



# Everest Group PEAK Matrix<sup>®</sup> for Microsoft Azure System Integrator 2022

Focus on HCL Technologies  
October 2022



## Background of the research

Enterprise adoption of the public cloud is on an accelerated growth trend. The public cloud market is experiencing a proliferation of services offered by hyperscalers and a corresponding increase in investments made by System Integrators (SIs) in their hyperscaler-specific cloud services and solution portfolio. Azure continues to enjoy significant enterprise mindshare and is experiencing increased adoption as the preferred public cloud partner, rapidly closing the gap with AWS.

With more and more enterprises embarking on their public cloud migration journey, integrated delivery and effective management of integrated capabilities across core infrastructure, cloud application, and data on the cloud have 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 operation services for the individual hyperscaler portfolio segments.

SIs are investing in an industry-cloud-focused joint go-to-market approach, Azure-specific organization structure, Azure-focused 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 Azure accreditations and competencies.

In this research, we present the assessment and detailed profiles of 31 SIs featured on the [System Integration \(SI\) Capabilities on Microsoft Azure PEAK Matrix® Assessment 2022](#). The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading SIs, client reference checks, and an ongoing analysis of the Azure services market.

**This report includes the profiles of the following 31 leading Microsoft Azure SIs featured on the Microsoft Azure PEAK Matrix:**

- **Leaders:** Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Brillio, Deloitte, EPAM, GFT, IBM, Infogain, LTI, Microland, Mindtree, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, UST, and Virtusa

**Aspirants:** Aspire Systems, GAVS Technologies, Jade Global, Tavant, and Xebia

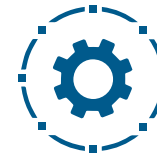
### Scope of this report



**Geography**  
Global



**Providers**  
31 leading Microsoft Azure SIs



**Services**  
Azure cloud services

## System Integration (SI) Capabilities on Microsoft Azure PEAK Matrix® characteristics

### Leaders:

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

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

### Major Contenders:

Brillio, Deloitte, EPAM, GFT, IBM, Infogain, LTI, Microland, Mindtree, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, UST, and Virtusa

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

### Aspirants:

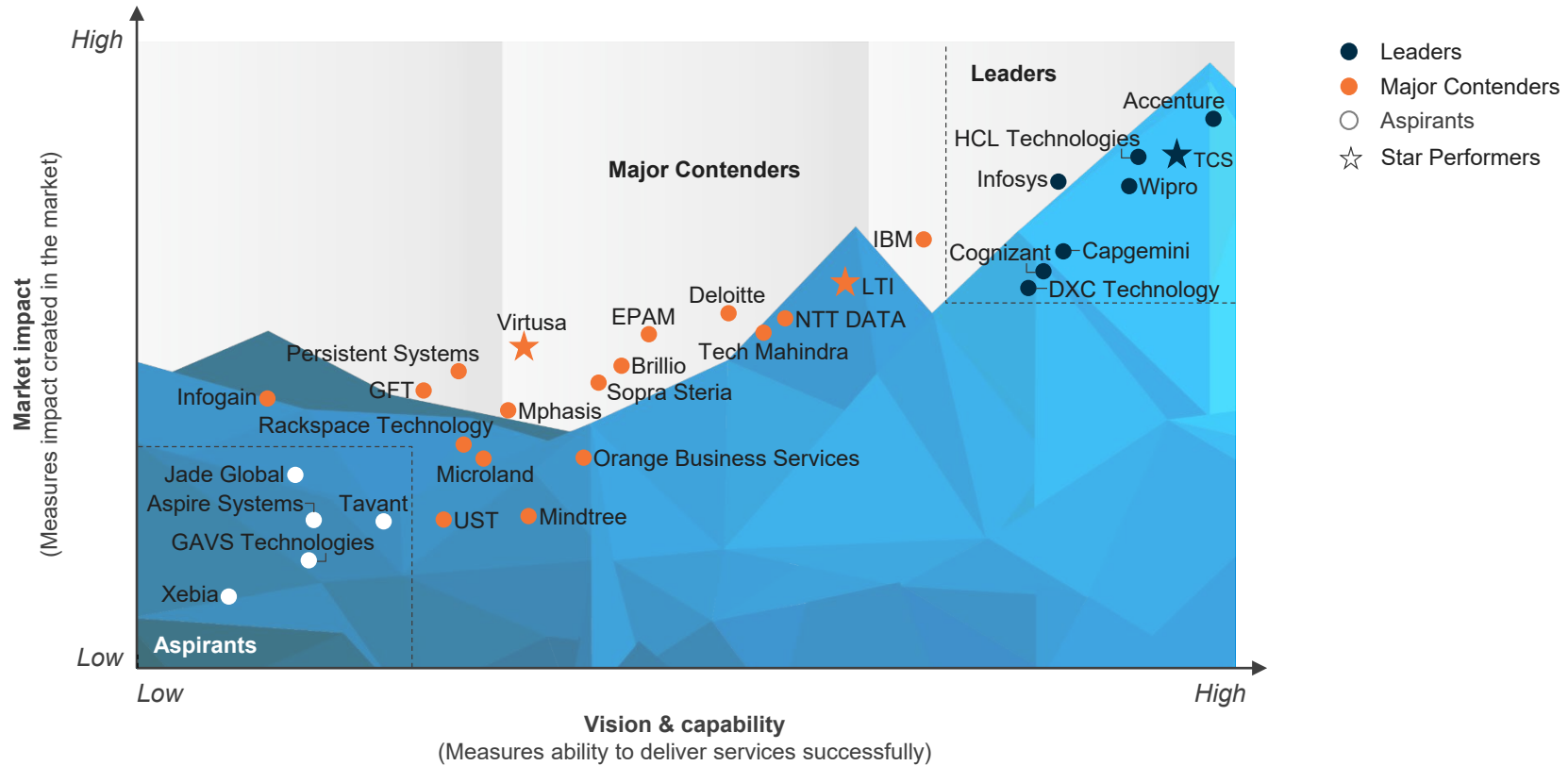
Aspire Systems, GAVS Technologies, Jade Global, Tavant, and Xebia

