

# Everest Group PEAK Matrix<sup>®</sup> for Amazon Web Services (AWS) System Integrators 2021

Focus on HCL Technologies  
December 2020



## Introduction and scope

Everest Group recently released its report titled “[System Integrator \(SI\) Capabilities on Amazon Web Services \(AWS\) PEAK Matrix® Assessment 2021](#)”. This report analyzes the changing dynamics of the AWS public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 27 system integrators on the Everest Group PEAK Matrix® for SI capabilities on AWS into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of AWS system integrators based on their absolute market success and delivery capability.

Based on the analysis, **HCL Technologies emerged as a Leader**. This document focuses on HCL Technologies’ SI capabilities on AWS and includes:

- HCL Technologies’ position on the SI capabilities on AWS PEAK Matrix®
- Detailed AWS services profile of HCL Technologies

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators’ 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 system integrator capability for an ideal fit.

## Background of the research

- Enterprise consumption of cloud has witnessed a dramatic shift, from a skeptical outlook towards public cloud to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or more public clouds in their enterprise environment
- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises could see clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts with migration to public cloud being a key transformation lever
- Being the market leader, AWS has witnessed a spike in adoption for its products across compute, storage, applications, data & analytics, IoT, and blockchain. AWS has also undertaken several COVID-19 initiatives to help customers in ensuring business continuity in the areas of remote work & learning, research, and other initiatives. This has led to a proliferation of AWS offerings in the market, which coupled with management complexities, and talent crunch is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the AWS landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we present an assessment and detailed profiles of 27 system integrators featured on the SI capabilities on AWS PEAK Matrix®. Each system integrator 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 conducted over 2020, interactions with AWS cloud system integrators, client reference checks, and an ongoing analysis of the cloud services market.

**This report assessed the following 27 system integrators on the SI capabilities on AWS PEAK Matrix®:**

- **Leaders:** Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Blazeclan, Brillio, Cloudreach, Ensono, Genpact, GFT, LTI, Microland, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, Trianz, UST Global, and Virtusa
- **Aspirants:** Aspire System, Coforge, Cybage, and Zensar

### Scope of this report:



**Geography**  
Global



**System Integrators**  
27 leading cloud system integrators



**Services**  
Cloud services

## System Integrator (SI) Capabilities on AWS PEAK Matrix® characteristics

### Leaders:

Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro

- Leaders have established successful businesses in AWS services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes and build strategic roadmaps for AWS services (internal IP/tools, partnerships, and acquisitions)
- Leaders have a strong focus on driving alignment between the business and IT teams of enterprises to drive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale/complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US\$5 billion)

### Major Contenders:

Blazeclan, Brillio, Cloudreach, Ensono, Genpact, GFT, LTI, Microland, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, Trianz, UST Global, and Virtusa

- Major Contenders in the AWS services space include born-in-the-cloud system integrators as well as Indian-heritage system integrators
- While global players strongly leverage/include their assets and datacenter footprint along with their AWS services offerings, “asset-light” providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the AWS services spectrum, as well as in increasing their global coverage

