Everest Group PEAK Matrix™ for DevOps Service Providers 2019

Focus on TCS

July 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, **TCS emerged as a Leader**. This document focuses on **TCS'** DevOps services experience and capabilities and includes:

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

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.
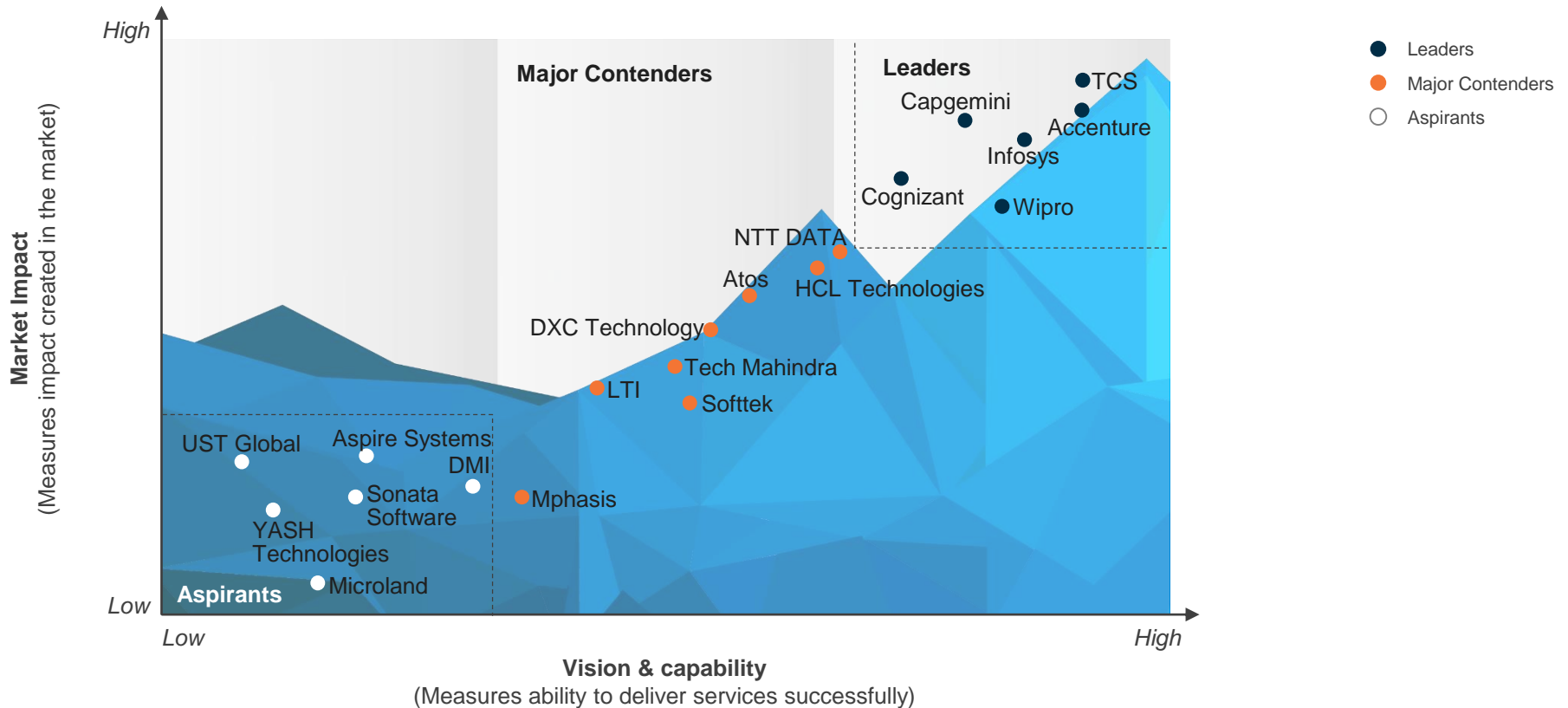
Source: Everest Group (2019) unless cited otherwise

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R E S E A R C H

Everest Group PEAK Matrix™
DevOps Services PEAK Matrix™ Assessment 2019 |
TCS positioned as Leader

