



Everest Group PEAK Matrix[®] for Google Cloud Platform (GCP) System Integrator 2022

Focus on HCL Technologies
October 2022



Background of the research

The growth of public cloud adoption by enterprises 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. In addition to a strong enterprise mindshare for data analytics, data management, and AI/ML services, GCP continues to differentiate itself in the overall public cloud market through its unique positioning and support around multi-cloud, open-source technology, and workload portability.

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 SI 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, GCP-specific organization structure, talent development roadmap, GCP-specific solutions and IPs, and co-innovation activities with Professional Services Organizations (PSO) to cater to enterprise demands. There has been an uptick in both organic and inorganic investments by SIs to attain GCP accreditations and competencies.

In this research, we present the assessment and detailed profiles of 26 SIs featured on the [System Integration \(SI\) Capabilities on Google Cloud Platform \(GCP\) 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 GCP services market.

The full report includes the profiles of the following 26 leading GCP SIs featured on the GCP PEAK Matrix:

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

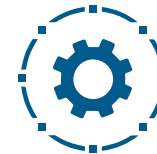
Scope of this report



Geography
Global



Providers
26 leading GCP SIs



Services
GCP cloud services

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

Leaders:

Accenture, HCL Technologies, Infosys, TCS, and Wipro

- Leaders continue to make strategic investments in GCP partnership through GCP 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 GCP PSO
- These players have a credible industry-specific cloud offerings portfolio, GCP-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 GCP infrastructure, application, and data on cloud
- These players have demonstrated strong enterprise mindshare and extensive capabilities in delivering value on cloud by being strategic partners in the customer's modernization journey

Major Contenders:

Atos, Capgemini, IBM, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Mindtree, NTT DATA, Persistent Systems, Quantiphi, Rackspace Technology, Sopra Steria, Tech Mahindra, and Virtusa

- While these players are increasingly investing in building GCP competencies and expertise, their capabilities in offering verticalized cloud solutions powered by GCP and GCP-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 SI capabilities on GCP
- They are making targeted investments in GCP-specific talent development, delivery capabilities, and partnership ecosystem

Aspirants:

Xebia, Mphasis, Orange Business Services, and UST

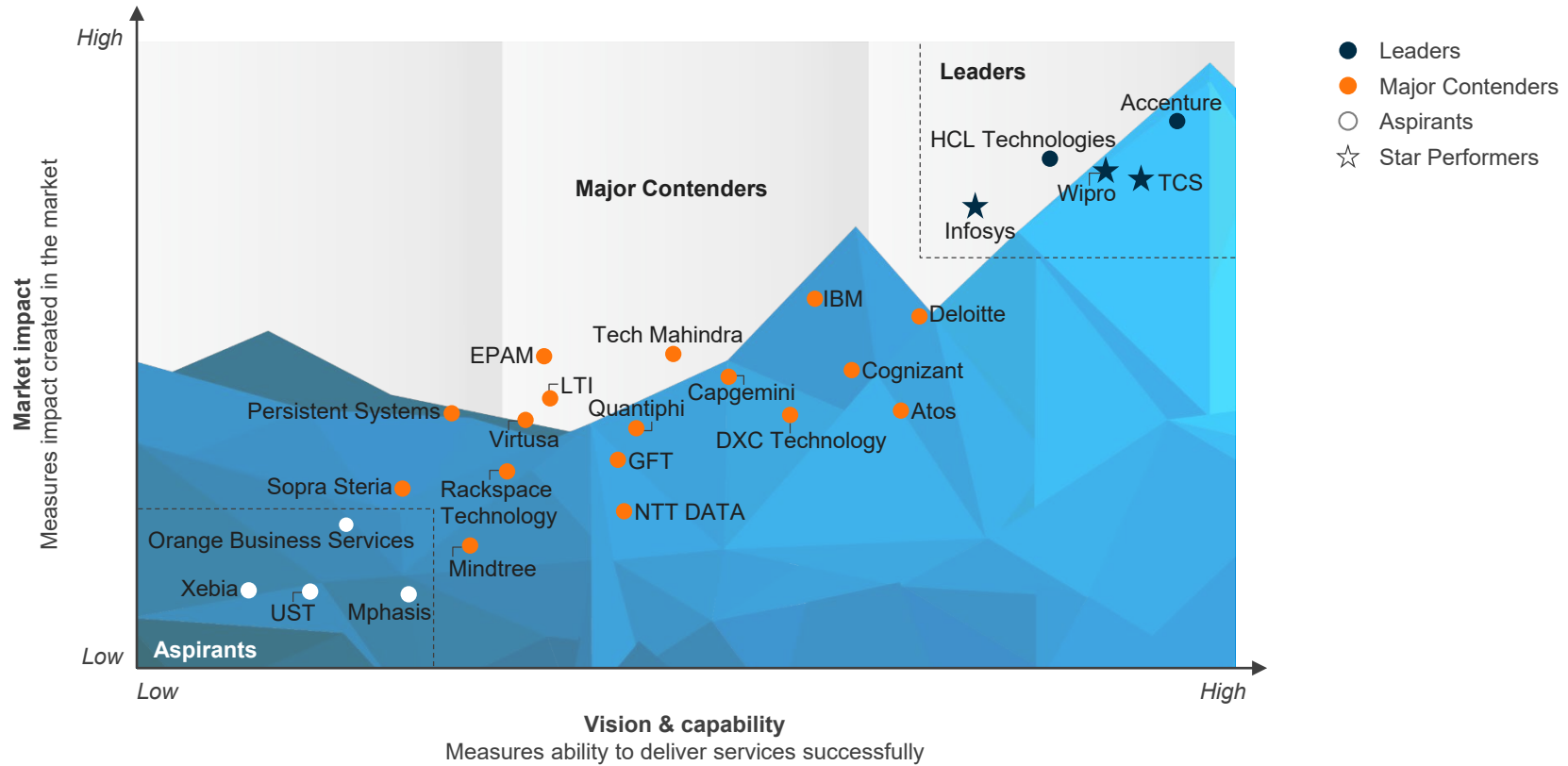
- GCP SI capabilities of Aspirants are in the initial stages of the partnership level in terms of accreditations, qualifications, and competencies
- These players prefer relying majorly on GCP portfolio of industry-specific and pan-vertical solutions instead of investing in natively-developed asset and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

Everest Group PEAK Matrix®

System Integration (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Assessment 2022 | HCL Technologies positioned as Leader



Everest Group System Integration (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Assessment 2022¹












¹ Assessments for Atos, Capgemini, and Deloitte excludes system integrator inputs and are 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 GCP (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 industry-specific solutions will find HCL suitable due to its credible portfolio of GCP-specific solutions offered as part of its CloudSmart suite such as Customer Experience Center and Real-time Claims Platform for Payers
- HCL’s sustainability in cloud solutions on GCP, such as Zero Impact Platform and its GreenEdge Framework, makes it suitable for enterprises with sustainability-focused demands
- Enterprises can accelerate their cloud journey to GCP with various solutions built in HCL’s cloud-native labs such as Kubernetes Migration Platform and its OneClick IP Suite for Google Cloud
- Enterprises will be able to manage and automate their IT operations on GCP with solutions present under HCL’s DRYiCE suite such as DRYiCE iAutomate
- Some clients have highlighted domain expertise and technical expertise on delivering GCP engagements as key strengths for HCL

Limitations

- Enterprises looking for a heavy onshore-centric delivery model need to carefully assess HCL's capabilities as a significant portion of its GCP delivery footprint is currently offshore
- Enterprises considering GCP specializations as a selection criterion might not find HCL suitable as the maturity of its GCP partnership is relatively lower as compared to peers
- Some clients have highlighted project planning and management as a key challenge for HCL in GCP-specific engagements
- Some clients perceive HCL as a delivery partner rather than a strategic advisor. It needs to further strengthen its advisory capabilities and focus on driving innovation through its cloud-native engagements