- Azure 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 Azure's portfolio of industry-specific and cross-vertical solutions instead of investing in natively developed assets and IP portfolio, in order to deliver differentiated services to clients

# Everest Group PEAK Matrix®

## System Integration (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2022 | HCL Technologies positioned as Leader

Everest Group System Integration (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2022<sup>1</sup>












<sup>1</sup> Assessment for Capgemini and Deloitte excludes system integrator inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these system integrators, system integrator public disclosures, and Everest Group's interaction with buyers

Source: Everest Group (2022)

# HCL Technologies | system integration capabilities on Microsoft Azure (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 looking for verticalized solutions on Azure will find HCL well-suited as it has developed Azure-specific industry cloud solutions such as PowerBanking and PowerInsurance and continues to make investments to strengthen its offerings
- Enterprises will benefit from HCL’s capabilities in data sovereignty and sustainability, enhanced by its co-innovation efforts with Microsoft for building data sovereignty capabilities and Microsoft Cloud for Sustainability
- HCL has strengthened its security capabilities by achieving all security specializations and is now a member of the Microsoft Intelligent Security Association (MISA), which enables it to provide clients with comprehensive security offerings as part of its Azure engagements
- Some clients have highlighted technical and domain expertise as key areas of strength for HCL in the Azure-related engagements

### Limitations

- While HCL has a significant Azure market share in North America and Europe, enterprises requiring support in other geographies such as LATAM and MEA should evaluate its delivery strength in their respective regions
- Enterprises looking for a heavy onshore-centric delivery model need to carefully assess HCL's capabilities as a significant portion of its Azure delivery footprint is currently offshore
- Some clients have highlighted challenges in terms of HCL’s abilities to develop and proactively bring forward new and innovative solutions/IPs as part of its Azure-specific engagements
- Some clients have highlighted commercial flexibility and lack of an agile way of working as key challenges with HCL as part of the Azure-related engagements

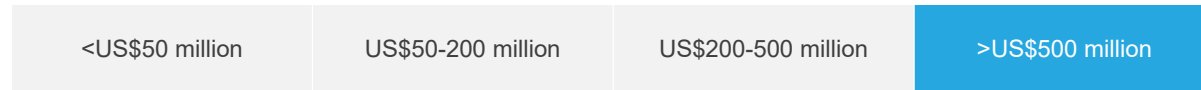
# HCL Technologies | system integration capabilities on Microsoft Azure (page 2 of 6)

## Overview

### Azure partnership overview

HCL is a Microsoft Azure Expert MSP with focused Microsoft capability development. The HCL Microsoft ecosystem unit enables businesses to transform into more agile and adaptive enterprises. HCL Microsoft industry solutions are broadly categorized into two categories; industry-specific applications that deliver industry-specific business outcomes and foundational platforms that are core platforms and solutions to enable a cloud transformation journey.