### Aspirants:

Aspire System, Coforge, Cybage, and Zensar

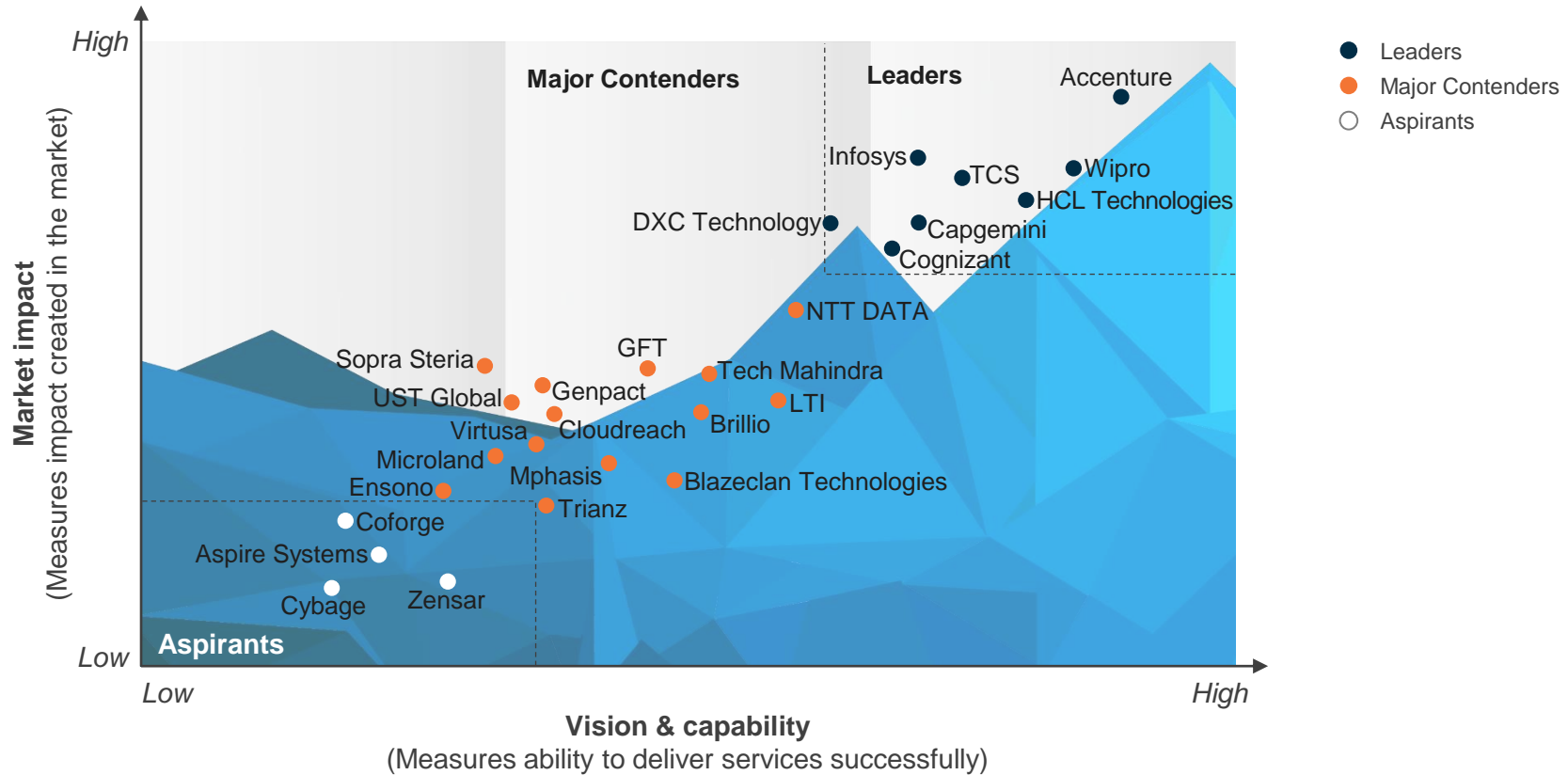
- The AWS services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on AWS to build market awareness and credibility as strategic transformation partners for enterprises

# Everest Group PEAK Matrix®

## System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021 | HCL Technologies positioned as Leader



Everest Group System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021



Source: Everest Group (2020)

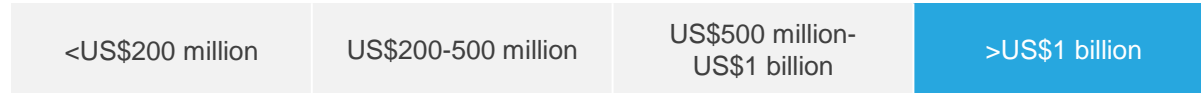
# HCL Technologies | system integrator capabilities on AWS (page 1 of 5)

