

# Everest Group PEAK Matrix<sup>®</sup> for Aware (Intelligent) IT Infrastructure Services Automation Service Providers 2021

Focus on HCL Technologies  
October 2020



## Background of the research

- The COVID-19 pandemic has become a human crisis of epic proportions, threatening lives and well-being of global communities. Enterprises have found it challenging to cope with the volatility and uncertainty of the situation. COVID-19 has had a significant impact on IT services at a global scale, resulting in enterprise demand reduction, supply chain disruption, challenges in business continuity, cybersecurity risks, and services continuity challenges
- With recessionary signs and muted market demand, many enterprises continue to face pressures to maintain operational vitality and meet financial obligations. Enterprises are aggressively seeking efficiency, optimization measures, and avenues for business growth. Consequently, automation has become one of the key optimization levers for IT infrastructure services, with 74% of enterprises believing that **automation usage** should be increased<sup>1</sup>.
- In this research, we present an assessment of 18 IT infrastructure services automation providers featured on the services Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2020, interactions with leading digital workplace service providers, and analysis of the digital workplace services marketplace.

**This report includes the profiles of the following 18 leading service providers featured on the Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix®:**

- **Leaders:** HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Accenture, Cognizant, CSS Corp, DXC Technology, GAVS Technologies, Genpact, Infosys, Microland, Mphasis, Tech Mahindra, and UST Global
- **Aspirants:** Happiest Minds, Virtusa, and Zensar

### Scope of this report:



**Geography**  
Global



**Service providers**  
18 leading IT infrastructure  
services automation providers



**Services**  
IT infrastructure services  
automation

<sup>1</sup> Based on Everest Group's survey with 50+ CXOs to gauge enterprise response to COVID-19

## Aware (Intelligent) IT infrastructure services automation PEAK Matrix® characteristics

### Leaders:

HCL Technologies, IBM, TCS, and Wipro

- Leaders in the IT infrastructure services automation space display a clear vision, strategy, and well-established capabilities for enabling large-scale automation deployments for enterprises
- Leaders have significant proof points to showcase the value delivered through a combination of intelligent automation and cognitive/AI-driven automation
- Vision, capabilities, and enterprise proof points are balanced across the IT infrastructure services spectrum (e.g., cloud & datacenter, network, workplace, and IT operations)
- Leaders continue to keep pace with the market dynamics through continued investments in technology and services capability development, focusing on next-generation automation concepts such as AI and cognitive computing, and development of next-generation talent such as AI architects and SRE
- Leaders focus on developing IT infrastructure automation capabilities by balancing investments in developing in-house solutions that provides differential value-added services on top of industry-standard automation tools

### Major Contenders:

Accenture, Cognizant, CSS Corp, DXC Technology, GAVS Technologies, Genpact, Infosys, Microland, Mphasis, Tech Mahindra, and UST Global

- Major Contenders have built meaningful capabilities to deliver IT infrastructure services automation for enterprises; however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across IT infrastructure service segments or maturity/complexity of enterprise proof points or both) – this is also reflected in the scale of value delivered by these players (vis-a-vis Leaders)
- While a few players have a clear focus on providing technology-agnostic automation services leveraging industry-standard tools (based on the choice of the customer), the rest have made significant investments in building their IP