### Revenue from Azure-related services (2021)

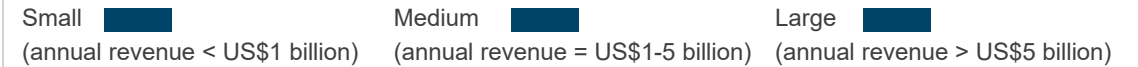


### Azure portfolio – key highlights (representative list)

- Achieved all 18 Microsoft Gold competencies and 14 advanced specializations
- Permanent presence at Microsoft campus in Redmond through labs – IoTcollab and Lab21
- HCL is a member of the Microsoft Intelligent Security Association (MISA) and holds all four advanced specializations in security
- Microsoft Launch Partner for MS Cloud for healthcare and MS Cloud for retail
- Microsoft 2022 Partner of the Year Winner Healthcare & Life Sciences, Microsoft 2022 partner of the Year winner in the United Kingdom

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

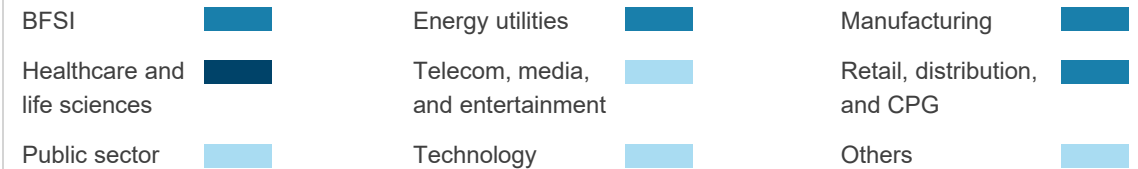
### Adoption by buyer group



### Adoption by geography



### Adoption by industry



### Adoption by service segments



# HCL Technologies | system integration capabilities on Microsoft Azure (page 3 of 6)

## Case studies

### Case study 1

#### Enabled healthy communities for a utilities major

**Client:** a 24\*7 high-quality water supply and sewage service provider

#### Business challenge

The client wanted to transform its unstructured data into an intelligent data platform to identify underspending and overspending, which was crucial to ensure the service is kept affordable for customers and there is an efficient use of resources.

#### Solution

- Designed an intelligent data platform on Azure with a composable architecture covering data ingestion, data management, reporting, and insights
- Provided static data analysis of water flow trends (hourly, weekday) and forecasted hourly water flow for the next seven days using PowerBI
- Converted phone conversation audio into text file to extract customer details using NLP
- Created an AI/ML-based solution to minimize unplanned outages that were resulting in revenue loss and skyrocketing maintenance costs
- Analyzed water logger data and identified anomalies, low flow incidents, and outage flags across channels such as call center and social media to confirm an outage and reduce false positives

#### Impact

- Enabled early warnings about illegal pollution of the sewerage network
- Enabled energy savings due to less water being pumped at a lower average pressure by 20%
- Reduced bursts in water pipes by 40% and cut leaks by 20%
- Improved customer experience and sustainability maturity

### Case study 2

#### Led the digital transformation program for a chemical manufacturer

**Client:** a global chemical manufacturer

#### Business challenge

The client was in need for a global digital transformation program that included the implementation of a new standardized ERP platform, new solutions for manufacturing and engineering, and additional capabilities to make IT infrastructure more reliable, globally.