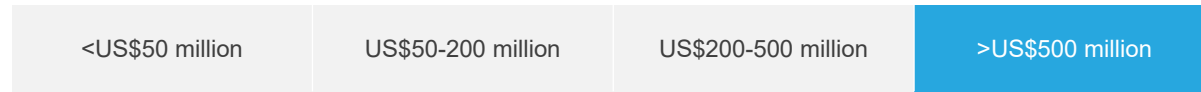
HCL Technologies | system integration capabilities on GCP (page 2 of 6)

Overview

GCP partnership overview

HCL is a Google Cloud Premier Partner and Managed Service Provider (MSP). HCL Google Ecosystem Unit (GEU) is a dedicated Google Cloud BU focused on accelerating customers' digital transformation. It helps customers adopt Google Cloud to modernize their technology estate, infuse innovation, and solve complex business problems with data-driven insights. HCL is also a launch partner for Google Cloud's critical GTM offerings including Anthos, Cortex, ISV modernization, and HPC workloads.

Revenue from GCP-related services (2022)

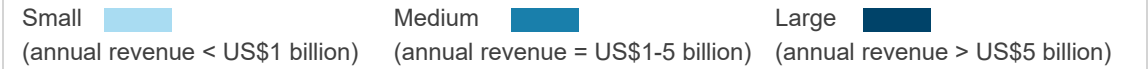


GCP portfolio – key highlights (representative list)

- Over 12,000 professionals trained on Google Cloud resources
- Specializations in infrastructure, SAP, data and analytics, and cloud migration
- Awarded Google Cloud Global Breakthrough Partner of the Year 2021
- Dedicated Google Cloud Native Labs in the US, the UK, and India
- Offerings include data center transformation, SAP on Google Cloud, application modernization, data analytics and AI/ML, and managed services AIOps

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

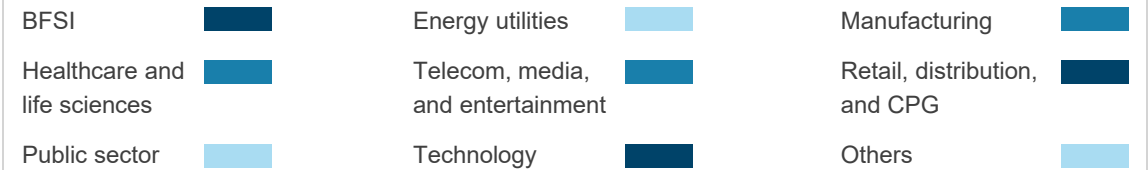
Adoption by buyer group



Adoption by geography



Adoption by industry



Adoption by service segments



HCL Technologies | system integration capabilities on GCP (page 3 of 6)

Case studies

Case study 1

Migration of the entire application landscape to GCP

Client: a financial services company

Business challenge

The client wanted to improve its client engagement through cost optimization and long-term competitive advantage through better and improved services. It also wanted to better serve internal and external stakeholders with transparency and confidence, support industry initiatives, and reduce its carbon footprint.

Solution

- Provided experience and architectural depth for analysis of a complex estate and subsequent solutioning
- Created a cross-functional multi-pillar community comprising technology as well as business domains
- Leveraged reusable templates and proven frameworks to establish an efficient execution layer on GCP
- Established a common governance framework on GCP for delivering on a consistent set of design principles

Impact

- Delivered customer strategic priorities such as scalable migration, wave-based approach aligned to business priorities, secure architecture, and cloud-native services
- Delivered the customer execution priorities such as pattern-based migration blueprint, customer team enablement, and operational readiness
- Ensured broader benefits such as increasing market share and expanding FinTech capabilities

Case study 2

Enabled faster risk detection and fraud prevention using GCP

Client: a large logistics and transportation company

Business challenge

The client wanted to reduce the risk for shipment actions and enable faster e-commerce fraud detection by consolidating and analyzing the data from various sources. It also wanted a smarter cyber security log analytics and reporting system to address business scenarios such as insider threat, high privileged user account misuse, zero-day attack, high risk application misuse, Computer Numeric Control (CNC) detection, and email analytics.

