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Everest Group PEAK Matrix® for Amazon Web Services (AWS) System Integrator 2022

Focus on HCL Technologies
October 2022

Everest Group PEAK MATRIX®

Background of the research

The growth of enterprise adoption of public cloud is accelerating. The public cloud market is seeing a proliferation in services offered by the hyperscalers and a corresponding increase in the investments made by SIs in their hyperscaler-specific cloud services and solution portfolio. AWS continues to dominate the overall public cloud market and is focusing on innovation across different portfolio segments covering infrastructure, platform, data, and next-generation services.

With more enterprises embarking on their public cloud migration journey, integrated delivery, and effective management of integrated capabilities across the core infrastructure, cloud application, and data on cloud has become crucial. Enterprises are looking for strong system integration capabilities across the entire life cycle of the cloud journey covering consulting, infrastructure design/build, cloud modernization, and cloud operate services for individual hyperscaler portfolio segments.

SIs are investing in a joint go-to-market approach, AWS-specific organization structure, talent development roadmap, AWS-specific solutions and IPs, and co-innovation activities to cater to enterprise demands. There has been an uptick in both organic and inorganic investments by SIs to attain AWS accreditations and competencies.

In this research, we present the assessment and detailed profiles of 29 SIs featured on the System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022. The assessment is based on Everest Group's annual RFI process for calendar year 2022, interactions with leading SIs, client reference checks, and an ongoing analysis of the AWS services market.

The full report includes the profiles of the following 29 leading AWS SIs featured on the AWS PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa
- **Aspirants:** Aspire Systems, Jade Global, Tavant, and Xebia

Scope of this report

Geography
Global

Providers
29 leading AWS SIs

Services
AWS cloud services

System Integration (SI) capabilities on AWS PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro

- Leaders continue to make strategic investments in AWS partnership through AWS accreditations, partner launch programs, and competencies for various industries, use cases, and workloads, along with joint go-to-market initiatives and solution co-creation with AWS
- These players have a credible industry-specific cloud offerings portfolio, AWS-specific assets and IPs, next-generation offerings, strong complex workload transformation capabilities, and a platform-centric solutioning approach
- Leaders have demonstrated capabilities of successful integrated cloud transformations across core AWS infrastructure, application, and data on cloud layers
- These players have demonstrated strong market impact and extensive capabilities in delivering value on cloud by being strategic partners in the customer's transformational journey

Major Contenders:

IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa

- While these players are increasingly investing in building AWS competencies across various workloads and use cases, their capabilities in offering verticalized cloud solutions built on AWS and AWS-specific cross-industry assets lag Leaders
- These players have demonstrated high market impact in terms of YoY growth and value delivered to clients, while providing system integration capabilities on AWS
- They are making targeted investments in AWS-specific talent development, delivery capabilities, and partnership ecosystem

Aspirants:

Aspire Systems, Jade Global, Tavant, and Xebia

- AWS system integration capabilities of Aspirants are in the initial stages of the partnership level in terms of accreditations, qualifications, and competencies
- These players prefer relying majorly on AWS' portfolio of industry-specific and cross-vertical solutions instead of investing in natively developed asset and IP portfolio, in order to deliver differentiated services to clients

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Everest Group PEAK Matrix®
System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022 | HCL Technologies positioned as Leader