Everest Group DevOps Services PEAK Matrix™ Assessment 2019

Overview

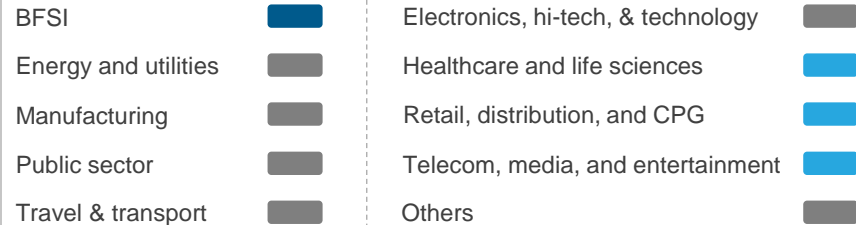| Strengths |
|---|
| • Clients cite TCS' willingness to work in a co-innovation model, its in-depth domain knowledge, and highly skilled onshore talent as key strength areas |
| • TCS has made credible investments in upskilling its employees around DevOps and making them project-ready |

Areas of improvement
• TCS needs to increase its leverage of next-generation technologies such as AI and ML within DevOps to continue to differentiate itself
• Clients say that, in addition to its good domain knowledge, TCS needs to improve its business content knowledge

Vision
TCS' DevOps service strategy is built on a consulting-led enterprise agile and DevOps implementation. This approach is supported by its strong focus on organization change management, enabling culture and mindset changes needed for Agile/DevOps adoption
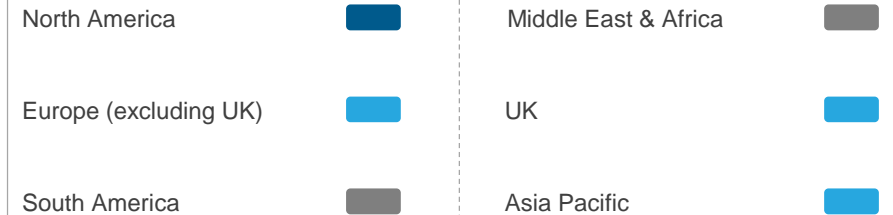
Percentage of projects by industry
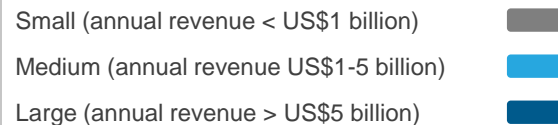High (>20%) | Medium (10-20%) | Low (<10%)

BFSI	High	
Electronics, hi-tech, & technology	Low	
Energy and utilities	Low	
Healthcare and life sciences	Medium	
Manufacturing	Low	
Retail, distribution, and CPG	Medium	
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%)

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

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

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%)

DevOps strategy & consulting only	High
DevOps enablement services	High
DevOps managed services	High
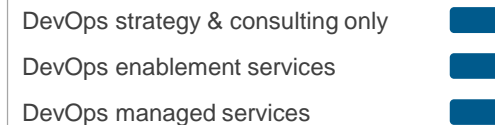
Proprietary solutions (representative list)

Solution name	Details
Jile™	A cloud-based product which helps teams implement agile & DevOps methodologies
MasterCraft DevPlus™	An integrated platform for managing agile and traditional development encompassing build automation, test automation, and deployment automation
MasterCraft TransformPlus™	Helps organizations accelerate their application development velocity through automated code generation

DevOps services partnerships (representative list)

