

Cloud-Native Application Development Services PEAK Matrix[®] Assessment 2020

August 2020: 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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For more information on this and other research published by Everest Group, please contact us:

Yugal Joshi, Vice President

Alisha Mittal, Practice Director

Ankit Gupta, Senior Analyst

Prasun Dey, Senior Analyst

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Background of the research

Organizations are leveraging cloud-native application development techniques to improve software development and deployment cycles, deployment frequency, and the quality and relevance of software releases to enable better alignment with business objectives. These techniques have significantly supported both application end users and the application developers themselves. While enterprises' application landscape continues to be dominated by monolithic and legacy systems, new applications built on cloud-native principles have helped enterprises respond to customer needs and changing business scenarios more efficiently and quickly.

This report examines the dynamics of the global cloud-native application development service provider landscape. We present an assessment of 21 cloud-native application development service providers featured on the cloud-native application development services PEAK Matrix®.

This report includes the remarks on key strengths and areas of improvement for the following 21 leading cloud-native application development service providers featured on the cloud-native application development services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Brillio, Capgemini, CSS Corp, DXC Technology, LTI, Mphasis, NTT DATA, Softtek, Sopra Steria, and Virtusa
- **Aspirants:** Aspire Systems, DMI, Happiest Minds, Sonata Software, and Zensar

Scope of this report:



Geography
Global



Service providers
21 leading cloud-native application development service providers



Services
Cloud-native application development services

Overview and abbreviated summary of key messages

This report examines the global cloud-native application development service provider landscape. It focuses on service provider position, assessment of their delivery capabilities, and key strengths and areas of improvement of cloud-native application development service providers

Some of the findings in this report, among others, are:

Service provider delivery capability

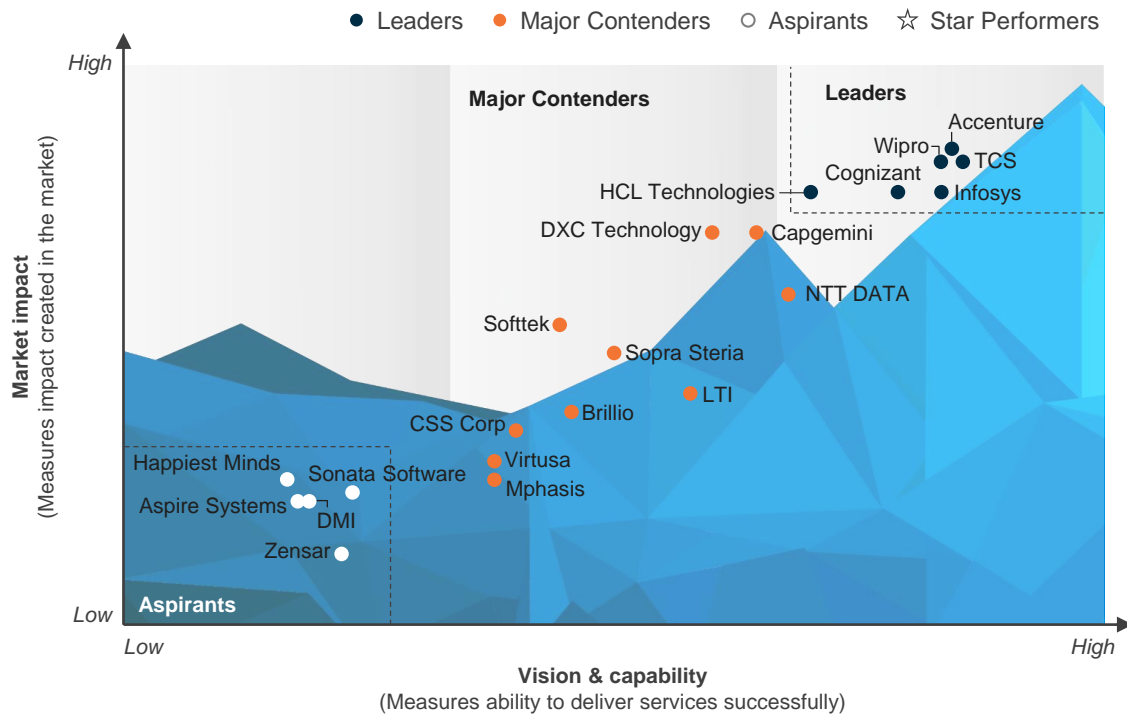
- Cloud-native application development service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Cognizant, HCL Technologies, Infosys, TCS, and Wipro are the current leaders in the global cloud-native application development market. However, several service providers are emerging as major contenders

Service provider characteristics

- Leaders have exhibited strong client orientation and have helped their clients in the development of complex business-critical applications to achieve faster time to value and enhanced user experience
- Leaders have made significant investments in building IPs and partnerships to accelerate the application development process and deliver custom solutions to clients
- Major Contenders have exhibited a high degree of responsiveness to client requirements and have supported clients in building strategy and prospective business cases
- Major Contenders have been able to develop sophisticated applications and are extensively leveraging partnership network to fill capability gaps
- Aspirants are either focused on a region(s) or vertical(s), or currently have relatively small cloud-native application development practice
- While Aspirants are limited by scale to cater to the requirements of large global players, they have been collaborating with clients and other service providers to drive innovation and value through their niche capabilities

This study offers four distinct chapters providing a deep dive into key aspects of cloud-native application development market; below are three charts to illustrate the depth of the report

Cloud-Native Application Development Services PEAK Matrix® Assessment 2020^{1,2,3}



Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

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

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	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○

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

1 PEAK Matrix specific to cloud-native application development services
 2 Assessment for Mphasis includes partial inputs from the service provider, and is based on Everest Group's estimates that leverage its proprietary data assets, service provider public disclosures, and interaction with buyers
 3 Assessment for Capgemini excludes service provider inputs on this particular study and is based on Everest Group's estimates
 Source: Inputs from market players, recruitment firms, and investment agencies

Research calendar

Application Services

■ Published
 ■ Planned
 ■ Current release

Flagship application services reports

	Release date
Application Transformation Services PEAK Matrix® Assessment 2020	December 2019
Application Transformation – Business Pioneering the Agenda – State of the Market	February 2020
Next-generation Quality Assurance – State of the Market	February 2020
Cloud-Native Application Development Services PEAK Matrix® Assessment 2020	August 2020
Application Services State of the market	Q3 2020
Cloud-Native Application Development Service Provider Compendium	Q3 2020
Cloud-Native Application Development Services State of the market	Q4 2020
Next-gen Application Management Services PEAK Matrix® Assessment 2020	Q4 2020

Thematic application services reports

	Release date
Breakthrough Transformation	October 2019
Talent Readiness for Next-generation IT Services PEAK Matrix® Assessment 2020 – Closing the Demand-Supply Gap	December 2019
Upcoming Contract Renewals – Application Services 2020	March 2020
Rapid Application Development Platform Trailblazers: Top 14 Start-ups in Low-code Platforms – Taking the Code Out of Coding	May 2020
Strength in Adversity: Enterprise Service Resilience During the COVID-19 Crisis	June 2020
Winning the War for Talent: An Enterprise Guide to Building a Sustainable Workforce Strategy	July 2020
Cloud-based Application Modernization	July 2020

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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

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