Everest Group System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022[1]
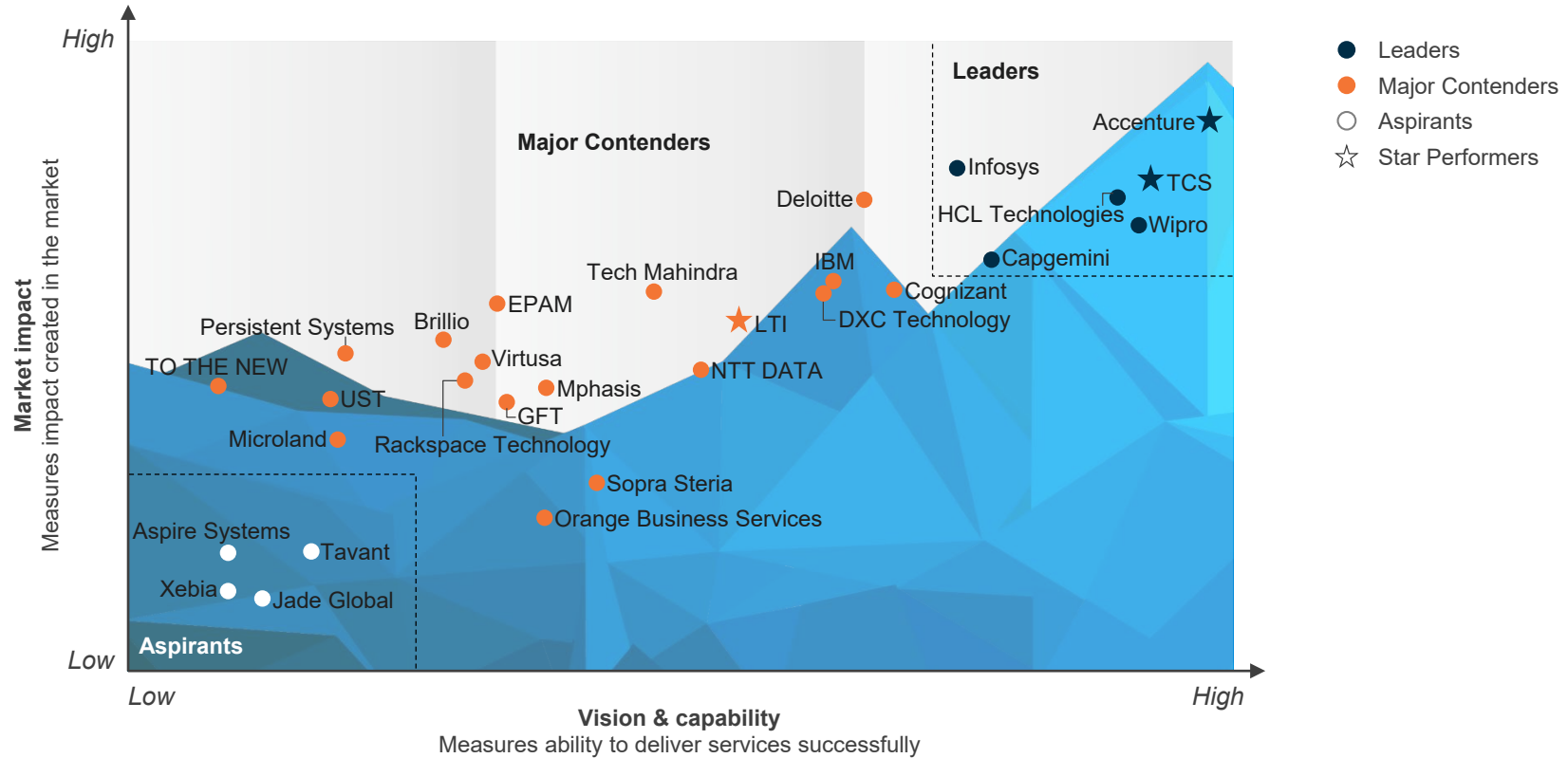
HCL Technologies | system integration capabilities on AWS (page 1 of 6)
Everest Group assessment – Leader

Measure of capability: ◔ Low ● High

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

- Enterprises can benefit from HCL's portfolio of industry-specific solutions that can ease enterprise cloud adoption through an industry-specific approach to significantly improve time-to-market while meeting the required compliances

- Enterprises looking for a strategic partner with next-generation capabilities such as IoT, AI/ML, edge, and 5G can benefit from HCL's AWS-specific solutions

