



Everest Group PEAK Matrix® for Quality Assurance Service Providers 2022

Focus on Qualitest
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

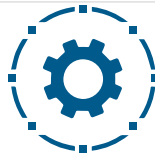
Scope of this report:



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, Softtek, 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

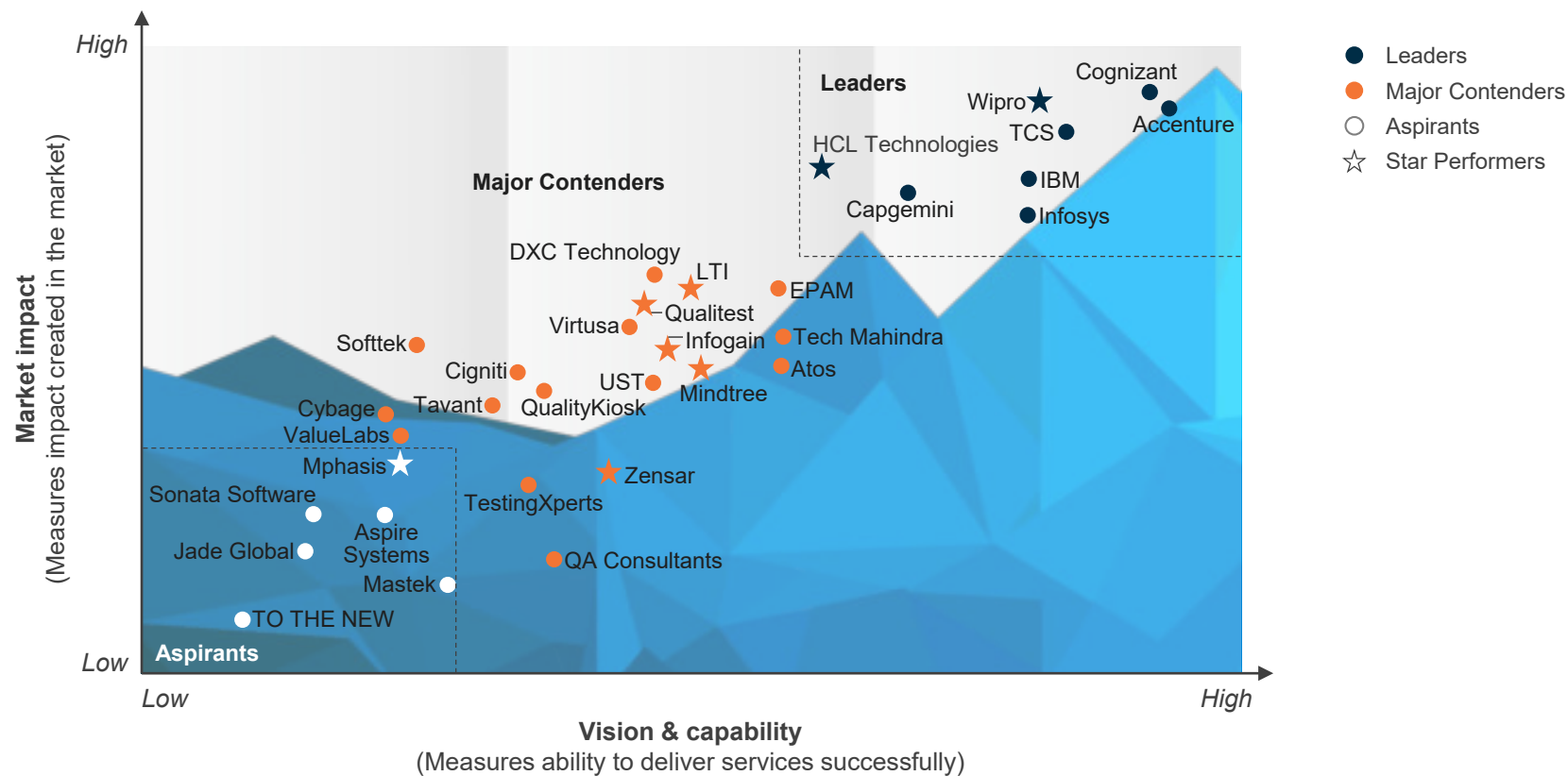
- The Aspirants segment must focus on increasing depth and breadth of the services by forging strategic partnerships with leading technology vendors and proactively engage with enterprises to innovate
- They are actively investing in talent upskilling and incorporating next-generation QA in their portfolio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