### Aspirants:

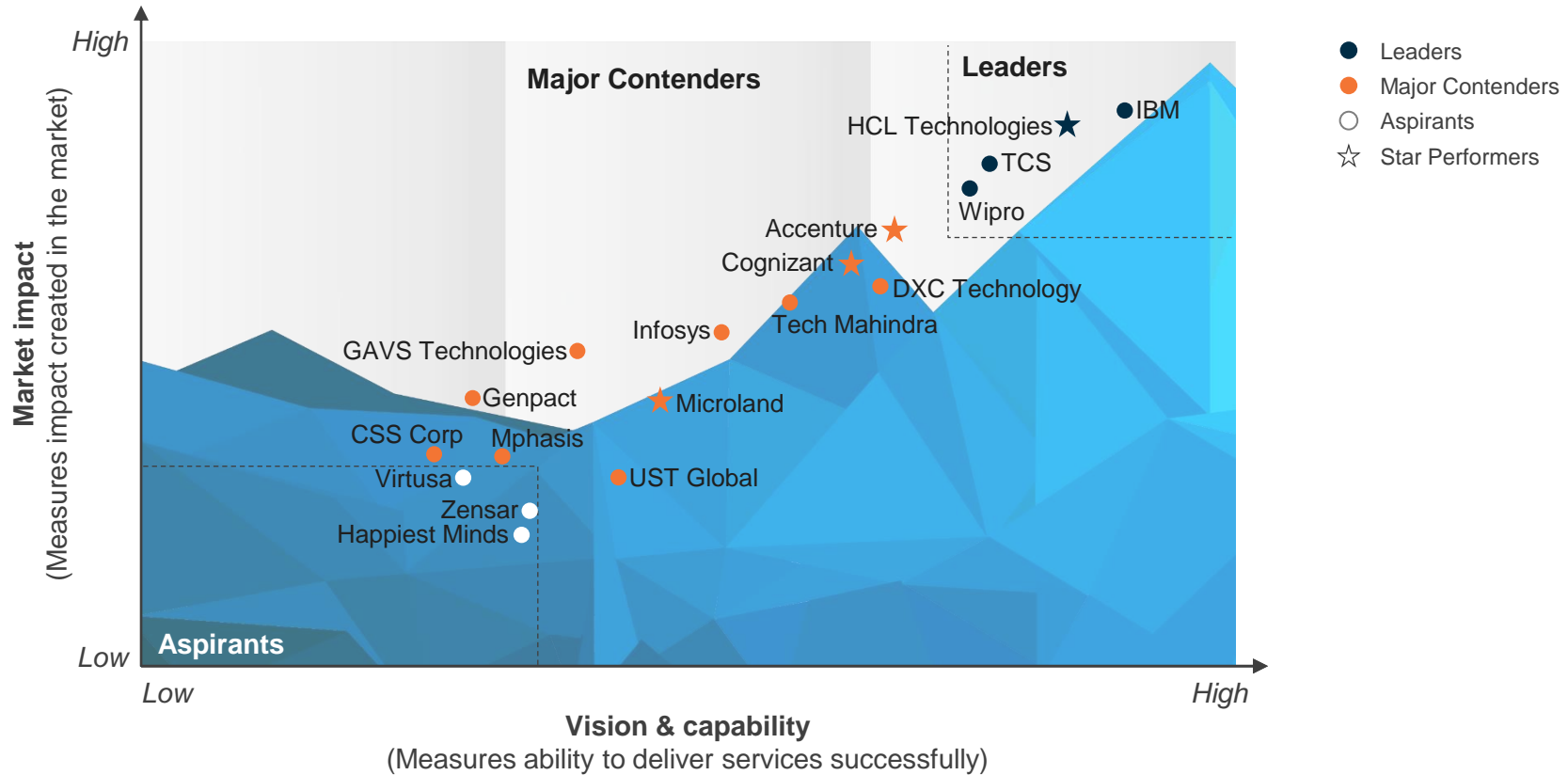
Happiest Minds, Virtusa, and Zensar

- The IT infrastructure services automation business of Aspirants is in the initial stages of growth and is currently undergoing maturation
- While these service providers are making investments for building delivery capabilities and IP/toolsets, their ability to develop meaningful IT infrastructure services automation consulting and implementation services strengths will hold the key to creating market awareness and credibility

# Everest Group PEAK Matrix®

## Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix® Assessment 2021 | HCL Technologies positioned as Leader and Star Performer

### Everest Group Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix® Assessment 2021



Note: Assessment for DXC Technology, Tech Mahindra, and UST Global excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2020)

# HCL Technologies | Aware IT infrastructure services automation services profile (page 1 of 5)

## Overview

HCL's vision for aware IT infrastructure services automation is to harness next-generation AI/ML, cognitive techniques, and RPA in an integrated way to address the problems faced by enterprise customers across industry verticals and enable them to be:

- Highly responsive & resilient
- Highly efficient & available
- Risk free
- Cost-optimized

HCL products & platforms, DRYICE suite of products, and an extensive partner ecosystem, together with the experience and knowledge gained over several years, are the key enablers.

