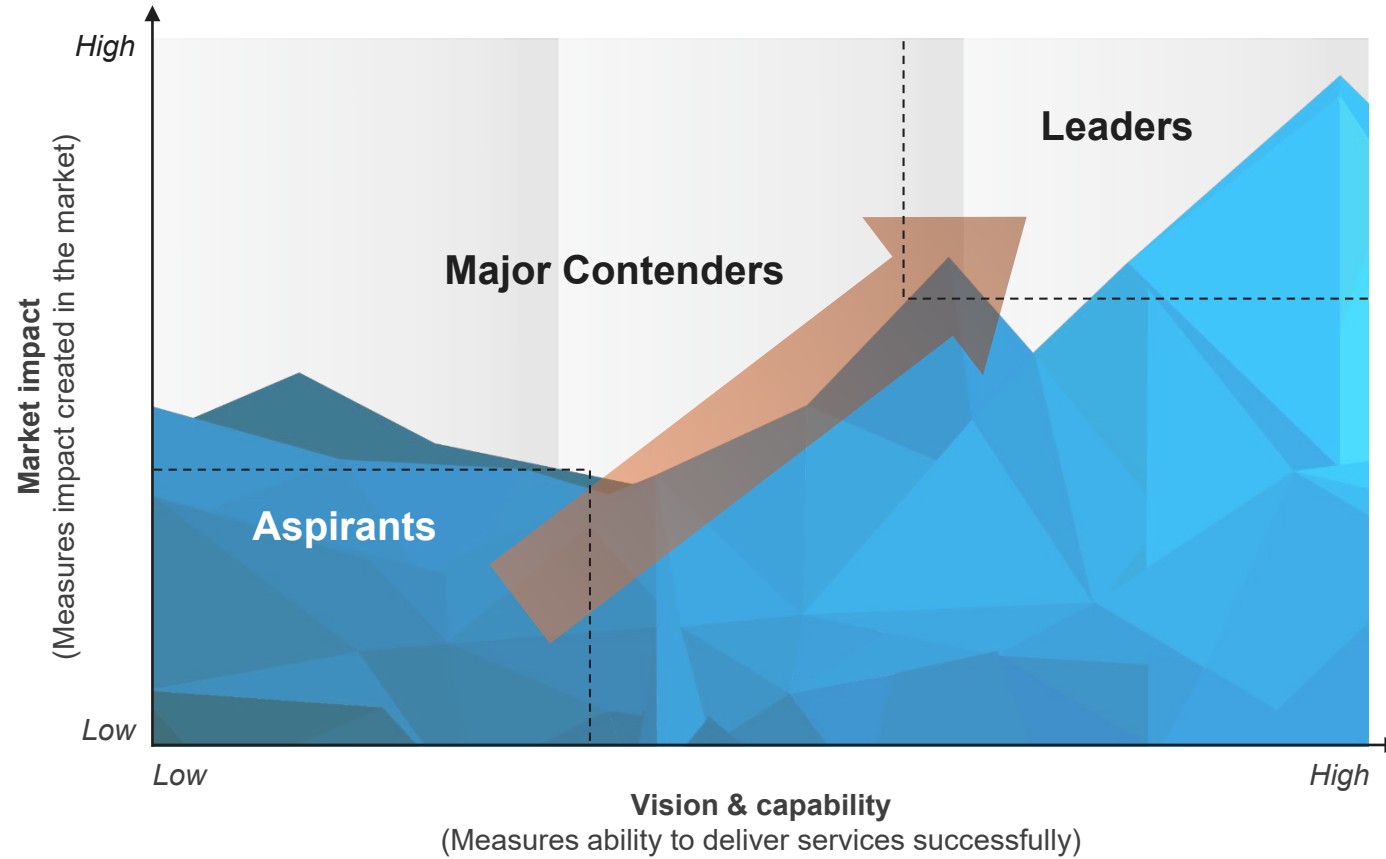
- Improved test coverage, early defect detection, and 80% improvement in time-to-market. Manual testing that was done in one week was reduced to one day
- A 60% reduction in testing effort due to cloud-based test automation
- Leveraged the lab to deliver testing services for 15 different lottery customers