Everest Group PEAK Matrix®

Enterprise Quality Assurance (QA) Services PEAK Matrix® Assessment 2022 | Qualitest positioned as a Major Contender



Everest Group Enterprise Quality Assurance (QA) Services PEAK Matrix® Assessment 2022¹












¹ 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).

Qualitest | enterprise QA services profile (page 1 of 4)

Everest Group assessment – Major Contenders

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

- Qualitest offers a wide range of tools and solutions for enterprises looking for domain expertise and next-generation innovation in testing services
- Its resources have demonstrated strong competencies owing to its focus on actively training resources for SDET roles, and in next-generation technologies
- Clients have appreciated its responsiveness and ability to go beyond the contractual commitment and foster a long-term partnership
- It has a distributed presence across all the key industries such as BFSI, healthcare, travel, retail, and media and entertainment

Limitations

- Qualitest needs to develop more domain-specific IPs to differentiate itself in the market
- Clients unanimously seek to encourage Qualitest to be more proactive and engaging while proposing innovative solutions pertaining to the clients’ needs
- Qualitest’s resource base is present across globe; however, its offshore presence is lesser than that of its peers
- Despite serving a balanced client base in North America and the EMEA region, its presence in the APAC region is very limited as compared to its peers

Qualitest | enterprise QA services profile (page 2 of 4)

Overview

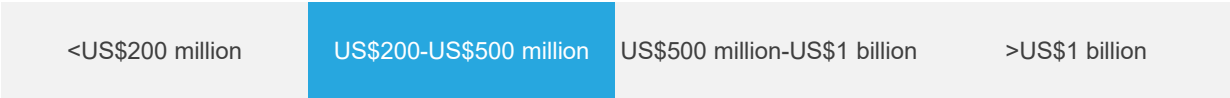
Vision

Qualitest’s vision is to become a modern and the most trusted quality engineering partner, delivering superior customer experience, and committing to the highest quality standards at record-breaking time to market.