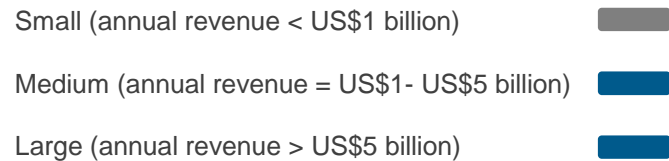
### Adoption by industry

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



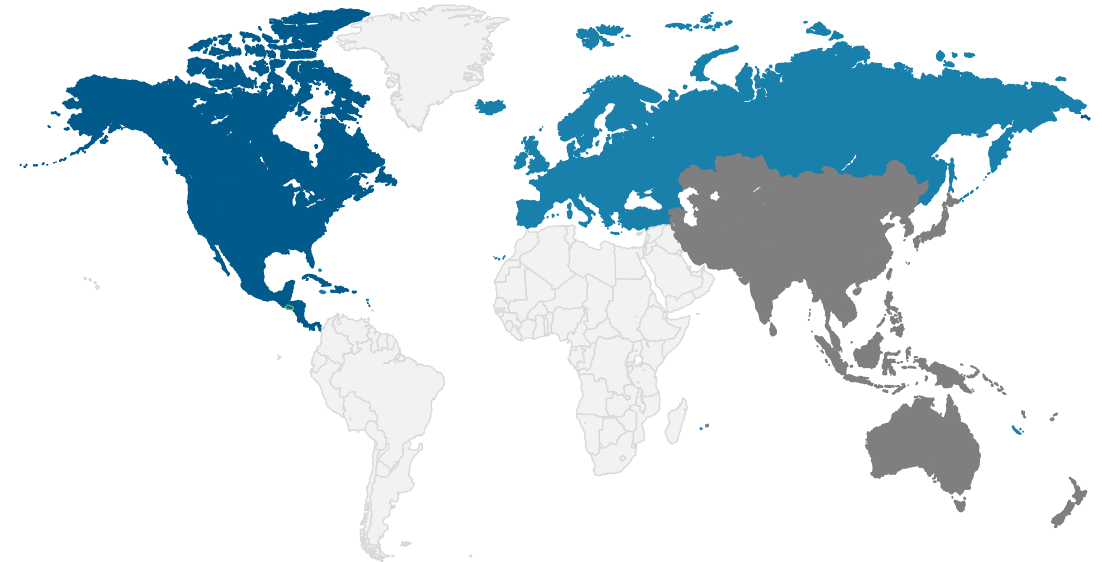
### Adoption by buyer groups

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



### Adoption by geography

High (>25%) Moderate (10-25%) Low (<10%)



# HCL Technologies | Aware IT infrastructure services automation services profile (page 2 of 5)

## Solutions

### Proprietary solutions (representative list)

Solution	Scope	Details of the tool/solution
DRYiCE MyCloud	Cloud	It is a multi-cloud life cycle management product that aims to empower organizations to govern, provision, and manage the cloud infrastructure. It combines data exploration and data visualization in an easy-to-use software product to enable actionable insights for IaaS/PaaS services. With data-driven recommendations and advisories around cost optimization, performance, security, and fault tolerance, it intends to help organizations to mitigate risks, improve efficiency and compliance, and keep costs in control.
DRYiCE iAutomate	Overall IT infrastructure	It is an intelligent runbook automation product, which proposes to bring Artificial Intelligence (AI) and collaboration as key features into the automation domain. iAutomate leverages the power of AI, ML, and NLP capabilities in conjunction with knowledge analysis to provide robust, end-to-end incident remediation, and task automation across the infrastructure and applications landscape.
DRYiCE Lucy	Workplace	It is an AI-powered cognitive virtual assistant, which aims to deliver self-service experience through conversational AI, while addressing any user queries. It intends to mimic human interactions and learn and adapt to user needs through logic-driven conversations by leveraging enterprise-grade ML and NLP services. It is equipped to handle queries via multiple channels, probe users for more inputs (if required), retrieve information from knowledge sources / applications, provide relevant responses, and even take actions on user's behalf. It is claimed to have 600+ out-of-the-box multi-domain use cases including IT that aims to accelerate time to value for organizations.
DRYiCE MyXalytics	Overall IT infrastructure	It is a predictive analytics-driven unified reporting and dashboarding product that intends to provide a 360-degree view of the entire IT operations environment. It ingests data from multiple enterprise tools and aims to create insightful and intuitive reports, and projects the results through tailored, configurable role-based dashboards. It also offers predictive analytics capabilities to help organizations avoid business-critical incidents and disruptions.
DRYiCE NetBot	Network	Network automation platform that aims to automate the complete network life cycle and enable dynamic troubleshooting through AI-based direct acyclic graphs.
DRYiCE GBP	IT Service Management (ITSM)	DRYiCE Gold BluePrint is an ecosystem of best practices, available on both ServiceNow and Cherwell platforms. It attempts to offer an enhanced user experience while managing enterprise IT services and intends to empower executives in making informed decisions.
DRYiCE OptiBot	Workplace	It is an end-user enablement suite of products, which intends to empower end-users to solve IT issues themselves. OptiBot aims to employ shift-left strategy in order to solve problems without the users realizing the problems and focuses on enhancing operational efficiency.
IT vending machine & digital lockers	Workplace	DigiLocker is an IT asset management solution that aims to increase organizations' control and governance over IT consumables such as laptops and display monitors. An automated IT peripheral dispensing solution, which is available 24X7. It aims to ensure self-help through process automation, thus can replace complex supply order and tracking systems.
HCL Workload Automation (HWA)	Cloud	It aims to orchestrate complex workflows across multiple platforms and applications. HWA intends to provide jobs scheduling, management, and monitoring capabilities for continuous automation with an objective to enable control on automation processes from a single point of access and monitoring.
Real-time chat translation	Workplace	An automated solution that intends to provide actionable and understandable real-time translation of chat, which is available 24X7. The aim is to provide users a consistent multi-lingual support at lower cost.

