

Top 20 Software Engineering Trailblazers: The DevOps Enablers

Engineering Services

Market Report – January 2018: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background of the research

Background of the research

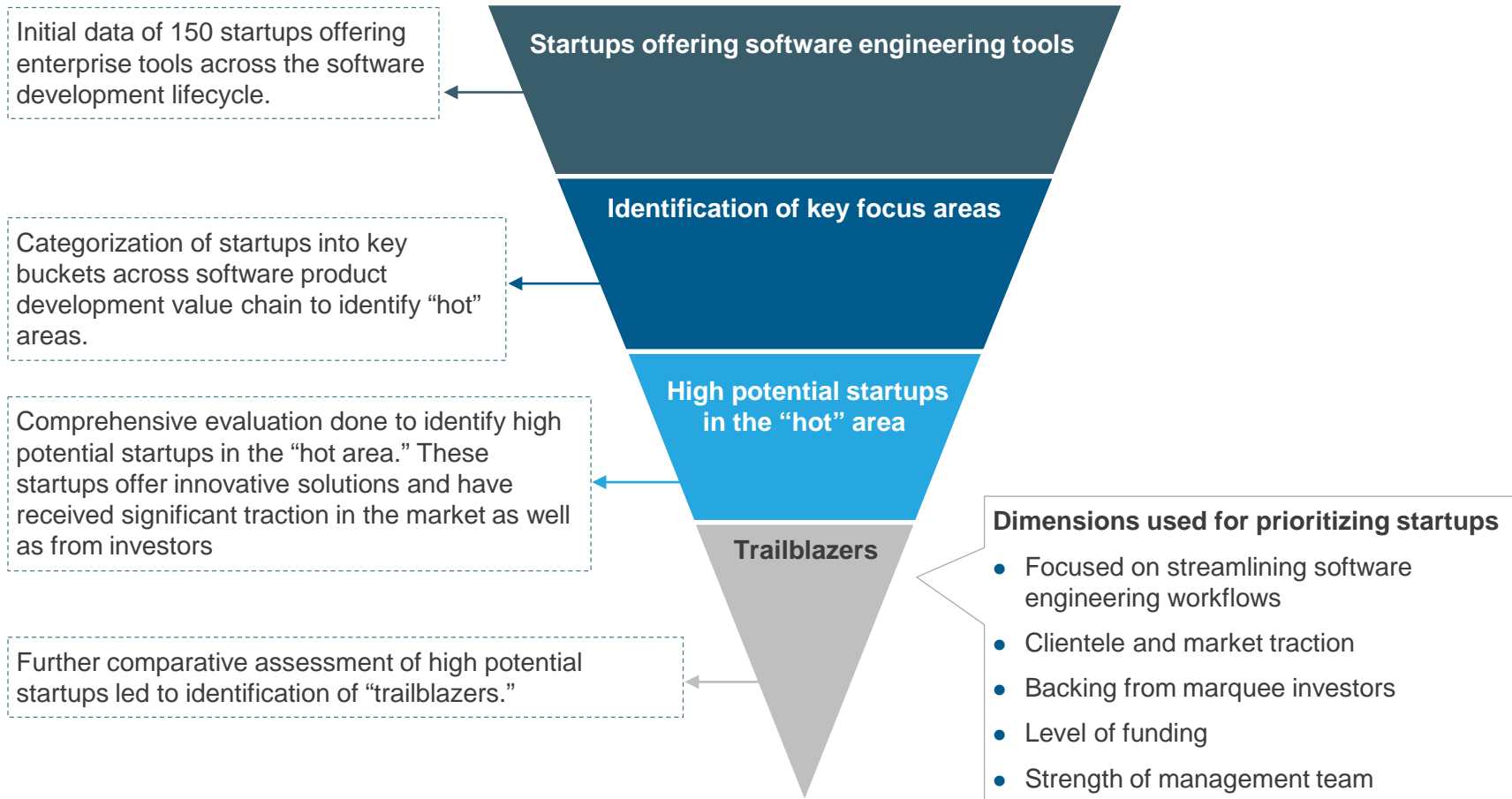
- The global technology landscape is evolving with the advent of new technology themes and the increasing focus on consumer-centric solutions. In this era of “software-defined”, software is gaining precedence for both technology vendors and enterprises to create a differentiated value proposition in the market. At the same time, software developers are grappling with factors such as increasing architectural complexity and the need to develop more intuitive software and user interfaces
- This evolving technology landscape has led to the birth of numerous startups that offer tools to facilitate enterprise adoption of new technologies and best practices. Test automation, containerization, as-a-service, and product analytics/monitoring are some of the areas witnessing significant startup activity
- Alongside the need to upgrade software products with evolving technology landscape, enterprises and technology vendors recognize time-to-market as a crucial element to reap enhanced benefits out of their software product innovations. The focus is on upgradation of software packages on a continuous basis and elimination of errors/bugs in the early stages of software development. This is driving an evolution in service delivery models and mainstream adoption of Agile and DevOps as critical enablers for efficient software delivery
- Over the past few years, multiple startups have thrived, enabling the DevOps adoption journey for enterprises. They offer tools for managing the DevOps value streams through various stages, thus accelerating enterprise DevOps adoption by eliminating the need for development of in-house toolchain
- In this research, Everest Group presents an assessment of key startups that offer enterprise-grade tools across the four stages of DevOps enablement – continuous build, continuous integration, release management, and continuous deployment
- The assessment is based on Everest Group’s rich expertise and database knowledge of the software engineering space coupled with secondary research & analysis