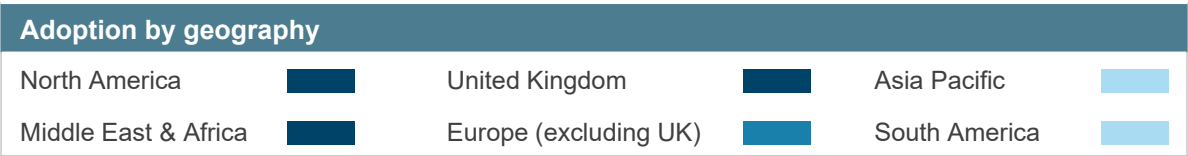
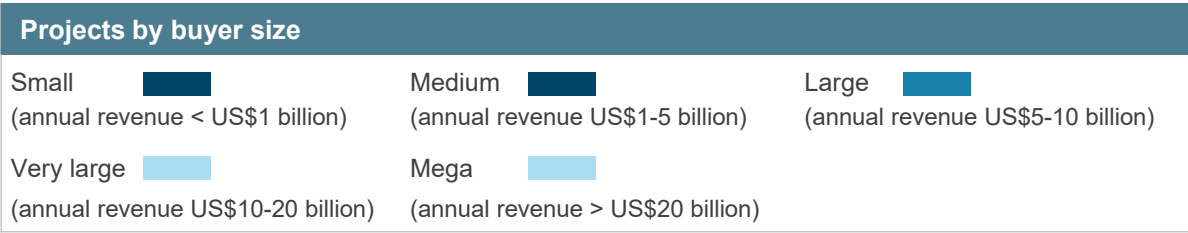
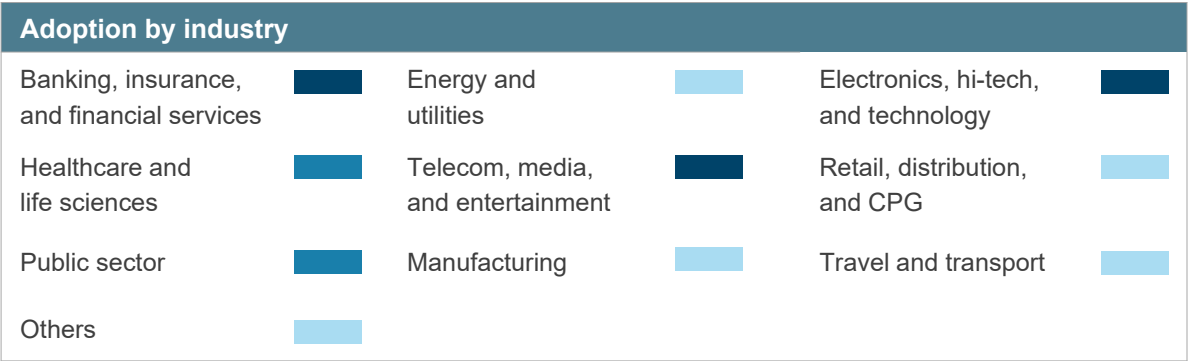
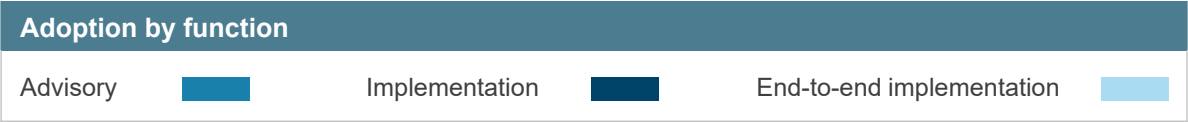
Scope of services

Qualitest’s services portfolio includes AI-led quality engineering - testing of AI, AI led diagnostics, process & transformation advisory | digital testing - cloud & SaaS, micro Services, web, mobile, IoT | E2E functional testing | managed test services | intelligent test automation | NFT including cyber - DevSecOps, ethical hacking, digital resilience & app security - performance & load, accessibility & UX-CX | language testing | fully vetted & managed bounty based crowd testing | packaged testing – SAP, Oracle, Infor, Salesforce, Workday | data analytics, data science & AI modeling services, big data & BI testing | embedded systems testing | devices & regulatory testing | project management | application development & support| BOT.

QA services revenue



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



Qualitest | enterprise QA services profile (page 3 of 4)

Offerings

Proprietary solutions for QA services (representative list)

Solution name	Details
Qualisense.BizAssure	Specialized testing of AI models applying data science to continuously improve data quality, model accuracy, and assure high impact business outcomes
Qualisense.QE	Addresses QE challenges including over-testing, delayed defect detection, and long test cycles through advanced ML, NLP, deep learning, and computer vision
Qualiview Insights	Intelligent & advanced analytics platform to drive insights across the product lifecycle, promoting shift-left culture, QE efficiency, developer, and release velocity
Qualiframe	Intelligent codeless automation framework to drive E2E automation efficiencies & optimize licensing costs. It is equipped with integrations to CI/CD pipelines & device farms, accelerating automation across web, mobile, microservices & immersive technologies, driving adoption of one unified framework across technologies & industries.