## Overall cloud services overview

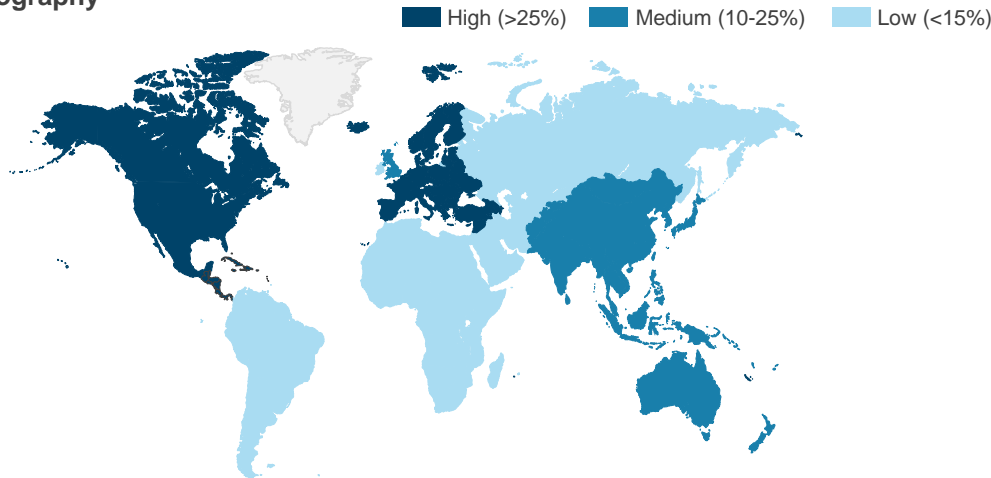
### Cloud services vision

HCL Technologies provides a suite of cloud services that delivers smarter digital experience across the cloud value chain. It offers a full spectrum of services from cloud to the edge that aims to enable experience-centric and outcome-oriented business benefits for its clients. It has adopted “everything-as-a-service” philosophy, which looks to offer an open, scalable, and integrated multi-cloud approach and support clients’ life cycle of cloud transformation through a single unified catalog.

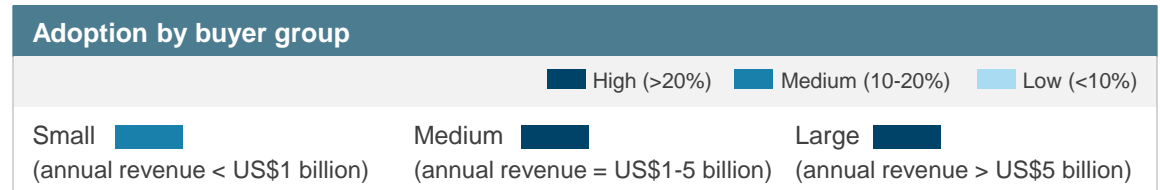
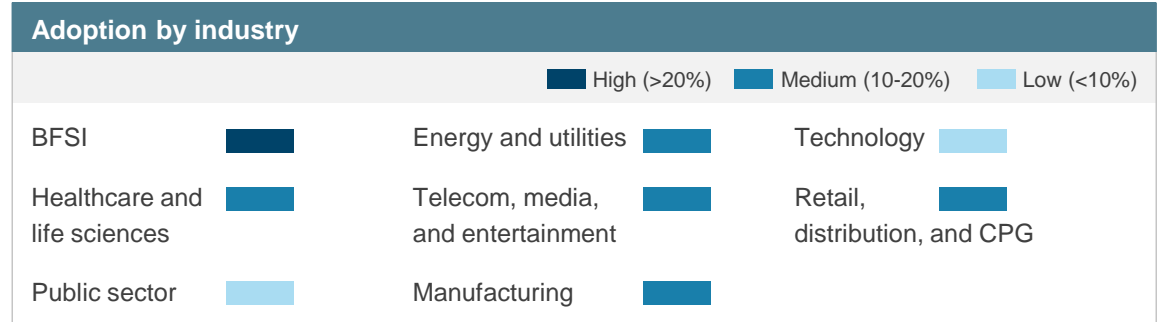
### Overall cloud services revenue (2019)



### Adoption by geography



Source: Everest Group (2020)



