Everest Group PEAK Matrix™ for DevOps Service Providers 2019

Focus on Capgemini

September 2019

Everest Group®

PEAK MATRIX™

Introduction and scope

Everest Group recently released its report titled "DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps! " This report analyzes the changing dynamics of the DevOps services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 20 service providers on the Everest Group PEAK Matrix™ for DevOps services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of DevOps service providers based on their absolute market success and delivery capability.

Based on the analysis, **Capgemini emerged as a Leader**. This document focuses on **Capgemini's** DevOps services experience and capabilities and includes:

- Capgemini's position on the DevOps PEAK Matrix
- Detailed DevOps services profile of Capgemini

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Everest Group®
RESEARCH

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

DevOps services PEAK Matrix™ characteristics

Leaders:

Accenture, Capgemini, Cognizant, Infosys, TCS, and Wipro

- The Leaders have a strong focus on enabling a DevOps culture and change management within the organization. They are actively moving away from the siloes construct towards a collaborative environment between developers, operations, and the business teams to drive business outcomes
- Leaders are extensively exploring futuristic solutions in DevOps, leveraging technologies like AI, ML, and blockchain to come up with innovative solutions

Major Contenders:

Atos, DXC Technology, HCL Technologies, LTI, Mphasis, NTT Data, Softtek, and Tech Mahindra

- Major Contenders are focusing on improving their capabilities by leveraging Infra-as-code, microservices, containers, and advanced automation services
- Major Contenders are extensively partnering with different players in the ecosystem to plug gaps in their DevOps portfolio and enhance capabilities

Aspirants:

Aspire Systems, DMI, Microland, Sonata Software, UST Global, and Yash Technologies
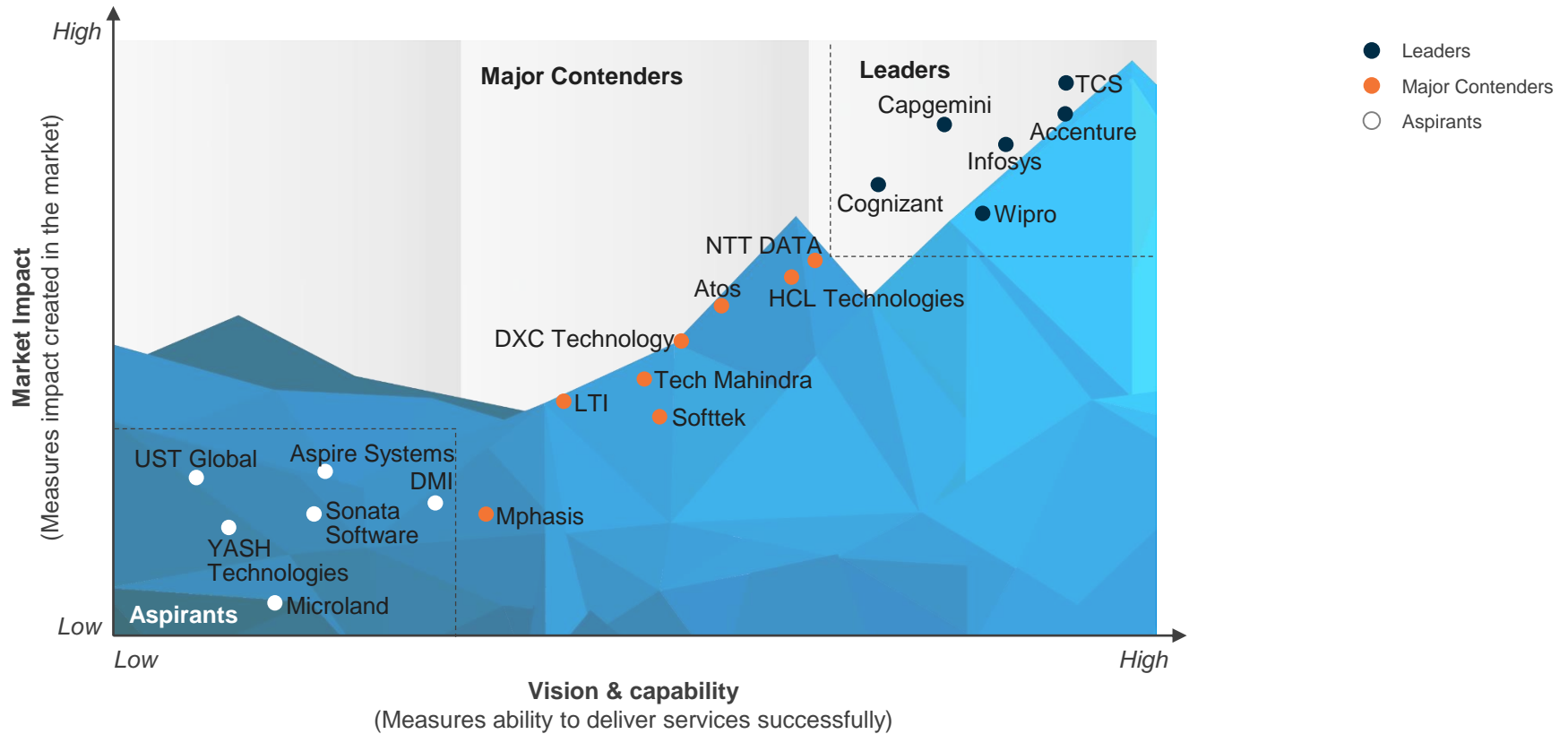
- Aspirants have developed niche capabilities across one or more processes in the DevOps lifecycle and hence focus on winning smaller deals
- Aspirants are avidly investing in augmenting capabilities and services offering portfolio through partnerships