Solution

- Built an enterprise data lake on GCP and migrated data from Hadoop Hive tables to Google Cloud BigQuery
- Built regression models to analyze change in customer or order behavior and detect fraud to raise the alert in the business processes
- Developed and deployed data models to identify the risks and provided the business users a self-service UI to track shipments and the potential risks associated with them
- Ingested the cyber security logs into the data lake and loaded the logs into BigQuery for analytical models
- Migrated data messaging from on-premises Kafka to Google Cloud Pub/Sub

Impact

- Eliminated manual analytics to improve the turnaround time by 60%
- Provided a smart and intelligent system to identify fraudulent shipment orders
- Improved the analytics and reporting services for the cybersecurity BU and improved the turnaround time by 80%

HCL Technologies | system integration capabilities on GCP (page 4 of 6)

Solutions/IPs/products

Proprietary solutions/IPs/products (representative list)

Solution	Details of the tool/solution
OneClick Suite	A holistic accelerator designed for Google Cloud that enables enterprises to realize the business benefits of digital transformation faster by enabling automation across infrastructure, applications, data, and security
HCL Commerce	HCL Commerce is a software platform framework for e-commerce, including marketing, sales, and customer and order processing functionality in a tailorable, integrated package.
HCL DX	HCL Digital Experience (DX) is a trusted solution for enterprise digital experiences. DX unifies business users, developers, and administrators, which in turn enables rich experience that are relevant, trustworthy, discoverable, transactional, data privacy compliant, speedy, reliable, and secure.
HCL Unica	Unica is a cloud native, fully integrated enterprise marketing automation platform that provides precision marketing at scale.
Action Avalanche	A hybrid cloud data warehouse designed to power an enterprise's operational analytics workloads. It enables a path to migrate legacy data warehouses including IBM Netezza and Oracle Exadata to Google Cloud through a hybrid-cloud offering that leverages Google Cloud's Anthos application platform
Real-time claims platform	A real-time claims platform based on GCP Healthcare Data Engine to process and manage medical claims in real time, which reduces the claims processing time from 5 days to 10 seconds
Post market surveillance and product recall management	An offering powered by Google Cloud-based AI/ML/analytics technologies that offer a suite of solutions and services to help the MedTech firms handle end-to-end operational services around the post-market surveillance and complaints management of each medical device
Passenger airport experience	An edge, AI/ ML-based solution that is powered by Google Engine and provides an enhanced passenger experience at the airport for an improved travel support
Operational excellence	An IoT and analytics-based offering that is powered by Google's Vision API and analytics and offers an operational support to the ground staff for quick turnaround for an enhanced passenger experience
Smart Airport Security	An HCL offering based on AI/ML and powered by Google's Vision API for facial recognition and smart analytics to provide security for passengers and airport facilities from unwanted security threats
Zero Impact Platform (ZIP)	A cloud-based solution that identifies global energy optimization potential across the manufacturing plants with reference to best-in-class standards and helps customers achieve their sustainability goals

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

Partnerships

Partnerships (representative list)