# Appendix

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

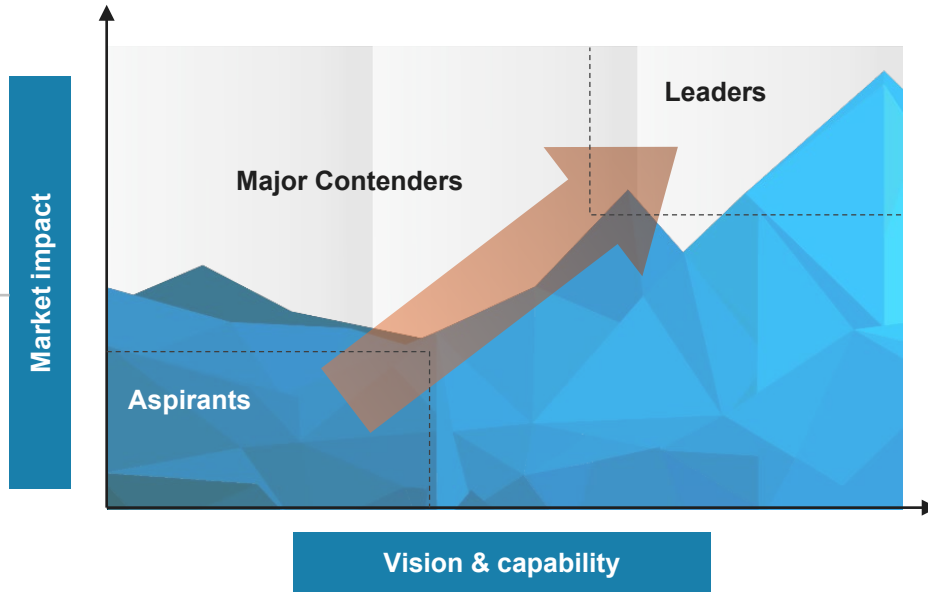
Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**  
Number of clients, revenue base, YOY growth, and deal value/volume
- Portfolio mix**  
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**  
Value delivered to the client based on customer feedback and transformational impact



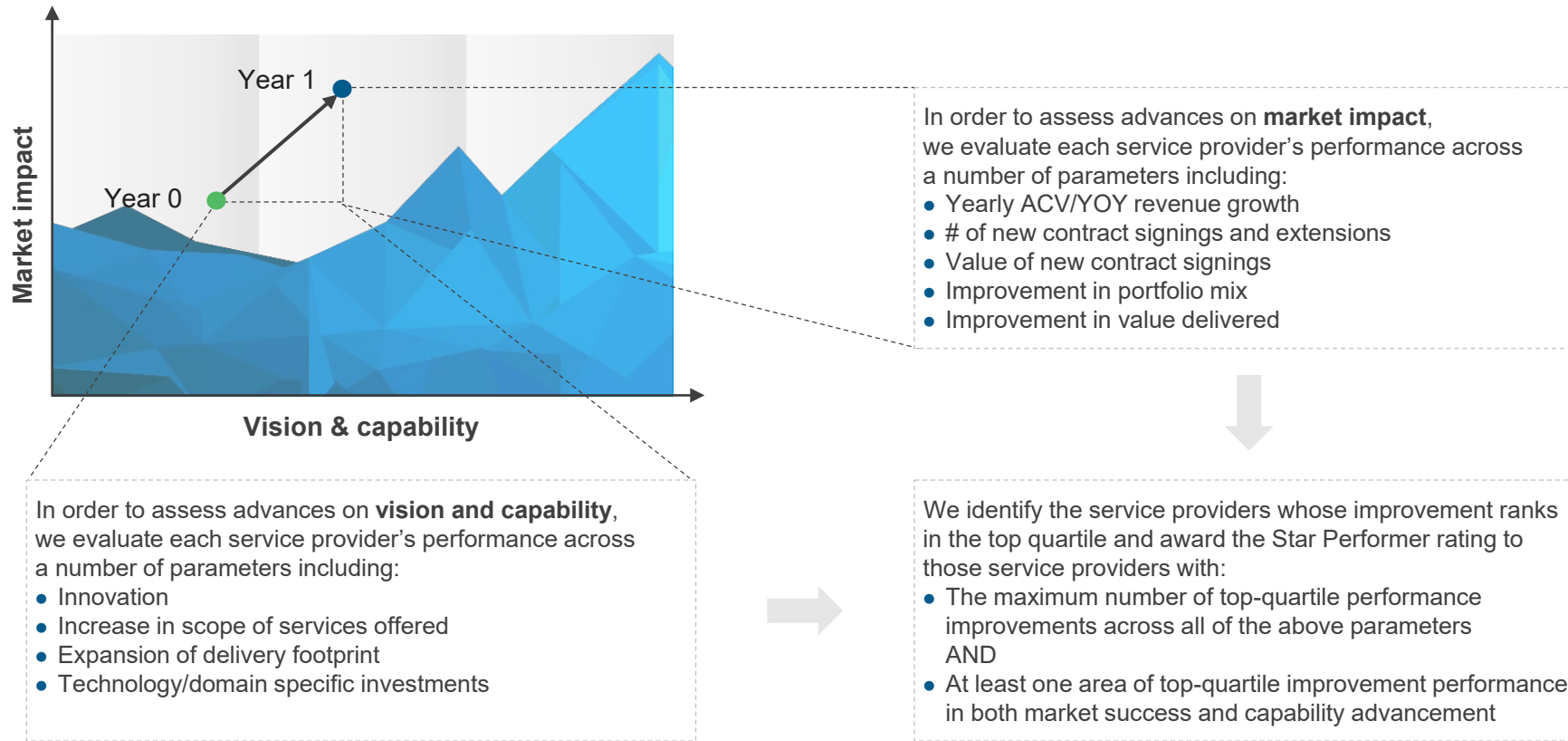
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 subsegments/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

# Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

## Methodology

Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix



The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

# FAQs

## **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



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