Everest Group®
RESEARCH

DevOps Services PEAK Matrix™ Assessment 2019 | Capgemini positioned as Leader

Everest Group®
PEAK MATRIX™

Everest Group DevOps Services PEAK Matrix™ Assessment 2019

High

Market Impact
(Measures impact created in the market)

Major Contenders

Leaders

Legend:
- ● Leaders
- ● Major Contenders
- ○ Aspirants

TCS
Capgemini
Accenture
Infosys
Cognizant
Wipro
NTT DATA
Atos
HCL Technologies
DXC Technology
Tech Mahindra
LTI
Softtek
UST Global
Aspire Systems
DMI
Sonata Software
YASH Technologies
Mphasis
Microland

Aspirants

Low

Low — High

Vision & capability
(Measures ability to deliver services successfully)

Source: Everest Group (2019) ``

Everest Group®
RESEARCH

Capgemini | DevOps services profile (page 1 of 2)
Overview

Strengths	Areas of improvement
• Capgemini has a well articulated DevOps vision encompassing organizational design, culture, architecture, process, and automation • It has a wide range of DevOps solutions – developed internally and offered through partnerships – cater to unique enterprise demands across low to high levels of DevOps maturity	• Capgemini is perceived as an expensive provider for DevOps with limited flexibility in contracts; needs to revamp its pricing strategy to be able to compete strongly with peers • There is scope for improvement in mining existing infrastructure and application services accounts for DevOps engagements by proactively promoting proofs of concept focused at business outcomes

Vision
Capgemini believes that DevOps is the core enabler of IT agility. It wants to enable application development, maintenance, quality engineering, security, and operations teams to collaborate and deliver software at the speed at which the business needs using DevOps principles.
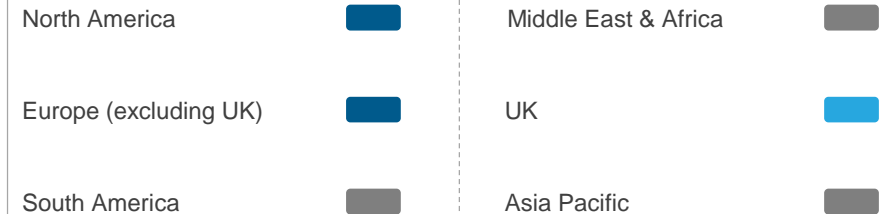

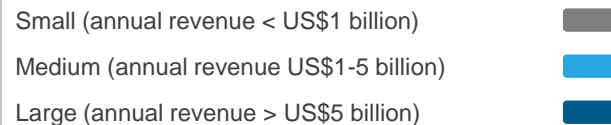**Percentage of projects by industry** — High (>20%), Medium (10-20%), Low (<10%)

Industry	Level	Industry	Level
BFSI	High	Electronics, hi-tech, & technology	Medium
Energy and utilities	Low	Healthcare and life sciences	Medium
Manufacturing	Low	Retail, distribution, and CPG	Low
Public sector	Low	Telecom, media, and entertainment	Medium
Travel & transport	Low	Others	Low

Percentage of projects by geography — High (>25%), Medium (10-25%), Low (<10%)

Geography	Level	Geography	Level
North America	High	Middle East & Africa	Low
Europe (excluding UK)	High	UK	Medium
South America	Low	Asia Pacific	Low

Percentage of projects by buyer size — High (>40%), Medium (20-40%), Low (<20%)

Buyer size	Level
Small (annual revenue < US$1 billion)	Low
Medium (annual revenue US$1-5 billion)	Medium
Large (annual revenue > US$5 billion)	High

Percentage of projects by function — High (>20%), Medium (10-20%), Low (<10%)

Function	Level
DevOps strategy & consulting only	Medium
DevOps enablement services	Medium
DevOps managed services	High