# HCL Technologies | Aware IT infrastructure services automation services profile (page 3 of 5)

## Partnerships

### Proprietary solutions (representative list)

Solution	Scope	Details of the partnership
IBM	Overall IT infrastructure	HCL and IBM have entered a 15-year partnership that aims to build intelligent automation and DevOps solutions. HCL and IBM will work together on future product roadmaps for multiple tools for on-premises, hybrid, public cloud, and Software as a Service (SaaS) platforms. HCL has invested in developing Centers of Excellences (CoEs) across IBM offerings around Bluemix, Watson, analytics, Softlayer, IoT, PureApps, and security.
ServiceNow	Overall IT infrastructure	HCL leverages ServiceNow as a PaaS provider that provides a platform to implement ITSM and non-IT processes for various clients. HCL has integrated ServiceNow with several HCL tools such as Lucy and WorkBlaze to provide end-user automation features such as self-healing and virtual chat assistance.
Splunk	Overall IT infrastructure	HCL is a global strategic MSP and a reseller partner for Splunk. HCL leverages Splunk for IT Operations Analytics (ITOA) within its HCL DRYiCE platform with an aim to offer a streamlined approach for retrieving, reporting, and analyzing IT-related data and to provide insights that help customers meet key objectives for their IT operations. HCL leverages Splunk to offer end-to-end business process flow monitoring solutions.
Cisco	Overall IT infrastructure	Global 360-degree partnership with Cisco. HCL is listed on Cisco DevNet Exchange. Utilizes Cisco Viptela for SDWAN requirements and Cisco ACI for SDN requirements. Cisco is a strategic partner for cloud and compute with co-developed hybrid cloud architectures and blueprint.
BMC	Overall IT infrastructure	Capabilities offered by the partner products are provided to the customers along with best practices developed over the years. Focus areas are datacenter automation and ITSM
Moogsoft	Overall IT infrastructure	HCL leverages Moogsoft with an aim to assist customers derive value from active data, sense faults prior to failure, and rationalize workflow for quicker remediation. HCL is looking at strengthening the DRYiCE Autonomics platform with the AI technology developed by Moogsoft.
Google Cloud	Cloud	HCL Google Ecosystem Business Unit (GEBU) is a partnership that aims to bring together cloud engineering, industry solutions, and execution capabilities from HCL and Google. The objective is to help enterprises accelerate and risk mitigate digital agenda. HCL is an MSP partner for GCP.
Amazon Web Services	Cloud	HCL is a Premier Consulting Partner for AWS and certified in migration competency, MSP, storage competency, and public sector competency, and is a channel partner. HCL has a dedicated cloud-native business unit, and aims to build and provide enterprise cloud computing solutions on the AWS platform. The focus is to provide joint solutions for data & AI, IoT, SAP, DevOps, consulting, and assessments.
Microsoft Azure	Cloud	Launched Microsoft Business Unit; HCL is an Azure Expert MSP; HCL IoTWoRKS was selected as Azure elite partner for 2019. Lab 21 aims to offer solutions based on MS AI platform and Azure Cloud
NexThink/Lakeside	Workplace	Partner for user experience management, self-healing and automation, workplace analytics, proactive support, and virtualization fitment
NetBrain	Network	Partner for ready-to-use product integration for real-time topology mapping, golden baselines, and asymmetric route detection and automation
Equinix	Network	Global partnerships with Equinix for carrier-neutral locations and cloud exchange services
Cherwell	ITSM	HCL offers Cherwell's advanced service management platform for delivery within ITSM process ecosystem with DRYiCE GBP.