Scope of this report

- **Services:** Software product engineering services
- **Geography:** Global
- **Companies:** DevOps enablement startups

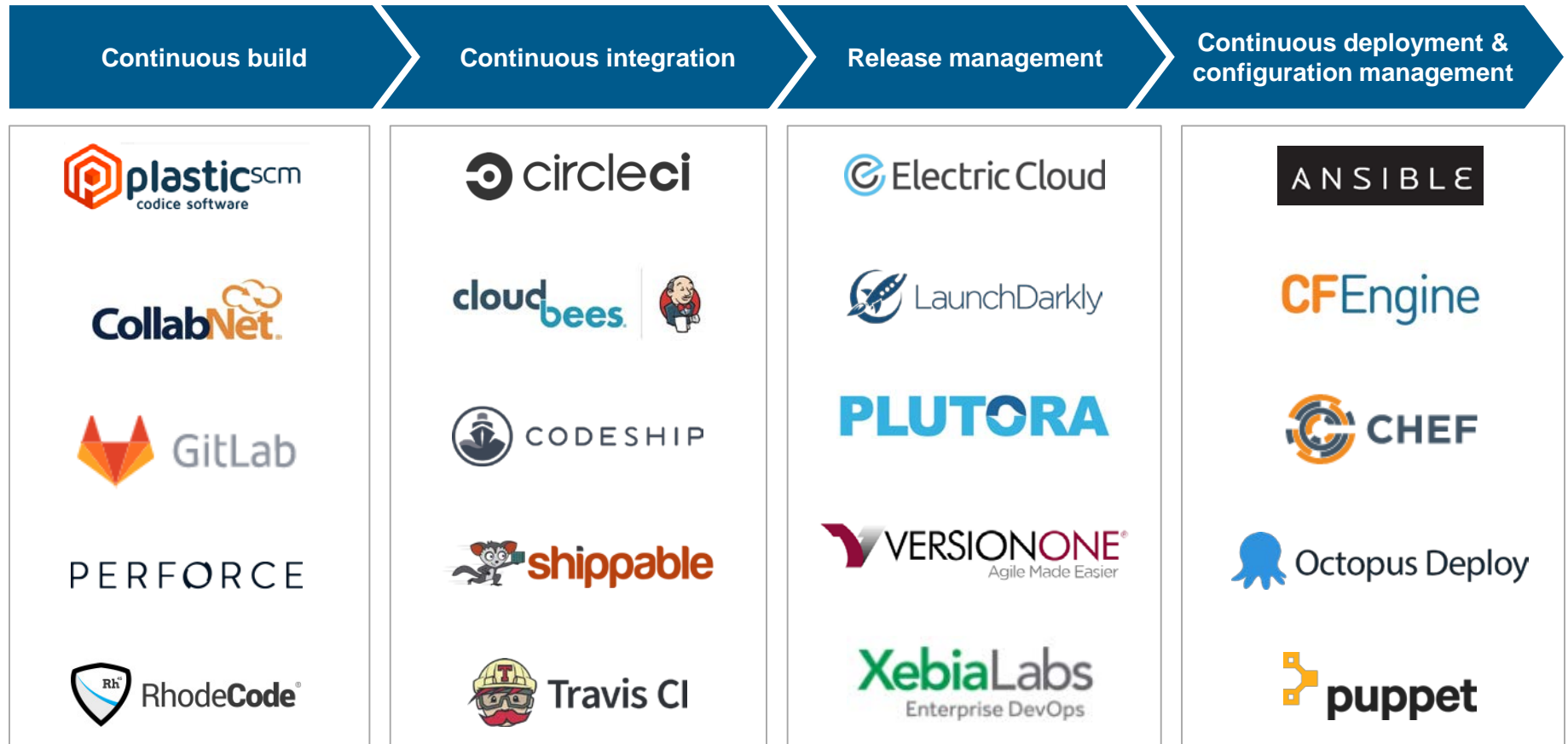
Research Methodology

Everest Group analyzed over 150 startups offering tools for various activities involved in software product engineering to identify the “hot” focus area and then assess the “Trailblazers” in that area



Source: Everest Group (2018)

After detailed assessment, DevOps enablement emerged as a “hot” focus area for software engineering startups; following 20 startups emerged as the DevOps trailblazers



Source: Everest Group (2018)

Summary of key messages



Startups establishing their significance in the technology ecosystem

- Technology companies are increasingly turning to the ecosystem for paving the path for sustainable growth
- Startups form a crucial part of this ecosystem and help enterprises accelerate their journey toward innovation and adoption of new technologies



Investment is not the only way to access innovation by startups

- Technology firms are engaging with software engineering startups via acquisitions, partnership, funding, and/or mentoring