Partner name	Details of the partnerships
Commvault	A member of Commvault's Global System Integrator (GSI) program and provides two primary services: <ul style="list-style-type: none"> • BackupNXT: backup and archive via cloud • Infrastructure Utility Services (IUS): subscription model deployment
VMware	A strategic collaboration with VMware and GCP to focus on strategic account planning, capability building, and SWOT team to ensure right solution and pricing. HCL has certifications and accreditations on VMware technologies with professionals trained on VMware
Cisco	Deployment capabilities of Cisco-based solutions in over 120 countries. Its service and consulting portfolio encompasses data center transformation, network transformation, cloud, Utility for Everything (U4X), communications and collaboration, autonomies, and orchestration
Intel	Partnered to build a reference architecture for digital technology platform solutions to accelerate their customers' digital journeys, including data-center management, cloud-native, software-defined networks, AI, and digital workplace
Finastra	Expanded partnership with Finastra 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 Finastra's strategic products, namely Fusion Cash Management and Fusion Summit to the financial services ecosystem
SAP	An SAP Global Strategic Services Partner (GSSP) with over 25 years of experience with complex SAP transformation programs. HCL has dedicated governance with Google SAP teams to collaborate on strategic accounts. Its SAP consultant base has grown globally with local offices and consultants across the Americas, Europe, Asia, and Africa
NetApp	Partnered with NetApp and Google to position NetApp for strategic accounts and use cases
Chronicle	A strategic partnership for cost-effective use of security telemetry to improve Security Operations Center (SOC) productivity and combat modern threats. HCL positions Chronicle on GCP infra as a default security offering in Google Cloud deals
MongoDB	A strategic partnership with MongoDB with dedicated partner teams from both companies to expand Google Cloud business for HCL, Google, and MongoDB

HCL Technologies | system integration capabilities on GCP (page 6 of 6)

Investments and recent activities

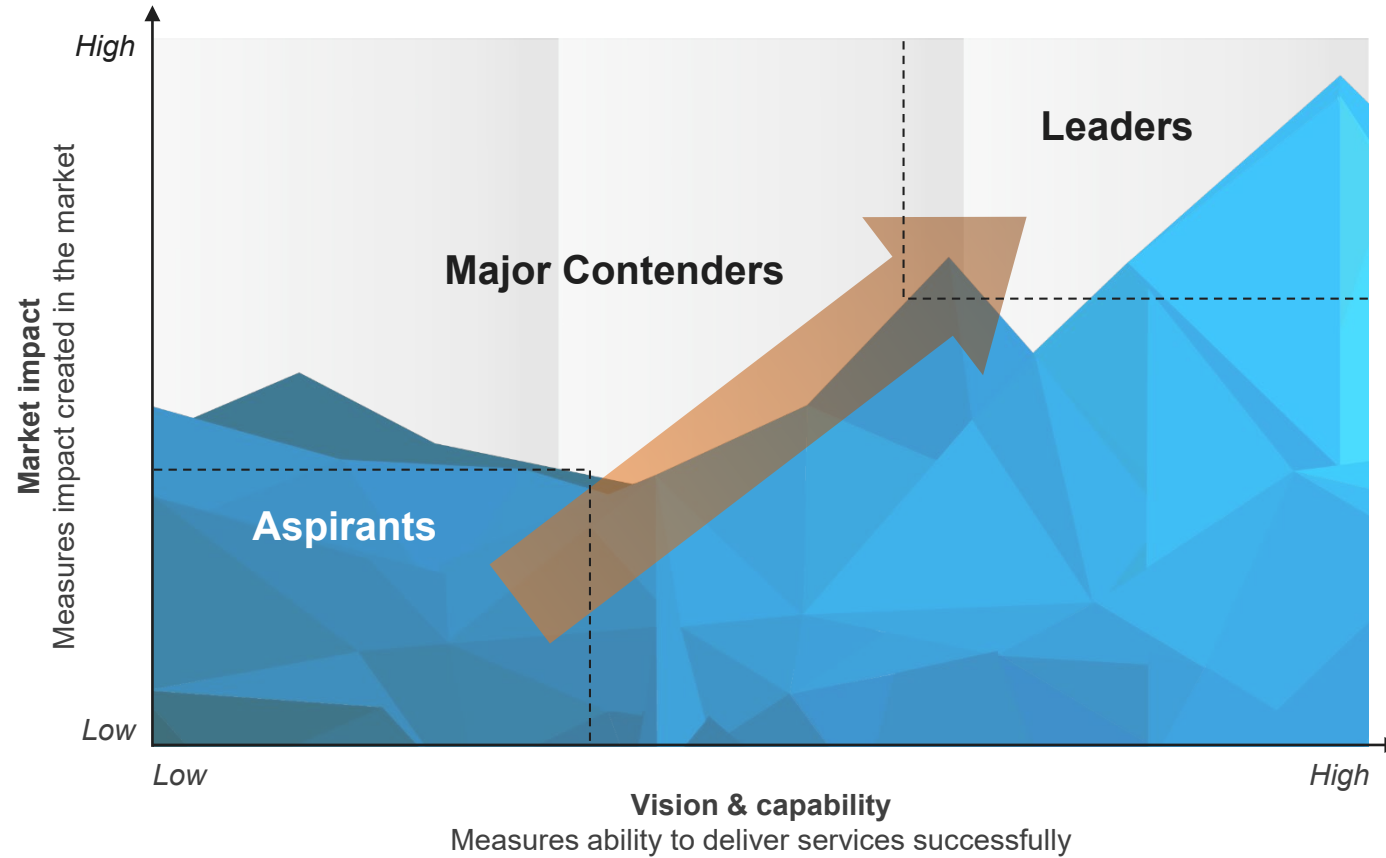
Investments (representative list)