#### Solution

- Procured, installed, and configured the application tier, HANA Databases (TDI Architecture), and Sybase ASE
- Migrated the IBM CMS infrastructure to a public cloud platform
- Upgraded and migrated SAP S/4 HANA on the public cloud platform
- Moved over 44 servers on Azure Site Recovery and set up disaster recovery in two weeks

#### Impact

- Reduced governance and oversight of the IT systems
- Reduced maintenance efforts for SAP systems by 30%
- Guaranteed an SLA of 99.95% at the SAP application level
- Delivered a Recovery Time Objective (RTO) of less than five hours against a committed RTO of 24 hours
- Delivered Recovery Point Objective (RPO) of less than one minute against a committed RPO of 30 minutes

# HCL Technologies | system integration capabilities on Microsoft Azure (page 4 of 6)

## Solutions/IPs/products

### Proprietary solutions/IPs/products (representative list)

Event name	Details
Real-time Manufacturing Insights (RMI)	<ul style="list-style-type: none"> <li>• A connected manufacturing solution that provides real-time operational visibility from shop floor to top floor for manufacturing enterprises</li> <li>• Reduces losses from unplanned downtime, increases assets productivity, and reduces maintenance costs</li> </ul>
Digital Twin	An asset providing 360-degree visibility and insights for physical assets by bringing the physical and digital worlds to interact, enrich, and retrain each other to improve the asset performance, availability, reliability, and reduce field service cost and operational risks
Extended Reality as a Service (XRaaS)	<ul style="list-style-type: none"> <li>• An end-to-end XR Solution, which leverages the power of the standard XR platforms, tools, devices, and technologies such as Azure, D365 Guides, D365 RA, HoloLens, and in-house XTERN tool suite</li> <li>• Reduces the task time and increases RoI with faster time-to-market</li> </ul>
IoT Platform for Healthcare Assets (CARE)	<ul style="list-style-type: none"> <li>• An IoT platform for healthcare assets, which harnesses the connected capability of MC4H empowering digital transformation for healthcare</li> <li>• It is a platform-based approach which reduces the cost of building new services, and the reusable components accelerate software development</li> </ul>
Conversational AI solution	<ul style="list-style-type: none"> <li>• An NLP/NLU cross-industry offering framework, which leverages AI and Azure cognitive services. It provides standardized summarization, content automation, and data extraction pipeline of enterprises</li> <li>• Increases the overall productivity for complex domain tasks and organizational AI efficiency through intelligent automation</li> </ul>
Geospatial Linear Asset Management (GLAM)	<ul style="list-style-type: none"> <li>• An Azure-powered solution which leverages drone-captured aerial imagery (LIDAR, Radar, Satellite, Optical, and Infrared), image analytics, deep learning, and geospatial insights to transform traditional and costly linear asset (pipelines, T&amp;D lines, etc.) inspection methods</li> <li>• Provides asset inspection, monitoring, and detection of any abnormality with real-time alerting</li> </ul>
Dynamics 365 for capital markets	<ul style="list-style-type: none"> <li>• Enables capital markets firms to accelerate time-to-market, mitigate deployment risk, reduce program costs, increase user adoption, and streamline user experience and customer interactions</li> <li>• This customizable solution leverages Microsoft Dynamics 365 and the full suite of related Microsoft Business Applications</li> </ul>
Unica on Azure	A cloud-native and fully-integrated enterprise marketing automation platform that provides precision marketing at scale
AppScan on Azure	A DevSecOps solution that pinpoints and remediates application vulnerabilities in every phase of the development life cycle and delivers application security testing tools to enterprises to ensure that the business and its customers are not vulnerable to security attacks
Dynamics 365 for insurance	A custom solution built on Dynamics 365, which features preconfigured insurance-specific products and services. It has a holistic claims management system, separate portals for clients and agents, and the capability to integrate with underwriting systems and provide an automation of the process.