- HCL can serve enterprises with SAP modernization requirements through its various relevant solutions such as SmartScaling, SmartAdming and SmartDeploy, which are a part of its CloudSmart suite

- Enterprises will benefit from HCL's capabilities in data sovereignty and sustainability in cloud, which can be confirmed through credible proof-points

- Some clients have praised HCL's proactiveness in engaging FinOps practitioners supported by HCL's DRYiCE MyXa IP

Limitations

- Enterprises searching for SIs with integrated cloud transformation capabilities should take a note of HCL's lack of proof-points around an integrated approach encompassing infrastructure, application modernization, and data on cloud

- Enterprises looking for a heavy onshore-centric delivery model need to carefully assess HCL's capabilities as a significant portion of its delivery footprint is currently offshore

- Some clients are concerned with the gap in the level of talent promised versus that present on-ground to deliver cloud transformation engagements on AWS

- Some clients have highlighted that HCL should follow an Agile- and DevSecOps-based operating model while being involved in AWS-related engagements

HCL Technologies | system integration capabilities on AWS (page 2 of 6)
Overview

AWS partnership overview

HCL is an AWS Premier Consulting Partner, Managed Service Provider (MSP), and Channel Partner with competencies across migration, DevOps, SAP, storage, and mainframe modernization. It has over 4,500 certified and more than 20,000 trained AWS resources globally. It helps clients implement their cloud strategies and accelerate their transformation journey by offering IP-based tooling.

Revenue from AWS-related services (2021)

<US$50 million	US$50-200 million	US$200-500 million	>US$500 million
			>US$500 million
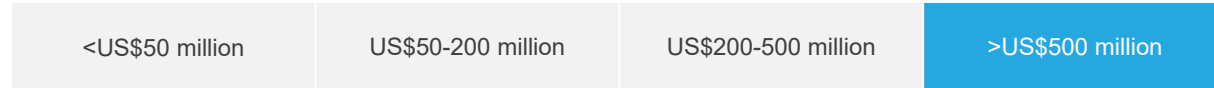
AWS portfolio – key highlights (representative list)

- Launched a dedicated Ecosystem Business Unit (EBU)
- First Indian HQ GSI for the AWS ISV Accelerate Program
- Principal-level partner for VMware Cloud (VMC) on AWS
- Launch Partner for Amazon CC Intelligence (AWS CCI) solutions, AWS Outposts, ECS-A, and EKS-A

Low (<10%) Medium (10-20%) High (>20%)

Adoption by buyer group

Small (annual revenue < US$1 billion)	Medium (annual revenue = US$1-5 billion)	Large (annual revenue > US$5 billion)

Adoption by geography

North America	UK	APAC	LATAM
MEA	Rest of Europe	Rest of the World	

Adoption by industry

BFSI	Energy utilities	Manufacturing
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Technology	Others

Adoption by service segments

Consulting services	Cloud infrastructure design/build services	Cloud modernization services	Cloud operate services

HCL Technologies | system integration capabilities on AWS (page 3 of 6)
Case studies

Case study 1	Modernizing customer experience using Amazon Connect

Client: a multinational railway company

Business challenge

The client's existing legacy contact center solution was unable to provide a modern customer experience due to its inflexibility. The client wanted support in improving the static, complex, and expensive architecture, as well as enabling automatic authentication-based user registered number, intelligent self-service for automatic ticket and appointment creation, and automatic language detection based on caller profiles

Solution

- Delivered a consumption-based public cloud solution with an intelligent contact center integration with ServiceNow
- Leveraged its innovative service delivery model and the FluidCC framework to handle the customer's CX requirements in the migration to Amazon Connect and successfully migrated over 4,000 employees smoothly with zero defects
- Ensured an efficient and optimized cost delivery model for legacy contact center migration, integration, and operation on Amazon Connect

Impact

- Improved CX by providing 24/7 service in natural language
- Automated critical provisioning and operational business processes leading to improved flexibility and cost-effectiveness
- Facilitated a rich ecosystem using the FluidCC framework, which provides significant opportunities to add new capabilities

Case study 2	Deployment and maintenance of CAD and PLM on AWS

Client: A multinational automobile major headquartered in Japan

Business challenge

The client required support in remote work enablement for CAD engineering during COVID-19, integration with PLM on-premise, and transformation of CAD on the cloud. HCL was responsible for ensuring optimum performance, security, and cost for the solution as well as deploying and maintaining CAD and PLM on AWS.