# HCL Technologies | Aware IT infrastructure services automation services profile (page 4 of 5)

## Investments and recent activities

### Proprietary solutions (representative list)

Solution	Scope	Details of the investment
Acquisition	Overall IT infrastructure	<ul style="list-style-type: none"> <li>• <b>IBM products acquisition:</b> IBM and HCL announced a definitive agreement, under which HCL has acquired select IBM products. As part of the closure of this deal, HCL takes full ownership of the research and development, sales, marketing, delivery, and support for AppScan, BigFix, Commerce, Connections, Digital Experience (Portal and Content Manager), Notes Domino, and Unica</li> <li>• <b>Strong Bridge Envision:</b> HCL acquired SBE, a US-based digital transformation consulting firm with offices in Seattle, Denver, Atlanta, and New York City. SBE has capabilities in digital strategy development, business agility, program management, business transformation, and organizational change management</li> <li>• <b>Actian:</b> HCL and Sumeru Equity Partners jointly acquired Actian Corp – focused on hybrid data management, cloud integration, and analytics solutions. Through this acquisition, HCL is adding intellectual property to enable global enterprises' digital transformation journey</li> <li>• <b>H&amp;D International:</b> H&amp;D International is a Germany-based IT and engineering services provider. With this acquisition, HCL hopes to significantly increase in-country front-office &amp; delivery capabilities in Germany and strengthen HCL's offerings in the automotive sector</li> <li>• <b>C3i Solutions:</b> C3i Solutions is a specialty clinical &amp; pharma sales force service desk provider. Through this acquisition, HCL aims to enhance vertical capabilities in life sciences and consumer &amp; personal goods vertical, as well as enhance delivery presence in locations such as Bulgaria, China, and Japan</li> <li>• <b>Morado Venture Partners:</b> HCL has invested in Morado Venture Fund, an early-stage investor in enterprise technology start-ups. The investment focus of the fund is AI, robotics, big data, mobility, and collaboration</li> </ul>
R&D labs	Overall IT infrastructure	<p>HCL and Microsoft have jointly set up an R&amp;D lab aiming to develop AI-powered products focusing on Microsoft AI Platform and Microsoft Azure. This dedicated technology development center, "Lab 21," will showcase the deep collaboration, investments, and advocacy on Microsoft AI platform / Cortana analytics in the Azure Cloud. Through Lab 21, HCL aims to develop and deploy high-impact business solutions based on the Microsoft AI Platform to help accelerate adoption and increase value creation for enterprise customers in areas such as business intelligence, big data, and advanced analytics.</p> <p>HCL claims to have invested in 40+ labs worldwide for accelerating the digital journey and enabling change.</p>
Innovation hub	Network	HCL claims to have invested US\$10 million for establishing a network experience center and R&D hub. The hub hosts HCL network services product portfolio with use case demonstrations and product walkthroughs.
Investments	Cloud	HCL Microsoft Business Unit – HCL launched a dedicated HCL Microsoft BU focused on Microsoft technologies. The objective is to extend Microsoft's offerings of business applications, AI/ML, MS Dynamics 365, MS Azure, and IoT to enterprise customers.
Investments	Cloud	Google Cloud Business Unit – HCL launched a dedicated Google cloud BU with an aim to accelerate enterprise cloud adoption.
Investments	Overall IT infrastructure	Invested in a liquid workforce management company "Kalido" that intends to enable organizations to reimagine how to acquire, retain, develop, excite, and exit talent and skills. It allows features such as search, choose, suggest, and deploy resources based on skills, for both internal and external users. Kalido is an AI-powered platform that matches individuals with work and growth opportunities through individual strengths and personas. The objective is to enhance organizational productivity, employee well-being, and frictionless movement of talent between networks.