# HCL Technologies | system integration capabilities on Microsoft Azure (page 5 of 6)

## Partnerships

### Partnerships (representative list)

Partner name	Details of the partnership
Commvault	HCL is a member of Commvault's Global System Integrator (GSI) program and provides two primary services: <ul style="list-style-type: none"> <li>• BackupNXT: backup and archive via cloud</li> <li>• Infrastructure Utility Services (IUS): subscription model deployment</li> </ul>
VMware	HCL and VMware have been strategic partners since 2008. It has over 1,600 certifications and accreditations on VMware technologies with over 4,000 professionals trained on VMware.
Cisco	HCL has a 21-year relationship with Cisco and a direct presence in 34 countries and deployment capabilities of Cisco-based solutions in over 120 countries. Its service and consulting portfolio encompasses datacenter transformation, network transformation, cloud, Utility for Everything (U4X), communications and collaboration, autonomies, and orchestration.
Intel	HCL Technologies and Intel Corporation have announced a collaboration to build a future-ready reference architecture for digital technology platform solutions to accelerate their customers' digital journeys, including datacenter management, cloud native, software-defined networks, artificial intelligence, and the digital workplace.
Finstra	HCL has expanded its partnership with Finstra to drive digital transformation across South Korea and Taiwan. As a part of this engagement, HCL will use its next-generation digital transformation and service capabilities to bring two of Finstra's strategic products, namely Fusion Cash Management and Fusion Summit, to the financial services ecosystem.
SAP	HCL is an SAP Global Strategic Services Partner with over 25 years of experience, leading complex SAP transformation programs. Its SAP consultant base has now grown to over 10,000 globally, with local offices and consultants across the Americas, Europe, Asia, and Africa.
IBM	With over 20 years of relationship with IBM, HCL has a dedicated IBM ecosystem business unit, focusing on joint industry solutions and adopting next-generation technology to deliver modernized digital applications, integrated application infrastructure autonomies, and orchestration and advanced cognitive capabilities leveraging IBM Cloud PAK as a platform.