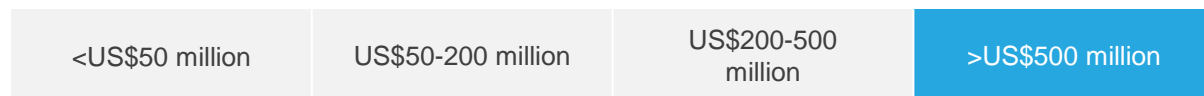
# HCL Technologies | system integrator capabilities on AWS (page 2 of 5)

## Capabilities on AWS overview

### AWS partnership overview

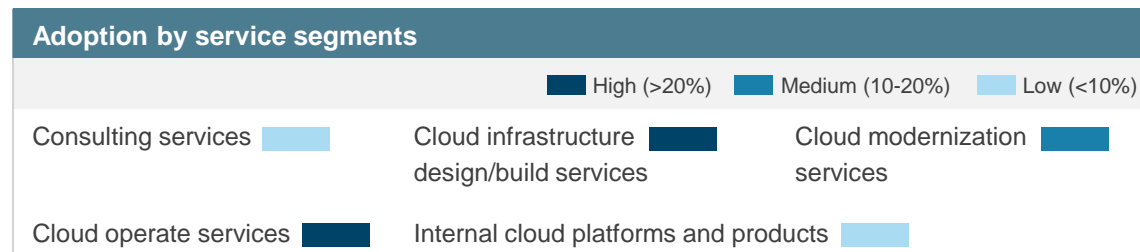
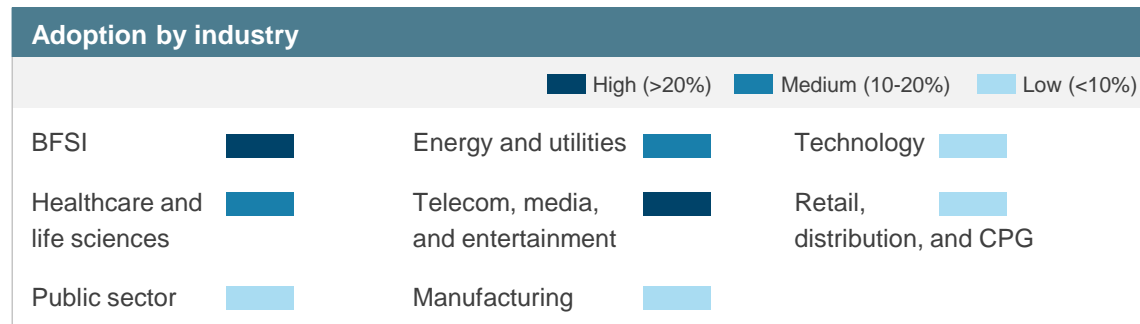
HCL Technologies and AWS partner to deliver accelerated transformations at scale for their customers leveraging its IPs and frameworks. HCL Technologies is a premier consulting partner for AWS with competencies across migration, SAP, DevOps, and storage, and provides end-to-end AWS managed services and operations through ElasticOps. HCL Technologies also offers a seamless purchasing experience on the AWS Marketplace with HCL AWS CPPO.

### Revenue from AWS-related services (2019)



### AWS portfolio – key highlights (representative list)

- Several HCL Technologies products are available on AWS Marketplace including Informix, OneTest, Workload Automation, and CoTrust Blockchain Platform
- AWS-specific competencies include MSP, Migration, SAP, DevOps, Storage, Public Sector, and MAP
- HCL Technologies is the launch partner for AWS Outpost and VMC on AWS
- Key use cases delivered on AWS include:
  - API-driven digital engagement platform to integrate the ecosystem of systems, partners, and users
  - SAP migration
  - Migration of IoT-based applications to public cloud