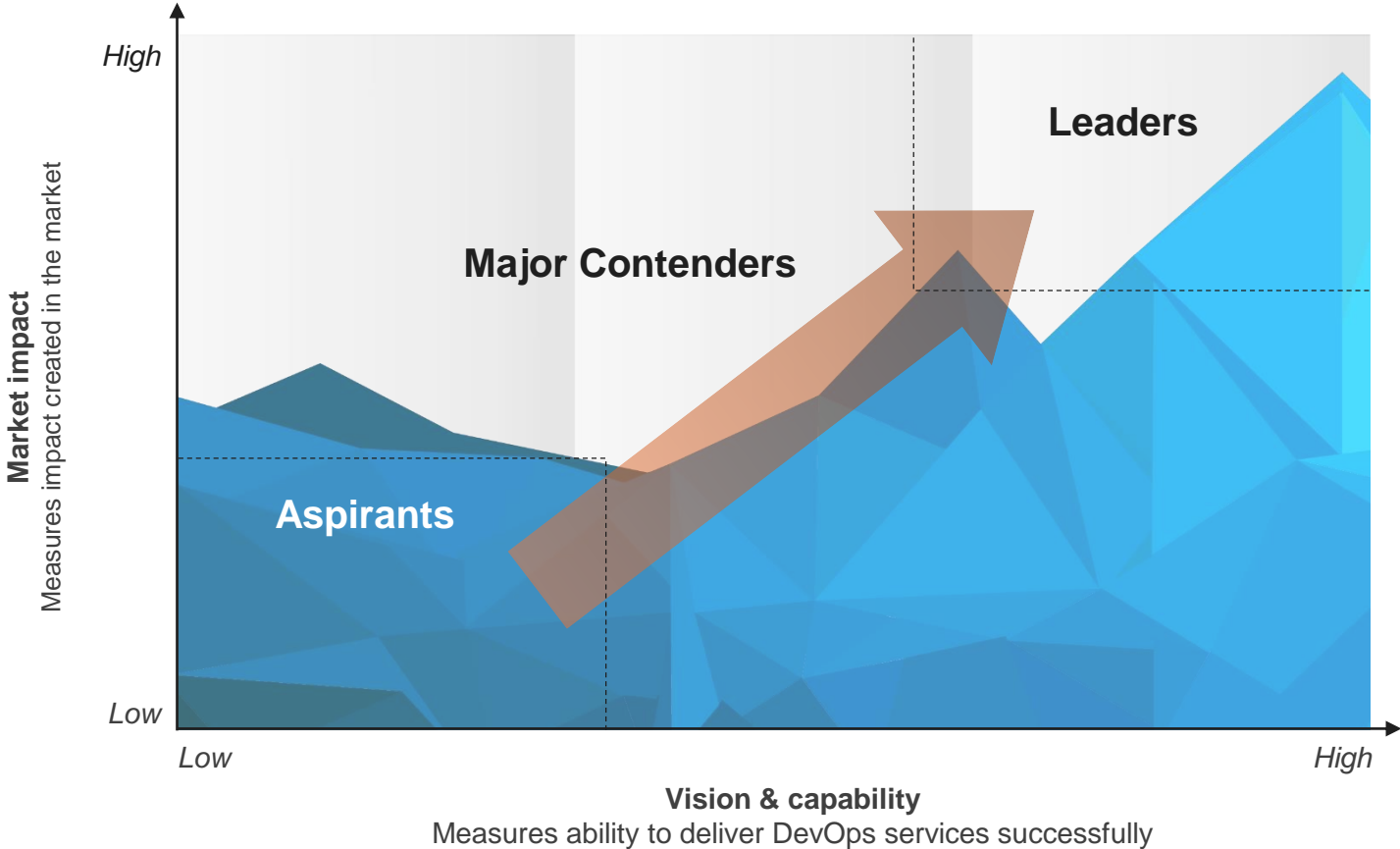| Partner name	Details
Scaled Agile Inc. (SAI)	TCS' partnership with SAI provides support for various DevOps-related activities such as culture, automation, lean flow, measurement, and recovery. The partnership is also equipped to deliver DevOps training and certification, in-house and to clients as needed
AWS ECS	This partnership enables a high-performance container orchestration service that supports Docker containers
Veracode	The partnership enables TCS to provide joint solutions for its customers as it assesses and improves the security of applications from inception through production

DevOps services investments (representative list)

Investment theme	Details
DevOps R&D (including patents)	TCS has 300 research and innovation resources dedicated to DevOps; their focus is tools, technologies, and products
Innovation Forums	TCS' Co-Innovation Network (COIN™) brings together resources from the industry, academia, start-ups, customers, and employees to generate innovative solutions
Tools	TCS has invested in digitizing the DevOps assessment framework and adding cognitive abilities to the framework