QA services partnerships (representative list)

Partner name	Details
Tricentis & SAP	Partnered with Tricentis & SAP to have a pre-built pack of repeatable automated assets and test scripts to accelerate QA
SauceLabs	Extended SauceLabs' cross-platform digital applications testing, user experience, and monitoring in a continuous testing model integrated with Qualiframe
Bugcrowd	Crowd-sourced cyber testing partnership gives Qualitest the flexibility to provide security services in a managed service model or pay-per-use bounty-based services

QA services investments (representative list)

Investment name/ theme	Details
Cyber security lab & partnerships	Focused on investing in R&D for latest solutions & partnerships in the cyber space & development of advanced shift-left cyber accelerators
Expansion nearshore & offshore	Organic & strategic M&A based expansions in Northern Ireland, Argentina, Romania, and India for scale, cost, and time zone benefits
Talent investment	Workforce transformation programs to enable & support next-generation hybrid roles: data scientists in test, resilience engineers, pseudo-product owners, etc.

Qualitest | enterprise QA services profile (page 4 of 4)

Case studies

Case study 1

Testing of AI

Client A global insurance provider

Business challenge

- Client introduced 2 AI solutions for
 - low cost and early reliable methods of detecting fraudulent claims
 - increase in quotation conversation rates through a next best offer
- Lacked a robust method to test the effectiveness & accuracy of the AI models

Solution

- Leveraged Qualisense.BizAssure, Qualitest's IP for AI to validate the models to measure prediction accuracy
- Leveraged model feedback for fine-tuning & replacement of algorithms
- Qualitest was originally brought in to test the AI models, but ended up productionizing the models to achieve desired business outcomes

Impact

- Effectiveness of the solution increased accuracy by 33% enabling the following business outcomes:
 - 10% reduction in fraud detection costs
 - 12% increase in online quote conversion rates

Case study 2

Engineering transformation

Client A global weather forecasting organization

Business challenge

- Low app ratings, high crash rates, and extended lack of successful releases were symptomatic of a disconnect between development and product teams
- Quality was bad leading to extended test cycles and disappearing trust from business

Solution

- Test delivery manager with strong CX background performed dual role of a communication culture change agent
- Equipped by Qualitest's workforce transformation program, played a pseudo-product owner role, building relationships between the business & development teams, influencing decisions & execution from a quality & user-first mindset
- Shifted quality left through a continuous testing approach & influenced transformation from a test-to-perform to a build-to-perform mindset