Everest Group® RESEARCH
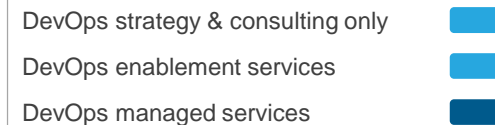
Offerings

Proprietary solutions (representative list)	
Solution name	**Details**
DevOps in a box	A set of preconfigured CI/CD pipeline templates that support end-to-end orchestration for Java, .NET, Mainframe, ETL, containers, and packaged app- (Guidewire) based workload. These templates helps in application onboarding after incorporating customizations as per client needs
SMARTQA™	An integrated testing platform that delivers capabilities of workflow management for all testing activities; supports the existing toolset to provide an enclosed layer for automation, test data, DevOps enablement, on-demand environments, and analytics-based decisions on quality coverage
Organizational Change Management (OCM) Toolkit	Framework used extensively for Agile and DevOps adoption, consisting of an Organization Risk & Readiness Assessment (ORRA) Tool to identify, quantify/qualify, prioritize, and mitigate risks that are associated with all changes, and 7 Change Management Workstream, with seven features for strategy review, analysis and validation, branding, leadership alignment, organizational readiness, communications, and learning

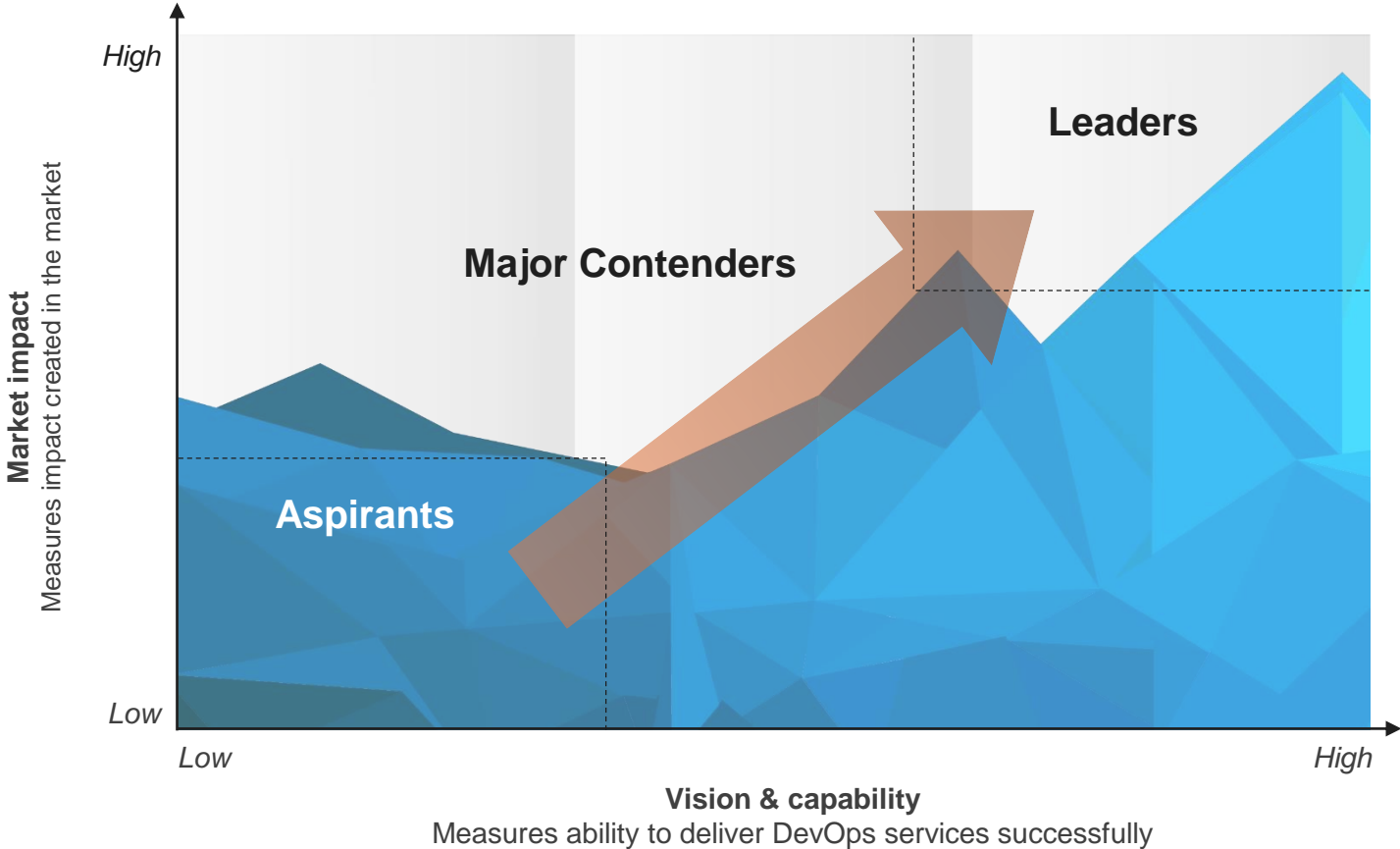| DevOps services partnerships (representative list)	
Partner name	**Details**
Compuware	Supports mainframe DevOps that helps in building the continuous integration and continuous deployment pipeline for mainframe-based workloads
Electric Cloud	Integrated tool for continuous integration and continuous deployment along with analytics from the DevOps pipeline