- It is interesting to note that as compared with larger technology firms, startups are more active in acquiring other startups to plug capability gaps and gain adjacent capabilities



While enterprises are on their journey toward DevOps adoption, DevSecOps is gradually emerging as the next frontier

- Despite the increased interest in DevOps as a as critical enablers for efficient software delivery, adoption in enterprises currently remains fragmented and at project-level
- At the same time, as software engineering teams look to build more secure products, DevSecOps is emerging as a practice to reimagine security as an integral part of products intertwined into both Dev and Ops processes on a continuous basis

Source: Everest Group (2018)

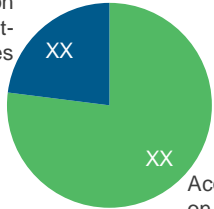
This study offers detailed assessment and profiles of 20 DevOps enablers startups; below are four charts to illustrate the depth of the report

Software engineering startup acquisition dynamics

Software engineering startup acquisition objective

2012-2017; Number of acquisitions

Acquisitions focused on acquiring net-new capabilities
100% = XX

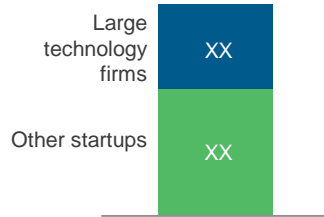


Acquisitions focused on enhancing core capabilities and acquiring adjacent capabilities