# HCL Technologies | system integrator capabilities on AWS (page 3 of 5)

## Key solutions

Proprietary solutions (representative list)	
Solution name	Details
MyCloud	A proactive multi-cloud life cycle management product that empowers organizations to optimally govern, provision, monitor, and manage cloud infrastructure
CloudArmour	A security platform that provides comprehensive visibility in clients' cloud environment to keep constant compliance check and adhere to all defined policies including HIPPA, PCI-DSS, CIS, ISO, and SOC
VelocITy	A multi-cloud solution based on certified and validated reference architecture available to be consumed based on flexible commercial constructs. It addresses business productivity, intelligent migration, and DevOps, providing benefits such as faster time-to-market, agility, and predictability
Dprizm	A patented unified assessment tool for cloud readiness analysis and cloud migration strategy and planning
Action	A portfolio of products and solutions spanning data management, integration, and analytics, activating the value of hybrid data for enterprises
DRYICE MyXalytics	A unified reporting and dashboarding software tool. It ingests data from multiple enterprise tools, creates insightful and intuitive reports, and projects the results, configurable in role-based dashboards
DRYICE MTaaS	A hosted enterprise management platform powered by the DRYiCE AIOps framework for delivery of IT management tools
HCL's Integration Platform (HIP)	It enables complex data transformation and validation across a range of messaging standards and data formats, including those involving industry-specific formats. It joined the AWS Well-Architected Framework based on five factors: operational excellence, security, reliability, performance efficiency, and cost optimization
XRStudio	Extended Reality platform to rapidly develop industry-ready augmented, virtual, and mixed reality applications using reusable modules, components, algorithms, starter kits, and conversion kits
BackupNXT	A backup solution that provides integration of on-premise backup infrastructure to AWS
RECOVERNXT	Fully automated data recovery on cloud solution with pay-as-you go model, providing flexibility and savings on licensing costs
CoTrust	Enables accelerated enterprise adoption of blockchain technologies. It is available in AWS Marketplace
HCL Workload Automation	It seamlessly orchestrates complex workflows across multiple platforms and applications.
HCL VersionVault	It helps organizations by balancing flexibility with the organization's need for control. It provides controlled access to soft assets, including code, requirements, design documents, models, schematics, test plans, and test results.
HCL 1PLMCloud	Helps in remote work enablement and runs exclusively on AWS cloud, thereby enabling a fast, secure, and high-performance Creo environment on cloud for enterprise users.



# HCL Technologies | system integrator capabilities on AWS (page 4 of 5)

## Case study, investments, and recent activities










Case study	SAP migration & modernization
<p><b>Client:</b> A global provider of professional information, software solutions, and services major</p> <p><b>Business challenge</b>                      The client organization had multiple business entities running their own ERP systems and were spread across multiple locations including US, Canada, Europe, and APAC. It had disparate number of SAP systems implemented on DC, adding to huge operational cost with a high number of interfacing applications increasing the complexity of migration to AWS. Seasonality of business demanded that migration happens with minimum downtime</p> <p><b>Solution</b>                      HCL Technologies was responsible for blueprinting, creating migration strategy, compatibility analysis, “to-be” state of SAP landscape, hardware sizing, and planning and execution. AWS cloud environment setup was done as per best practices with use of automation for provisioning and operations. It was a two-phased process for SAP application migration to reduce the downtime in all SAP environments and expedite the process with minimal risk. Phase 1 consisted of setting up SAP environment with first database copy from NTT to AWS, using a system refresh method followed by validation. Phase 2 catered to second database refresh during the cutover time with Oracle Data Guard tool.</p> <ul style="list-style-type: none"> <li>• Performed Pin Test security testing for all implemented applications as an additional security measure</li> <li>• Successful validation and release of over 100 upstream/downstream interface applications connected to SAP</li> <li>• The entire SAP landscape is currently being managed by HCL Technologies, supported by 45+ resources</li> </ul> <p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Cost reduction of over 45% through successful migration of SAP on AWS</li> <li>• Achieved scalability, agility, and enhanced system performance</li> <li>• Minimized downtime during migrations using Oracle DataGuard</li> </ul>	