Impact

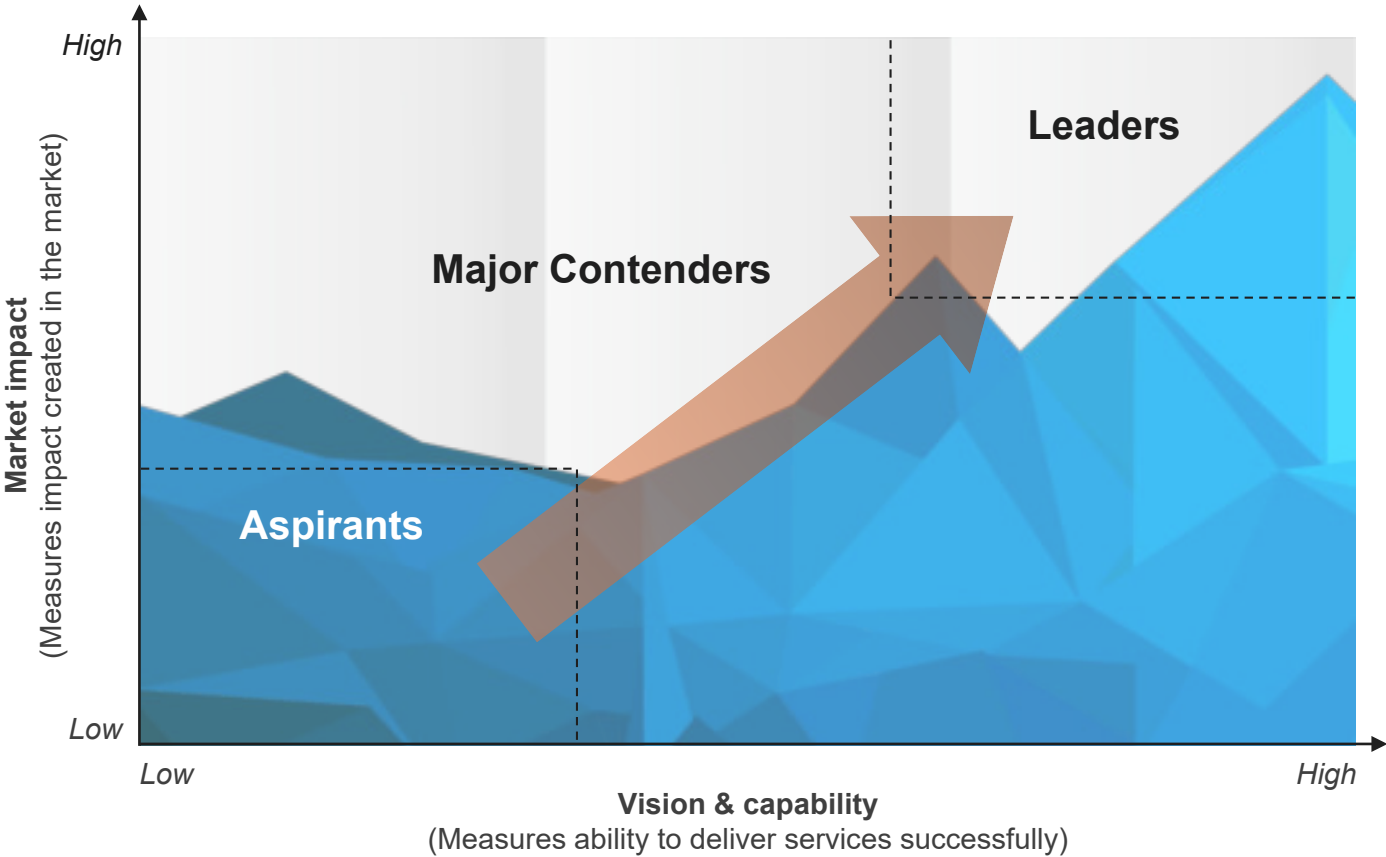
- App store ratings increased from 3.9 to 4.51 stars within 6 months
- Regression cycle duration reduced by 68%
- Crash rates reduced from 11.78% to 0.23%
- Successful weekly releases with zero production issues in 18 months & 4-fold productivity increase

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

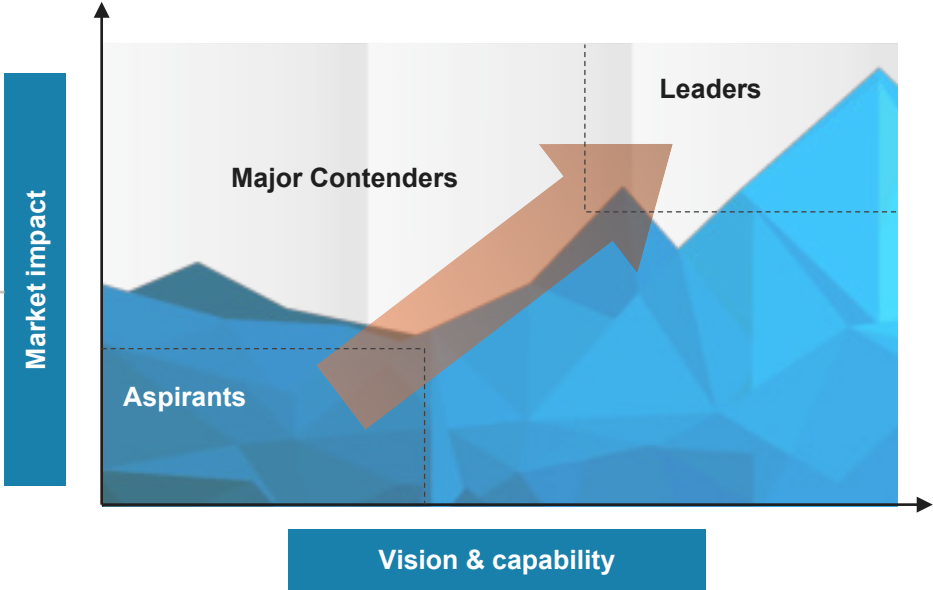
Number of clients, revenue base, YOY growth, and deal value/volume

