

IDC Innovators

IDC Innovators: Agile Code Development Technologies, 2018

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THIS IDC INNOVATORS EXCERPT FEATURES: GITLAB

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC Innovators: Agile Code Development Technologies (Doc #US43675318).

Why GitLab Was Chosen as an IDC Innovator

GitLab is another success story of a CI/CD technology that was initially released by a single developer, Dmitry Zaporozhets, in 2011. The project quickly picked up speed as a community effort. GitLab was established in 2014 and today has secured over \$40 million in start-up funding. The technology is widely used in the industry today.

GitLab		
 Founded 2014	 Number of Employees 248	 Headquarters San Francisco, CA
 Product Name GitLab	 Founders Sid Sijbrandij and Dmitry Zaporozhets	 Typical Deal Size 1,000 to 10,000+ seat enterprise deals
 Profiled Product/ Service GitLab is a CI/CD solution available in an OSS community edition, a SaaS, and a software subscription product.	 Funding \$1.5 million in 2015, Series A (2015): \$4 million, Series B (2016): \$20 million, and Series C (2017): \$20 million	 Geographic Mix (revenue share by major region) Majority in North America, less share in Western Europe, and some in Asia/Pacific

IDC Innovator Assessment

- GitLab positions its product as a solution that delivers capabilities for the full DevOps life cycle, including planning and creation, verification, packaging, release, configuration, and operational monitoring.
- GitLab is an OSS solution available in a free community and in a series of commercial versions designed for large enterprise needs such as integrating static and dynamic code analysis into the life cycle.
- Cloud Native Computing Foundation cites GitLab as one of the top 30 projects with the highest velocity, and metrics show over 1,900 project contributors; 200 contributors have delivered 10 or more commits.

Key Differentiator

GitLab's OSS development model ensures transparency to the community for product development strategy and road map plans. The larger open source developer community has embraced this technology, leading to a large set of project contributors. GitLab has a strong history of releasing new features and functions every month and has done so for the past 78 months. Customers today include technology providers such as IBM, SanDisk, Red Hat, Intel, and Alibaba.com as well as end-user organizations such as ING, Bayer, Sony, Freddie Mac, Nasdaq, Cern, NASA, Lockheed Martin, AT&T, and Verizon.

Challenges

As is the case for other DevOps competitors, the relative immaturity of the DevOps market, the crowded landscape of vendors and projects, and the fast-moving nature of organizations' transition to embrace DevOps are collectively creating an environment where some solutions are not well integrated. Although GitLab offers integrations, there are likely products and technologies in use by enterprise customers that are not currently integrated with GitLab and therefore create some adoption challenges.

IDC INNOVATORS IN AGILE CODE DEVELOPMENT TECHNOLOGIES

Embracing a DevOps practice means an organization must dramatically accelerate its development practices, moving from a classic monolithic software design model to a more modular design point with clear delineations between software components. This approach allows organizations to life-cycle each portion of code individually, leading to a more rapid update process that can be measured in weeks, days, or even potentially in hours. The theoretical end game is a true microservices design point, which may be practical for Google or Twitter but may be harder to achieve by enterprises that are only today transitioning from waterfall to agile processes. Part of the agile development process means creating an end-to-end tool chain that may be based on a single solution but will usually incorporate technologies from a variety of other vendors and open source software projects. The start-ups discussed in this IDC Innovators document are key players in an end-to-end DevOps tool chain.

TECHNOLOGY DEFINITION

A DevOps practice combines modern operational practices that optimize for agile development connected to a fast-deploy, fast-fail, fast-recovery operational model. Building such a fast-moving process depends on a broad set of tools that collectively constitute a DevOps tool chain.

Agile code development technologies are the software products that collectively help an organization assemble a continuous integration/continuous delivery pipeline and include collaborative enablement, repository management, automated build, testing, version control, and operational controls.

IDC INNOVATORS INCLUSION CRITERIA

An "IDC Innovators" document recognizes emerging vendors chosen by an IDC analyst because they offer an innovative new technology or a groundbreaking business model, or both, and were approved by the IDC Innovators Review Panel. It is not an exhaustive evaluation of all companies in a segment or a comparative ranking of the companies.

An IDC Innovators document highlights vendors that meet the following criteria:

- In IDC's opinion, the company exhibits innovative technology or a new business model.
- The company has annual revenue <\$100 million at the time of selection.
- Customers are currently using the company's products and services (i.e., the products and services are not conceptual or in the process of being released).
- The product, service, or business model must solve or help to alleviate an IT buyer challenge.

In addition, vendors in the process of being acquired by a larger company may be included provided the acquisition is not finalized at the time of publication of the document. Vendors funded by venture capital firms may also be included even if the venture capital firm has a financial stake in the vendor's company.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Enterprise Automated Software Quality 2017-2018 Vendor Assessment – Driving Business Optimization via DevOps with Continuous Test and Integration* (IDC #US41601117, December 2017)
- *Worldwide DevOps Software Forecast Update, 2017-2021* (IDC #US43276517, December 2017)
- *IDC FutureScape: Worldwide Developer and DevOps 2018 Predictions* (IDC #US42652317, October 2017)
- *Market Analysis Perspective: Worldwide Agile ALM Quality and Portfolio Strategies, 2017* (IDC #US42050817, September 2017)
- *Worldwide DevOps Software Market Shares, 2016: Year of Growth and Innovation* (IDC #US41840817, July 2017)

Synopsis

IDC Innovators are emerging vendors with revenue <\$100 million that have demonstrated either a groundbreaking business model or an innovative new technology – or both. This IDC Innovators study profiles three notable vendors in the agile code development technologies market: CloudBees, GitLab, and Sonatype.

"There are a remarkable number of start-ups in the overall DevOps space, with many of those companies on the development side of providing agile development tools and technologies," said Al Gillen, group VP, Software Development and Open Source Software. "The companies profiled here help their customers become more agile in the overall development process. We expect most of the technologies being produced by these companies to play a long-term role in the industry."

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