Recent investments and activities (representative list)	
Development	Details
Partnerships	<ul style="list-style-type: none"> <li>• Has developed an ecosystem of partners on AWS with over 150 vendors, customers, and niche solution providers including VMware, Rubrik, NetApp, Commvault, and Nasuni</li> <li>• HCL Technologies has onboarded Cloudamize &amp; Moogsoft on the AWS CPPO Program</li> <li>• HCL Technologies &amp; Intel work closely on joint deals and assist customers on the migration journey to AWS</li> <li>• HCL’s Version Vault &amp; 1PLMCloudseamlessly runs on AWS infrastructure</li> </ul>
Delivery centers	Opened a delivery center in Hamilton, New Zealand, as part of its commitment to deliver innovation for both enterprises and public sector organizations in the region. The center will provide access to IT services and digital business technologies including blockchain, cybersecurity, cloud, and AI
Digital offerings	Launched industry’s first virtual distributed agile framework to enable organizations to accelerate their agile digital journeys for globally distributed teams

# HCL Technologies | system integrator capabilities on AWS (page 5 of 5)

## Everest Group assessment – Leader

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

- There are several HCL products on the AWS marketplace including Informix, OneTest, Actian, and CoTrust Blockchain Platform that showcases its innovative capabilities and maturity on AWS
- HCL Technologies has been extensively partnering with leading AWS and third-party platform providers to invest in Center of Excellence (CoE) and design labs for aiding in co-innovation with clients and talent development
- Leverages its proprietary IPs extensively including DRYiCE automation platform to accelerate cloud journey, improve developer productivity, and drive business outcomes
- HCL Technologies' collaborative approach is recognized by the clients and they value the extra mile its leadership goes to understand business process and objectives of engagement