Solution

- Selected AWS End User Computing (EUC) to deploy Teamcenter Rich Client (RAC) and NX in Tokyo, Japan
- Ensured optimum cost and performance using benchmarking and rightsizing of AWS graphics Virtual Machine (VM) instances
- Enabled Single Sign-on (SSO) integration for unified identity management, security, and compliance
- Enabled application as well as desktop mode for easy user transition

Impact

- Selected right AWS services for graphics workload resulting in a cost reduction of 30%
- Ensured data security and compliance with CAD and PLM in the data center
- Improved user experience and productivity during COVID-19
- Provided rapid enablement of TC RAC and NX application on the cloud

HCL Technologies | system integration capabilities on AWS (page 4 of 6)
Solutions/IPs/products

Proprietary solutions/IPs/products (representative list)	
Event name	**Details of the tool/solution**
Intelligent Asset Tracking and Management (IATM)	A solution for tracking and managing assets along the device life cycle
Decode	• Manages, monitors, configures, and troubleshoots IoT and edge devices remotely from a consolidated dashboard • Introduces a standardized and unified workflow to monitor and manage a diverse set of connected devices
1PLM	A solution that helps enterprises deploy fast, secure, and high-performance CAD and PLM on AWS. Created using a combination of deep engineering system experience and strong partnerships with software, graphics technology, and AWS
BigFix	An endpoint security solution that automates discovery, management, and remediation of all endpoints regardless of the operating system
Velocity	Accelerates VMware on AWS using a holistic framework based on validated reference architecture and blueprints required to design, deploy, and manage hybrid and multi-cloud platforms
HCL Augmented Network Automation (ANA)	A next-generation SON platform, built on the foundation of Cisco SON, that • Enables Communications Service Providers (CSPs) to simplify network management complexity • Collects and processes a vast amount of data in real-time from all network domains to automatically predict, configure, and optimize multi-domain networks
HCL Ziva for banking	Functions as an Amazon Contact Center solution for the banking vertical
HCL Workload Automation (HWA)	A holistic solution for workflow automation, advance scheduling, real-time monitoring, and file management
Advantage Migrate	Reduces overall migration efforts and improves time to market for data modernization from legacy system to cloud
Advantage Code	Improves developer productivity and experience in cloud-native app development using automation

HCL Technologies | system integration capabilities on AWS (page 5 of 6)
Partnerships

Partnerships (representative list)	
Partner name	**Details**
SAP	SAP on AWS has been a major focus area of joint GTM. HCL is an SAP competency partner that utilizes the Migration Acceleration Program (MAP) for SAP for joint pursuits. AWS has also nominated a dedicated resource for SAP on AWS opportunities with HCL
VMware	VMC on AWS motion with a tripartite agreement and GTM between AWS, VMware, and HCL
Snowflake	Snowflake on AWS motion with a tripartite agreement and GTM between AWS, Snowflake, and HCL. It leverages the Consulting Partner Private Offers (CPPO) program of AWS for this joint motion
Intel	Cloud Instance Reference Program (CIRP) carved out for joint GTM with Intel and AWS. HCL aims to choose specific EC2 instances for workloads such as SAP and HPC
Siemens	Siemens and HCL are collectively driving the teamcenter motion on AWS
NetApp	NetApp FSX storage on AWS provides solutions for customers who are running NetApp on-premise and are exploring migration to the cloud
SPOT	Driven by cloud economics / FinOps, SPOT is utilized by customers who wish to utilize Reserved Instances (RI) and savings plan in an efficient manner
Actian	Being a competition to AWS Redshift, Actian is used by customers for accessing data integration, data management, and data analytics services in a flexible and easy-to-use platform