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

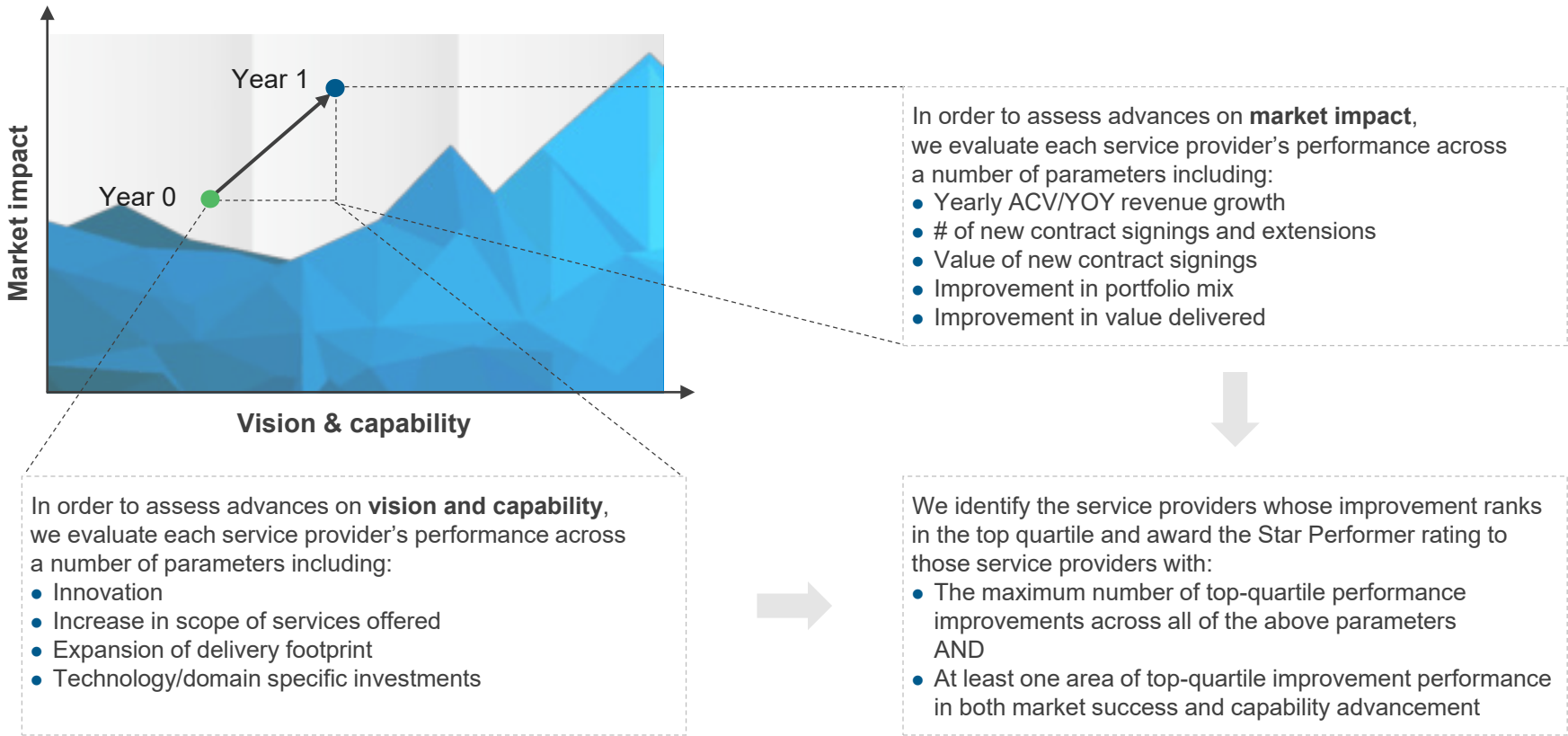
Delivery footprint and global sourcing mix



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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