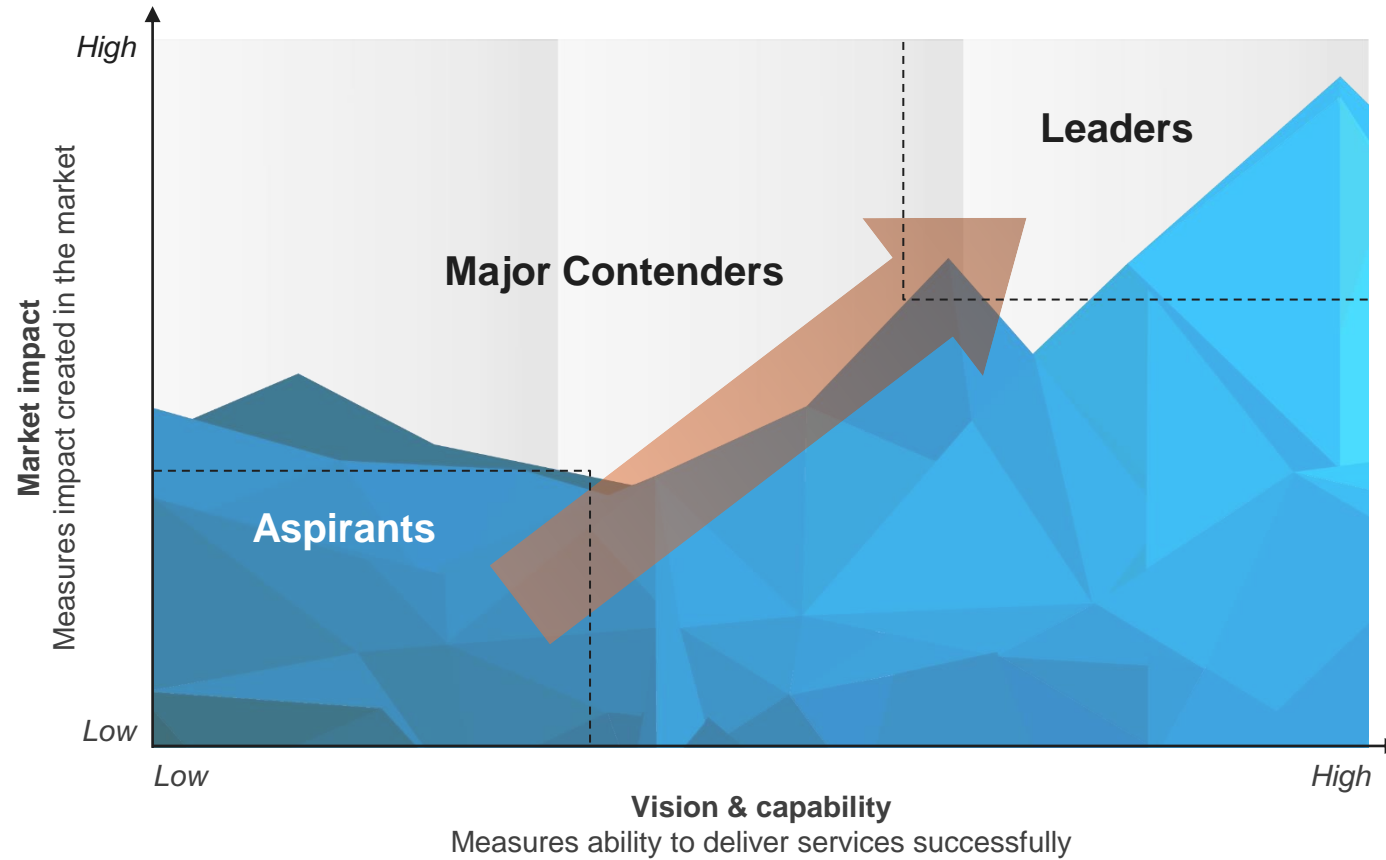
### Areas of improvement

- Despite its end-to-end AWS capabilities, HCL Technologies needs to focus on attaining industry-specific and workload competencies from AWS
- Clients feel there is scope for improvement in completing post-migration activities and security-related tasks on AWS
- HCL needs to be proactive in breaking down the internal silos amongst its different service lines and creating a unified cloud services front for clients
- It can further strengthen its advisory capabilities and focus on driving innovation through its cloud-native engagements on AWS

# Appendix

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

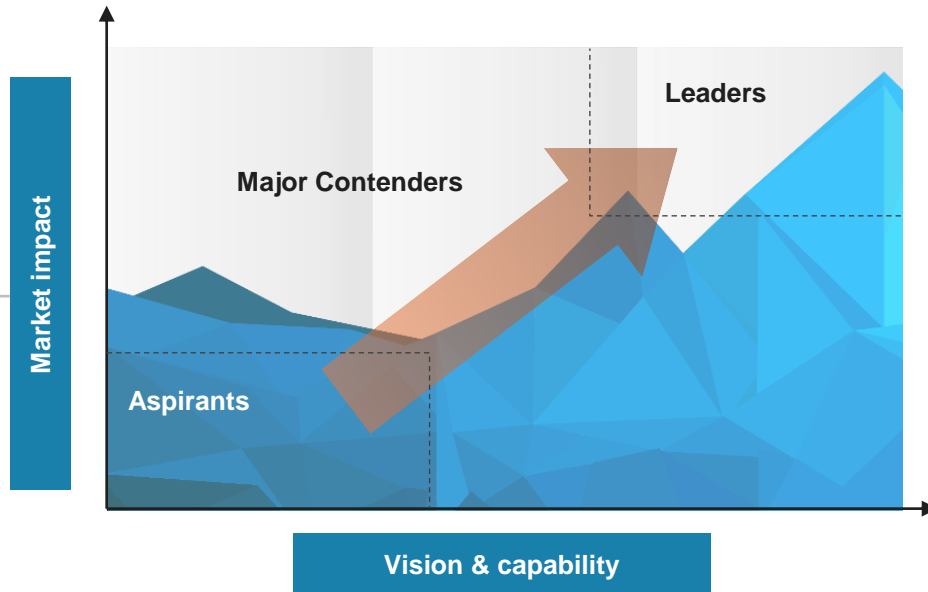
Everest Group PEAK Matrix



# 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



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

# FAQs

## **Does the PEAK Matrix® assessment incorporate any subjective criteria?**

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging system integrator / 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 system integrators / 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 system integrator / 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



Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [everestgrp.com](https://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](https://www.everestgrp.com)

### Social Media

-  @EverestGroup
-  @Everest Group
-  @Everest Group
-  @Everest Group

### Blog

[everestgrp.com/blog](https://www.everestgrp.com/blog)

### Podcast

DigitalReallTy



### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)  
+44-207-129-1318

### New York

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-646-805-4000

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)  
+1-416-388-6765

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*