



DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps!

Application Services and Cloud & Infrastructure Services
Market Report – July 2019: 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

Organizations are leveraging DevOps to improve software development and deployment cycles, deployment frequency, and the quality and relevance of software releases to enable tighter alignment with business objectives. In recent years, enterprises have been leveraging DevOps to achieve business-oriented outcomes and improve the experience for both customers and developers. Despite these developments, organizations are failing to achieve the full benefit, because they are adopting DevOps in pockets, rather than across the organization. Service providers can help enterprises to successfully implement DevOps and achieve significant business impact if they remind them of the three main principles of DevOps (automation, infrastructure and culture)

In this research, we present an assessment and detailed profiles of 20 DevOps service providers featured on the DevOps 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 DevOps services providers, client reference checks, and an ongoing analysis of the DevOps services market.

Scope of this report

- **Services:** DevOps Services
- **Geography:** Global
- **Service providers:** 20 leading DevOps services providers

This report includes the profiles of the following 20 leading digital service providers featured on the DevOps services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, DXC Technology, HCL Technologies, LTI, Mphasis, NTT Data, Softtek, and Tech Mahindra
- **Aspirants:** Aspire Systems, DMI, Microland, Sonata Software, UST Global, and Yash Technologies

Overview and abbreviated summary of key messages

This report examines the global DevOps service provider landscape and its impact on the DevOps services market. It focuses on service provider position and growth in DevOps services market, assessment of service provider delivery capabilities, and key DevOps service provider profiles. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, are:

Changing market dynamics

- DevOps is gaining traction with enterprises wherein they are using DevOps to drive technical as well as business oriented outcomes. They have been leveraging DevOps as a key driver for their portfolio transformation and application modernization initiatives
- Enterprises are engaging with multiple services providers for enabling different technical and no-technical aspects of DevOps

Emerging service provider trends

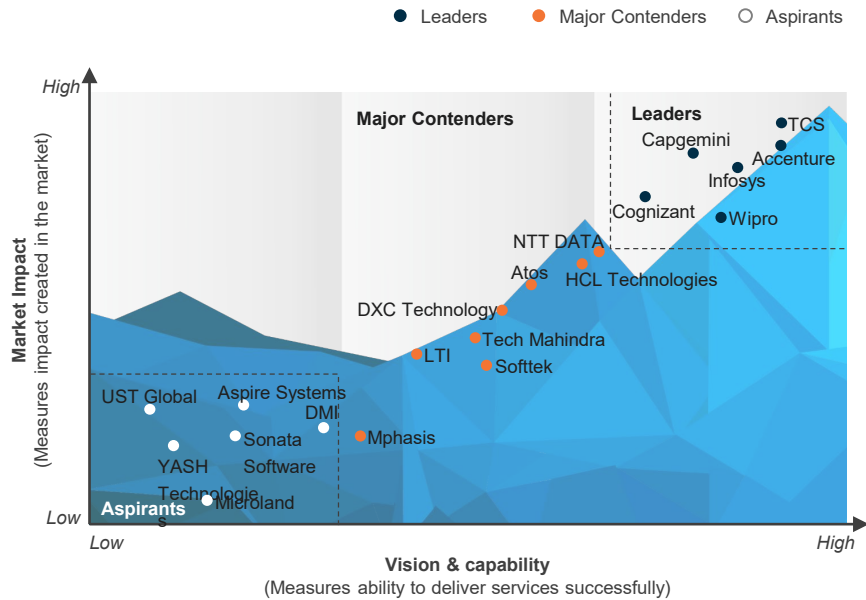
- Leading service providers are leveraging AI to make substantial business impacts and helping enterprises enable enhanced stakeholder and developer experience by incorporating a feedback mechanism in the DevOps lifecycle
- Some service providers have developed elaborate frameworks to help enterprises navigate challenges like change management, maturity assessment and upskilling of talent

Service provider delivery capability

- DevOps service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Capgemini, Cognizant, Infosys, TCS, and Wipro are the current Leaders in the global DevOps services market. However, several service providers are emerging as Major Contenders

This study provides an assessment of the leading providers of DevOps services

Assessment of DevOps Service Providers



Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information that is contract-specific will be presented back to the industry only in an aggregated fashion
 Source: Everest Group (2019)