# HCL Technologies | system integration capabilities on Microsoft Azure (page 6 of 6)

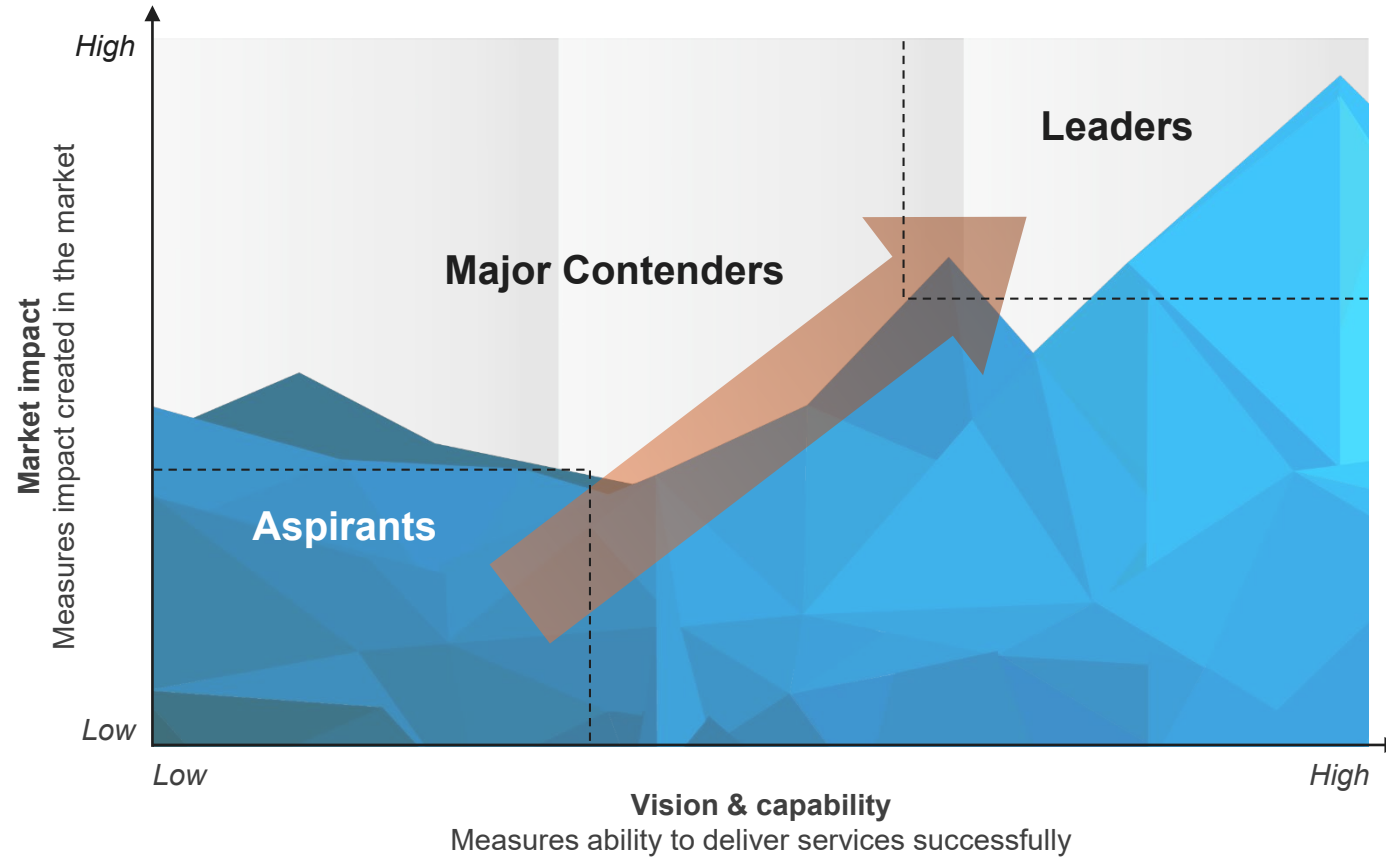
## Investments and recent activities

Investments (representative list)	
Investment name	Details
IoT COLLAB	<ul style="list-style-type: none"> <li>IoT Collab is an exclusive lab at Microsoft's Redmond campus, which is dedicated to the delivery of outcome-based solutions for five focus industries – manufacturing, transportation and logistics, energy and utilities, life sciences and healthcare, and retail</li> <li>This serves as a collaborative incubation lab that lets organizations accelerate IoT initiatives by bringing together technology experts, partners, financial advisors, and other relevant IoT stakeholders</li> </ul>
Lab 21	HCL has opened a dedicated technology development center to showcase the collaboration, investments, and advocacy on Microsoft AI platform / Cortana Analytics in Azure. This allows it to develop and deploy business solutions based on the Microsoft AI platform that will help accelerate adoption and increase value creation for enterprise customers in areas such as business intelligence, big data, and advanced analytics.
Talent	<ul style="list-style-type: none"> <li>Over 30,000 resources have been trained and over 11,000 resources have been certified on Microsoft Cloud and other related Microsoft technologies</li> <li>Global drive for professional and specialty certifications along with programs such as North Star, Cloudspirations, and hackathons</li> <li>Partnered with CloudThat, Koenig, and O'Reilly Media to provide training to the workforce, upgrade their knowledge and skills, and deliver the right course related to technology</li> </ul>
Academic institution partnerships	Partnered with MIT, Stanford Research, Macquarie, RMIT, etc., to innovate and develop cutting-edge solutions