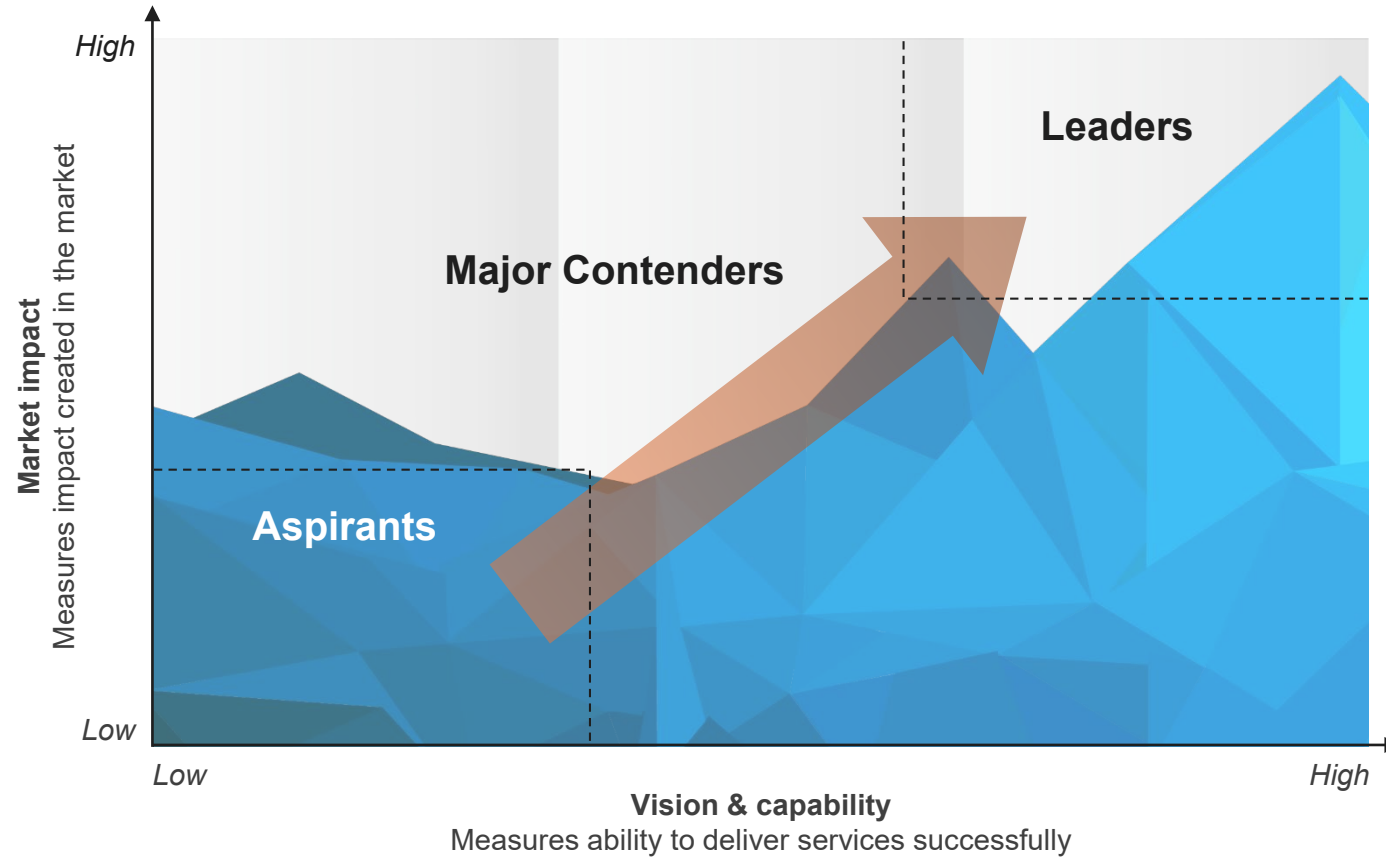# HCL Technologies | system integration capabilities on AWS (page 6 of 6)
Investments and recent activities