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation & investments	Delivery footprint	Vision & strategy	Overall
Service provider 1	High	High	High	High	High	High	High	High	High
Service provider 2	Low	High	High	High	Low	High	High	High	High
Service provider 3	Low	High	High	High	High	High	High	High	High
Service provider 4	Low	High	High	High	High	High	High	High	High
Service provider 5	High	High	High	High	High	High	High	High	High
Service provider 6	High	High	High	High	High	High	High	High	High
Service provider 7	High	High	High	High	High	High	High	High	High
Service provider 8	High	High	High	High	High	High	High	High	High
Service provider 9	Low	High	High	High	High	High	High	High	High

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

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

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

Research calendar – Application Services

■ Published ■ Planned ▭ Current release

Flagship Application Services reports

Release date

Application Services – Annual Report 2018: The Future of Architecture is Intelligent	June 2018
GDPR Services: Gross Disconnect in Perception and Reality – Services PEAK Matrix™ Assessment 2018	June 2018
Application Automation Services PEAK Matrix™ Assessment and Market Trends 2019: AI Alone Won't Help – Align Strategy to Realize Benefits	Feb 2019
Application Services – Annual Report 2019: Balancing The Legacy And New Applications	June 2019
DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps!	July 2019
Workday Services PEAK Matrix™ Assessment and Market Update	Q3 2019
Cloud ERP Services PEAK Matrix™ Assessment and Market Update	Q3 2019

Thematic Application Services reports

Upcoming Contract Renewals – Application Services 2018	February 2018
The Great Digital Divide: Is Customer Dissatisfaction the New Normal?	March 2018
Closing the Gap - The Future of IT Skills in the United States	April 2018
Reimagining Enterprise IT Services Sourcing	May 2018
Upcoming Contract Renewals - Application Services 2019	January 2019
Assuring Trust in a Converging Life Sciences Ecosystem: The Emerging Role of Quality Assurance	February 2019
Pinnacle for app modernization	Q3 2019

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Research calendar – Cloud and Infrastructure Services (CIS)

Published
 Planned
 Current release

Flagship CIS reports

Release date

Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience	June 2019
DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps!	July 2019
Cloud and Infrastructure Services Annual Report 2019	Q3 2019
Next-generation Infrastructure Services for Insurance PEAK Matrix™ Assessment 2019 and Market Trends	Q3 2019
Next-generation Infrastructure Services for BFS – PEAK Matrix™ Assessment 2019 and Market Trends	Q3 2019
Digital Workplace Services Trailblazers	Q3 2019
Cloud Services PEAK Matrix™ Assessment 2019 and Market Update	Q4 2019
Next-generation Network Transformation Services PEAK Matrix™ Assessment 2019 and Market Trends	Q4 2019

Thematic CIS reports

Upcoming Contract Renewals – Infrastructure Services	January 2019
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2019
Viewpoint – The Rise of Edge	February 2019
Viewpoint – Security Operations for the Digital World	Q3 2019
Big Tech Wars – Artificial Intelligence Platforms	Q3 2019
Viewpoint - Workplace Services: SLA is Dead; Long Live SLAs	Q4 2019

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Additional Application Services and Cloud & Infrastructure 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. **Application Automation Services PEAK Matrix™ Assessment and Market Trends 2019: AI Alone Won't Help – Align Strategy to Realize Benefits** ([EGR-2019-32-R-3080](#)); 2019. This research focuses on application automation services and includes a market study of application automation services. In this research, we present an assessment and detailed profiles of 19 application automation service providers featured on the application automation services PEAK Matrix™
2. **Digital Workplace Services– Market Trends and PEAK Matrix™ Assessment 2019: “Enterprises, It is Time to Humanize the Workplace Experience”** ([EGR-2018-29-R-2659](#)): In this report, we discuss the hitherto overlooked role of empathy in the workplace, and how a humanized workplace – backed by technology – stands to deliver sustainable productivity and experience benefits. This report provides a market trend assessment of digital workplace services, along with detailed profiles and assessment of 21 IT service providers featured on Everest Group's PEAK Matrix for digital workplace services

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