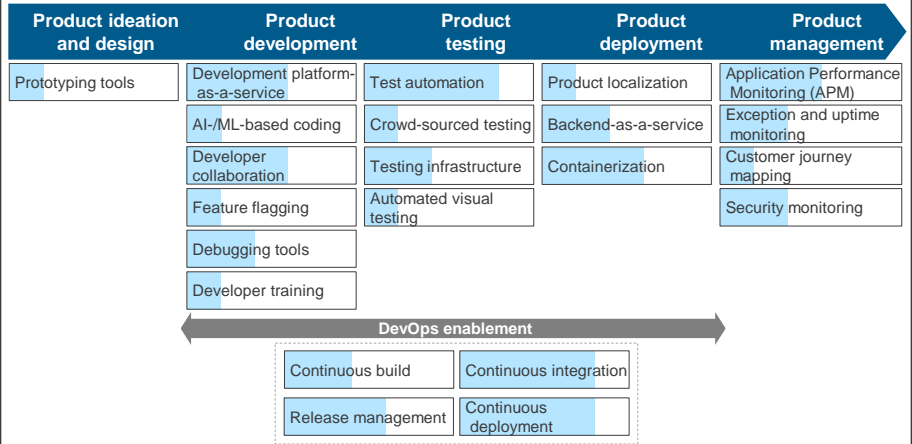
Software engineering startup acquirers

2012-2017; Number of acquisitions

100% = XX



Key focus areas for software product engineering startups



Shortlisted startups – Continuous integration

Shortlisted startups	Technology innovation	Market success	Investor confidence
Startup 1	■■■■□□	■■■■□□	■□□□□
Startup 2	■■■■□□	■■■■□□	■■■■□□
Startup 3	■■■■■■	■■■■■■	■■■■□□
Startup 4	■■■■□□	■■■■□□	■■■■□□
Startup 5	■■■■□□	■■■■□□	■□□□□
Startup 6	■■■■□□	■■■■□□	■□□□□
Startup 7	■■■■□□	■■■■□□	■■■■□□
Startup 8	■■■■□□	■■■■□□	■□□□□
Startup 9	■■■■□□	■■■■□□	■■■■□□
Startup 10	■■■■□□	■■■■□□	■■■■□□

Benefits of partnership for startups

- Larger companies provide the much-needed funding to help grow business
- Rapid access to a large customer base of established partners
- Help test new products on a large scale and get to market faster
- Help in building market credibility
- Mentorship and guidance improves success rate

Research calendar – Engineering Services (ES)

■ Published ■ Planned ▭ Current release

Flagship engineering services reports

Release date

The Evolving Demand Paradigm in the Engineering and Research and Development (ER&D) Services Industry	October 2016
Top 20 Automotive Trailblazers: The Value Chain Disruptors	October 2017
Software Product Engineering Services – Service Provider Landscape with Services PEAK Matrix™ Assessment 2017: Adapting to the New Normal	December 2017
Automotive Engineering Services – Service Provider Landscape with PEAK Matrix™ Assessment 2017	December 2017
Top 20 Software Engineering Trailblazers – The DevOps enablers	January 2018

Thematic engineering services reports

Innovation Beyond Borders – Global Talent Hotspots for Engineering Services and Research & Development (ER&D)	August 2016
In Pursuit of Product Excellence: Quality Management in the Engineering Services Industry	May 2017
Identifying the Right Partners for Quality Management in the Engineering Services Industry – Service Provider Landscape	May 2017
Designing Products in the age of Human-Machine Nexus for the Global Connected Ecosystem	June 2017
Talent Landscape in the GIC Automotive Engineering Market in India	July 2017

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Additional Engineering Services research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Software Product Engineering Services – Market Trends and Services PEAK Matrix™ Assessment: Adapting to the New Normal** ([EGR-2017-15-R-2441](#)); 2017. This report presents fact-based trends impacting the software product engineering services market, along with the assessment and detailed profiles of 18 software product engineering service providers featured on the software product engineering services PEAK Matrix
2. **Top 20 Automotive Trailblazers: The Value Chain Disruptors** ([EGR-2017-15-R-2359](#)); 2017. This report provides an assessment of digital startups primarily in the automotive landscape. It contains detailed profiles of Top 20 startups encompassing data analytics, autonomous driving, connected vehicles, and electrification areas. Each startup profile provides a comprehensive picture of its technology capabilities, market growth, and perceived investors' confidence. The research also provides a holistic overview of investments, acquisitions, and partnerships in the automotive landscape
3. **The Evolving Demand Paradigm in the Engineering and Research and Development (ER&D) Services Industry** ([EGR-2016-0-R-1977](#)); 2016. This report provides an overview of the ER&D services industry. It covers demand trends in the ER&D services industry across different industry verticals and global sourcing trends across major ER&D segments

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