Investments (representative list)	
Investment name	**Details**
Talent	• Trained over 15,000 resources through AWS hybrid training programs such as with authorized training partners and online AWS Alumnus • Conducted multiple joint dedicated sessions through AWS for specialty certifications • Conducted sessions with AWS technical SMEs into specific services with hands-on labs sessions as part of the AWS immersion days • Conducted multiple events in collaboration with AWS to tackle real-world problems through a gamification model
AWS business unit creation	Hired resources and crafted a dedicated AWS business unit
Industry software division - joint product and MVP creation	Jointly developed field-ready kits and foundational technical reviews for products like HCL ANA
Cloud-native labs development for joint solutions	Joint GTM and multiple labs with NetApp and VMC on AWS
Customer roundtables and industry events	Conducted regional customer roundtables and sponsored industry events such as MWC Summit, AWS Summits, and joint sales collateral creation

Appendix

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

Everest Group PEAK Matrix

Major Contenders

Leaders

Aspirants

High

Low

Market impact
Measures impact created in the market

Low

High

Vision & capability
Measures ability to deliver services successfully

Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

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

Value delivered

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

Market impact

Leaders

Major Contenders

Aspirants
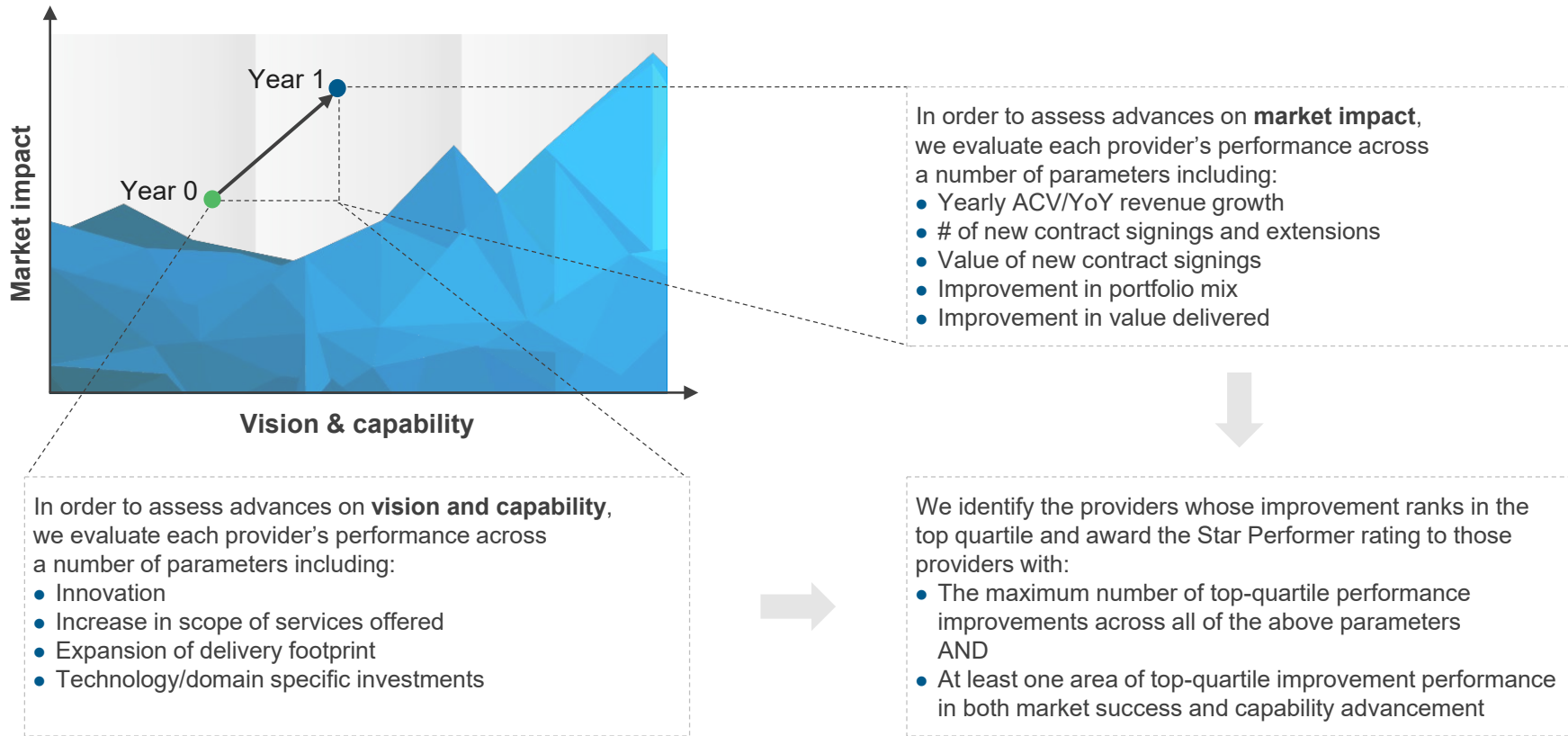
Vision & capability
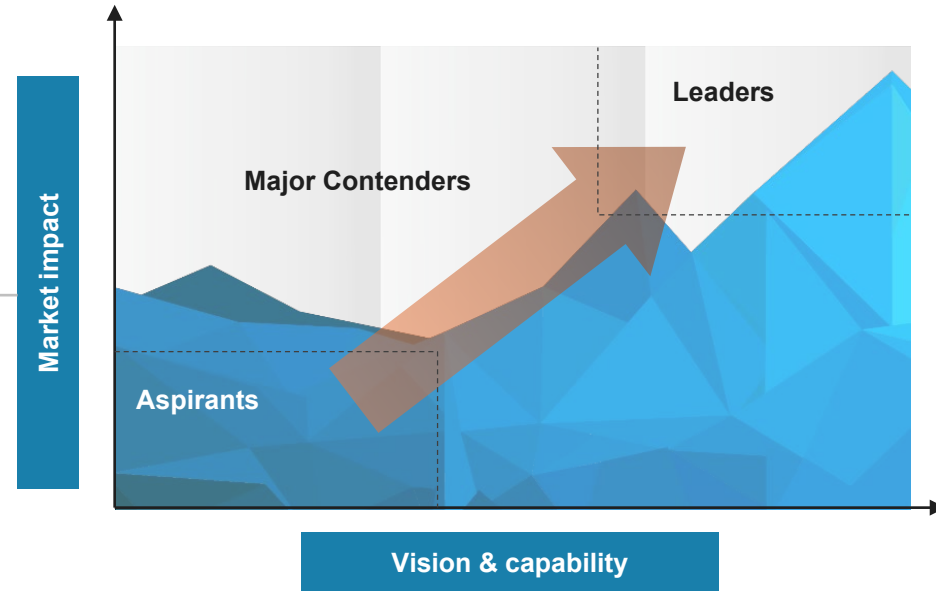
Measures ability to deliver services successfully. This is captured through four subdimensions

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 subsegments/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

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix

Market impact (y-axis) / **Vision & capability** (x-axis)

Year 1

Year 0

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:
- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:
- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:
- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?
A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
  – The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
  – In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?
- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
  – Issue a press release declaring positioning; see our citation policies
  – Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
  – Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

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With you on the journey

Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at **www.everestgrp.com**.

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