DevOps services investments (representative list)	
Investment theme	**Details**
DevOps lab	DevOps labs are set up in development centers in multiple countries – India, France, the Netherlands, Germany, the UK, Italy, Poland, Morocco, the US, China, Brazil, and Australia – to develop accelerators and IP using a mix of mature open source and COTS tools
Communities of Practice	Formed to encourage employees from across the organization to collaborate in the form of Slack channels and Yammer communities; also includes internally and externally hosted hackathons, as well as chapters and guilds to allow employees to find their next assignments based on areas of interest
Trainings & Certifications	Internal certifications covering various skill levels across different topics in DevOps are offered through a learning & development program. External partner organizations for certification include DevOps Institute, AWS, Google, and Pivotal

Everest Group®
RESEARCH

Appendix

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

Everest Group PEAK Matrix

Market impact
Measures impact created in the market

High

Low

Leaders

Major Contenders

Aspirants

Low   High

Vision & capability
Measures ability to deliver DevOps services successfully

Services PEAK Matrix™ evaluation dimensions

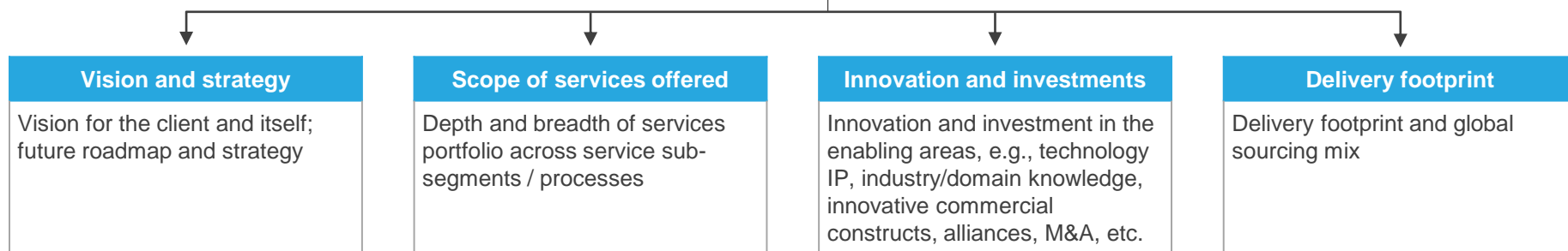Measures impact created in the market – captured through three subdimensions

Market adoption

No. of clients, revenue base, and YOY growth, deal value/volume

Portfolio mix

Diversity of client/revenue base across geos and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact

Market impact

Leaders

Major Contenders

Aspirants
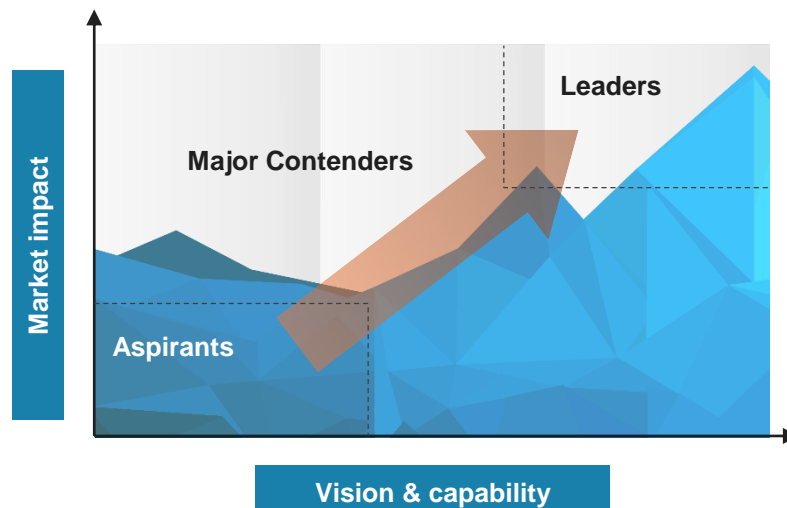
Vision & capability

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 sub-segments / 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

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

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765

Stay connected

Website

www.everestgrp.com

Social Media
@EverestGroup
@Everest Group

Blog

www.everestgrp.com/blog/