# Appendix

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

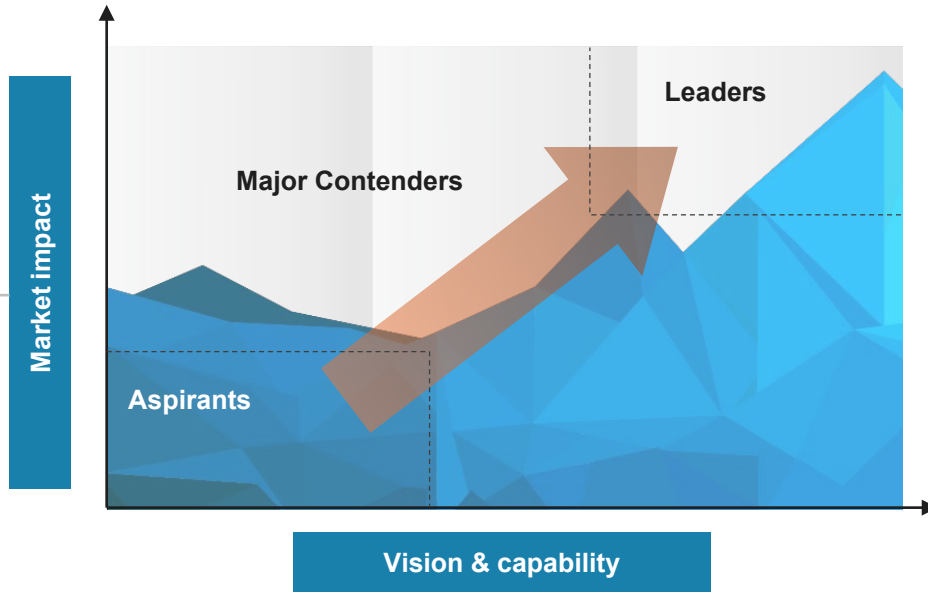
Everest Group PEAK Matrix



# 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



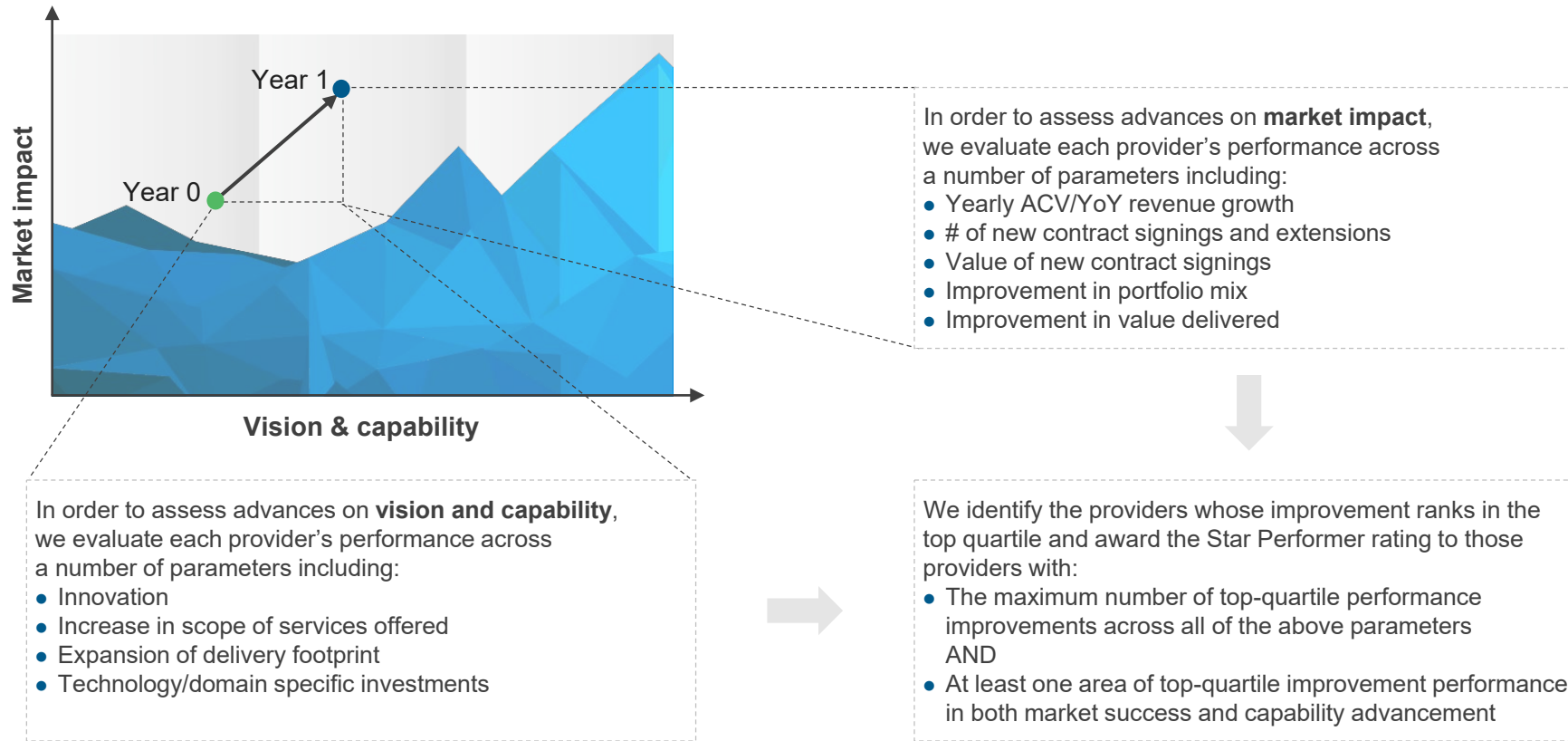
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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

# 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



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 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.



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](http://www.everestgrp.com).

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