Investment name	Details
ISV CoE	Invested in a dedicated ISV motion-specific CoE to help differentiate HCL Google Ecosystem Unit (GEU) for ISV customers exploring Google Cloud. It helps in rapid proof of concept and leverages best practices from other ISV projects on Google Cloud
Google Cloud Labs	Established three dedicated Google Cloud Native Labs in the US, the UK, and India. These labs provide business-focused design workshops to engage customers and develop MVPs and IP for accelerating customers' Google Cloud adoption

Appendix

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

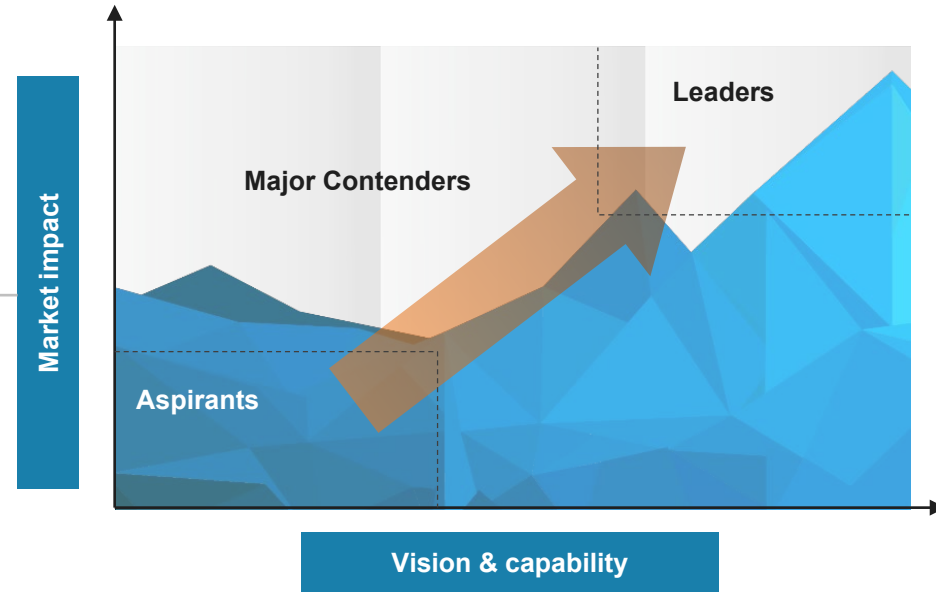
Everest Group PEAK Matrix



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



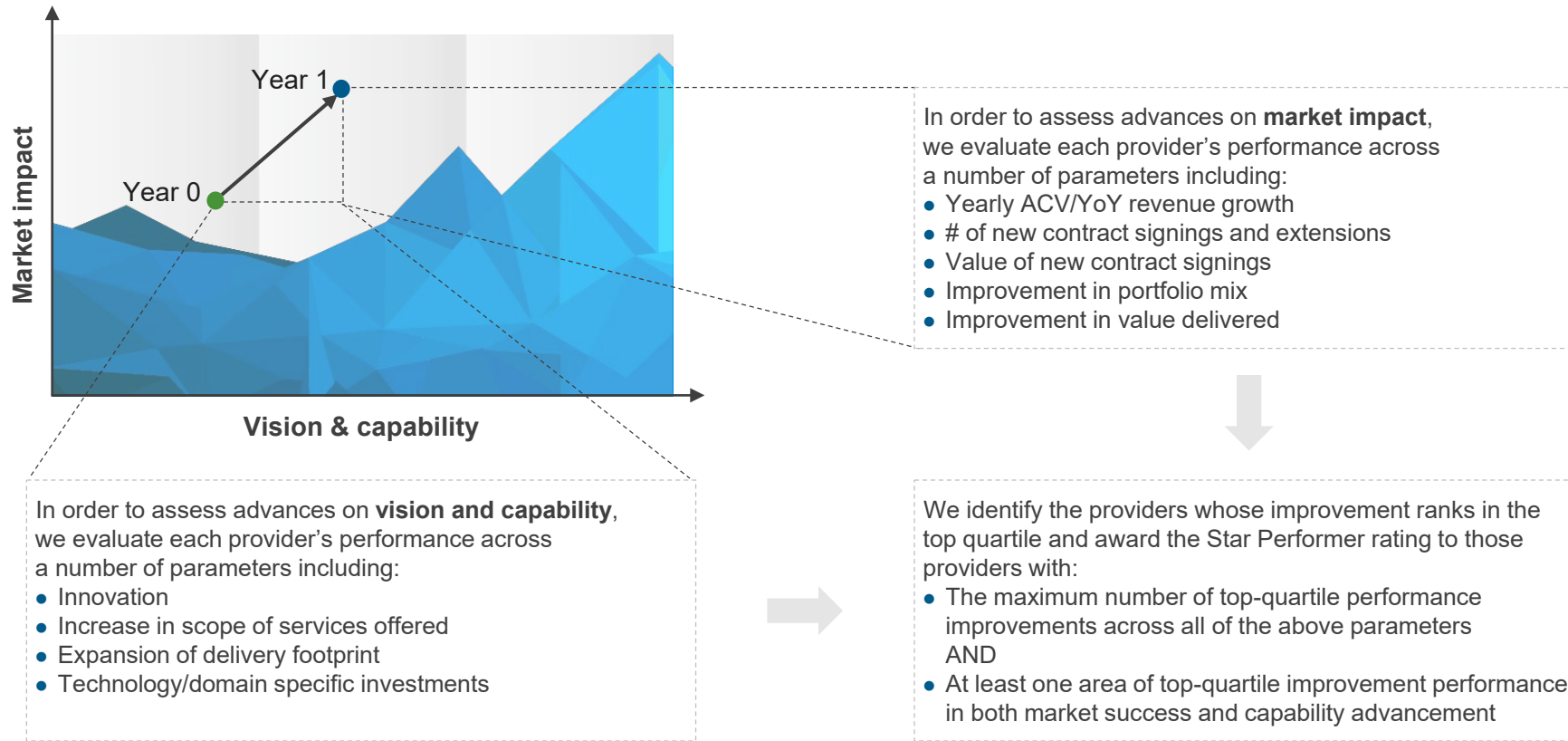
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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.



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