# HCL Technologies | Aware IT infrastructure services automation services profile (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	Talent footprint	Overall

### Strengths

- HCL has a strong suite of home-grown IPs, which include DRYiCE suite of products, offering comprehensive and integrated coverage of IT infrastructure services automation
- Value proposition of enabling intelligent automation in hybrid cloud (including legacy datacenters), through software-defined infrastructure via a comprehensive service catalog, resonates with market demands
- HCL has developed a highly capable network automation portfolio with a rich set of enterprise use cases, built on principles of programmable networks, vendor agnosticism, and carrier neutrality
- Strong partnership ecosystem with multiple partnership agreements with OEMs, which includes HCL Software's 15-year IP partnership with IBM
- Significant adoption in integrated automation, with enterprise clients realizing noticeable automation benefits enabled by a plethora of use cases spread across IT infrastructure towers

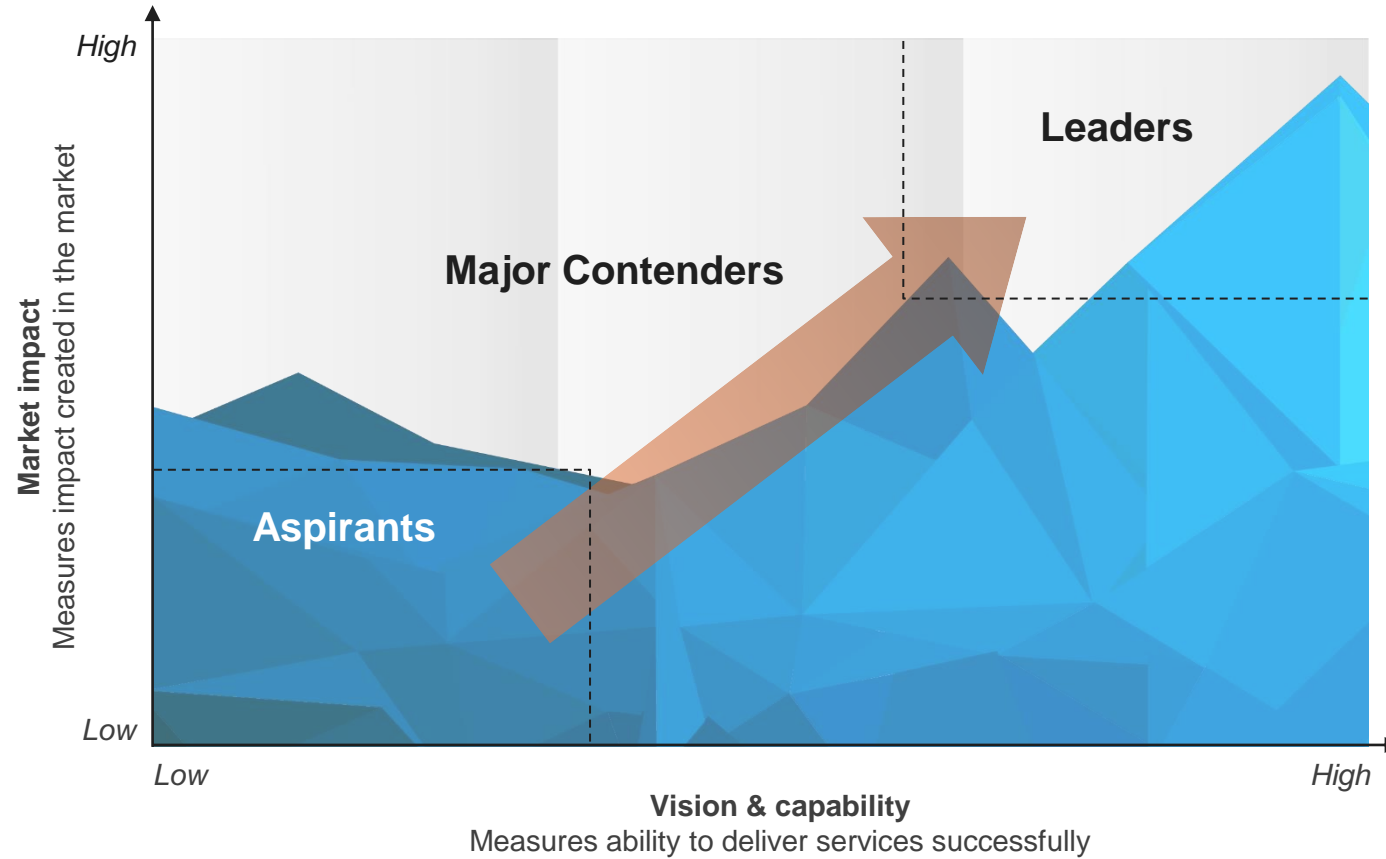
### Areas of improvement

- While HCL has a comprehensive automation portfolio, it needs to develop a business-aligned approach by leveraging more business outcome-oriented metrics
- Further strengthen the capabilities around AI/ML to capitalize on opportunities presented by unsupervised learning and true AIOps
- Needs to accelerate talent development in machine learning algorithms, Natural Language Processing (NLP), and Natural Language Generation (NLG) to deliver higher value to enterprise customers
- A few enterprise clients believe that HCL needs to do a better job of strengthening consulting expertise and bring in more industry-vertical nuances to accelerate value generation

# Appendix

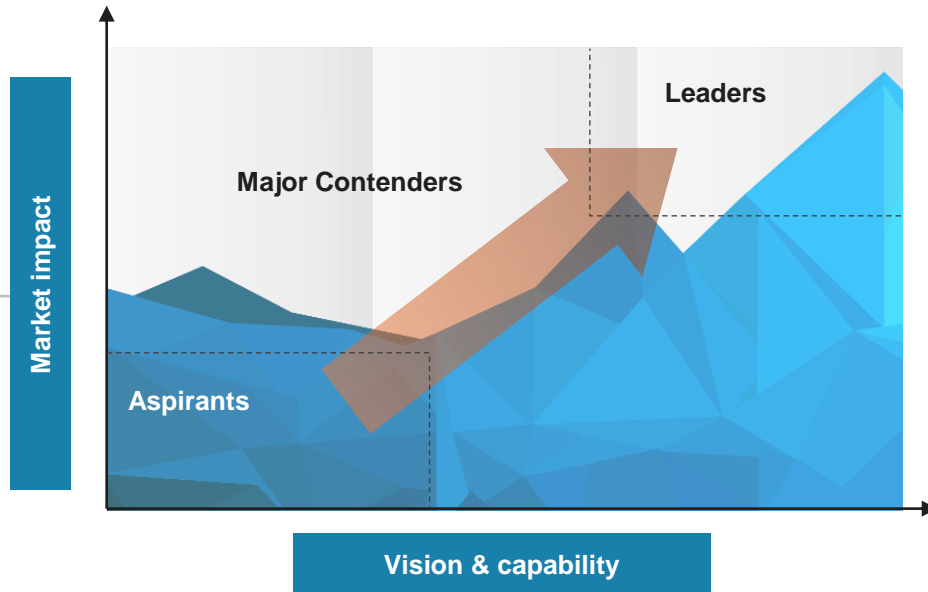
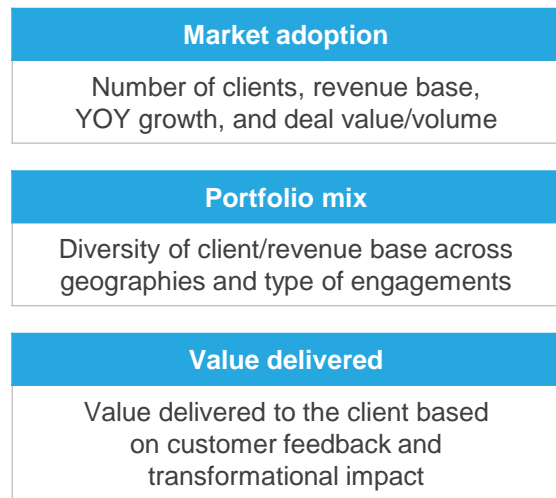
# Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix®