Appendix

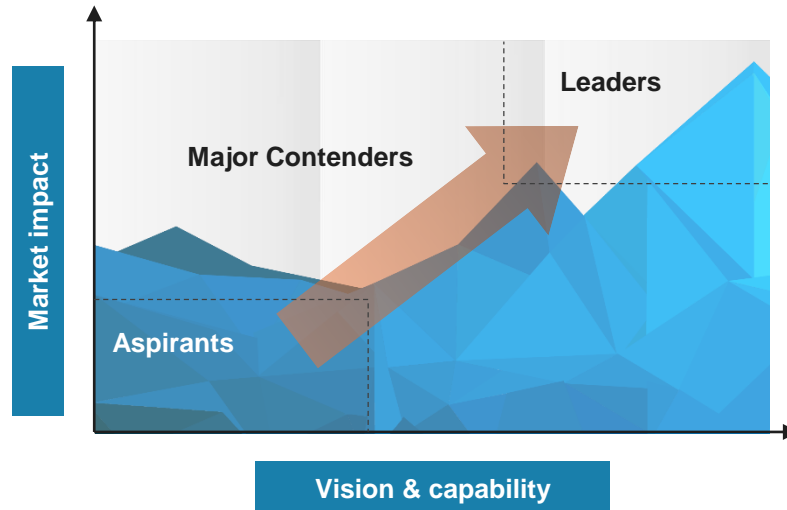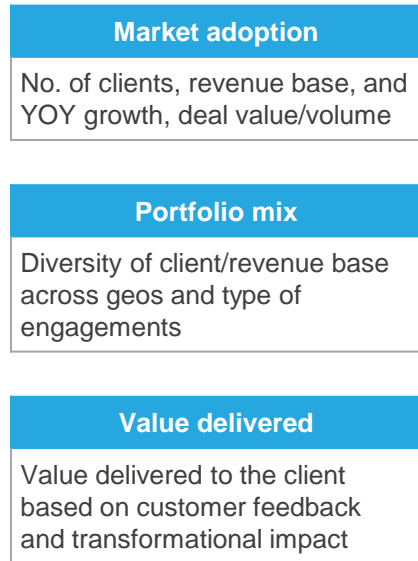# Everest Group PEAK Matrix™ is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix

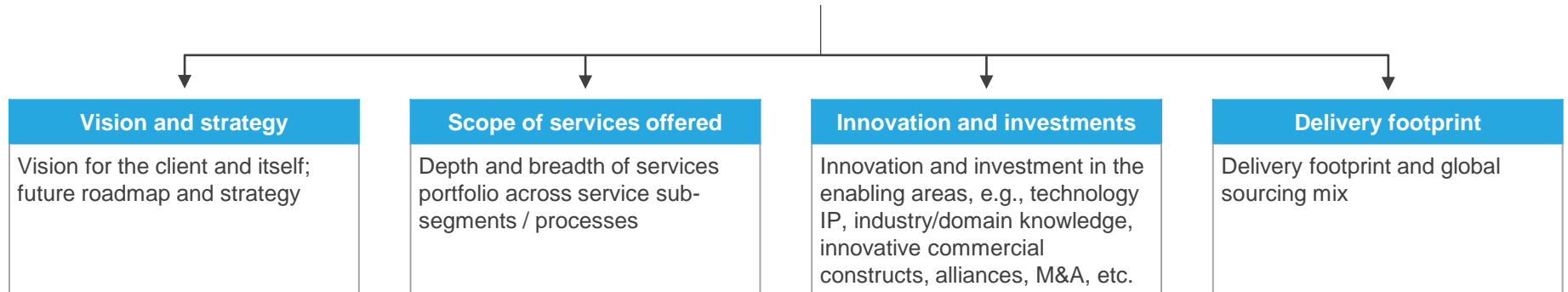**Leaders**

Major Contenders

Aspirants

Market impact
Measures impact created in the market

High

Low

Low

Vision & capability
Measures ability to deliver DevOps services successfully

Low   High

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 (vertical axis)

Vision & capability (horizontal axis)

Aspirants · Major Contenders · Leaders

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.

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