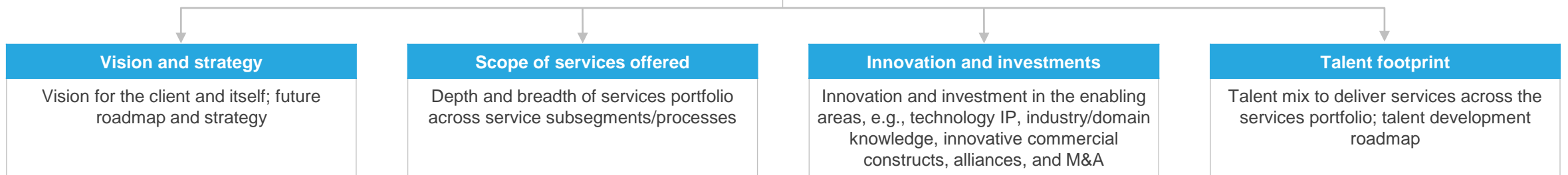


## Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions



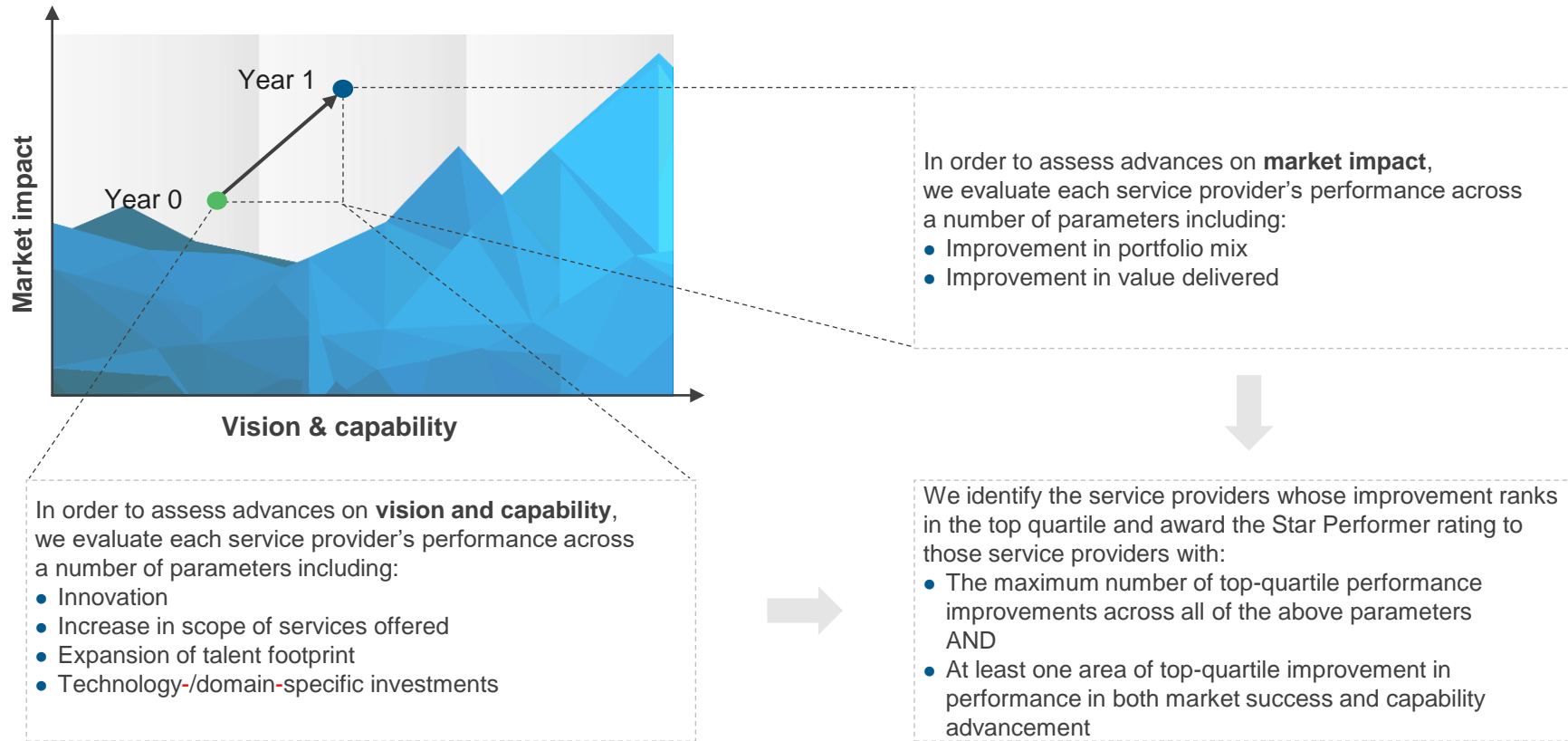
Measures ability to deliver services successfully. This is captured through four subdimensions



# 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 adopts an unbiased and fact-based approach (leveraging service provider / 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 service 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 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 service provider / 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



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