

Everest Group PEAK Matrix[®] for Google Cloud Platform (GCP) System Integrators 2021

Focus on HCL Technologies
December 2020



Introduction and scope

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

As a part of this report, Everest Group updated its classification of 18 system integrators on the Everest Group PEAK Matrix® for SI capabilities on GCP Services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of GCP 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 GCP and includes:

- HCL Technologies' position on the SI capabilities on GCP Services PEAK Matrix®
- Detailed GCP 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 experienced a dramatic shift, from a skeptical outlook 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 saw 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
- Despite being a late entrant when compared to AWS and Azure, GCP has registered good growth and captured a meaningful share in the hyperscaler market. GCP's innovation-driven culture and offerings across infrastructure, platforms, data, and next-generation segments have helped it create a niche amongst the hyperscalers. With the recent restructuring of sales team and renewed go-to-market strategy, GCP has seen a spike in demand for its offerings. Rapid adoption, coupled with management complexities and talent crunch, is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the GCP landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we present an assessment of 18 GCP cloud system integrators featured on the SI capabilities on GCP PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with GCP system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 18 system integrators on the GCP PEAK Matrix® Assessment 2021:

- **Leaders:** Accenture, Atos, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa
- **Aspirants:** Aspire Systems, Coforge, and UST Global

Scope of this report:



Geography
Global



System integrators
18 leading cloud system integrators



Services
Cloud services

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Services characteristics

Leaders:

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

- Leaders have established successful businesses in GCP 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 such as data & analytics and AI/ML and build strategic roadmaps for GCP services (internal IP/tools, partnerships, co-innovation labs, and CoEs)
- Leaders have a strong focus in 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:

Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa

- Major Contenders in the GCP services space include born in the cloud as well as established system integrators
- While global players strongly leverage/include their assets and data center footprint along with their GCP 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 GCP services spectrum, as well as in increasing their global coverage

Aspirants:

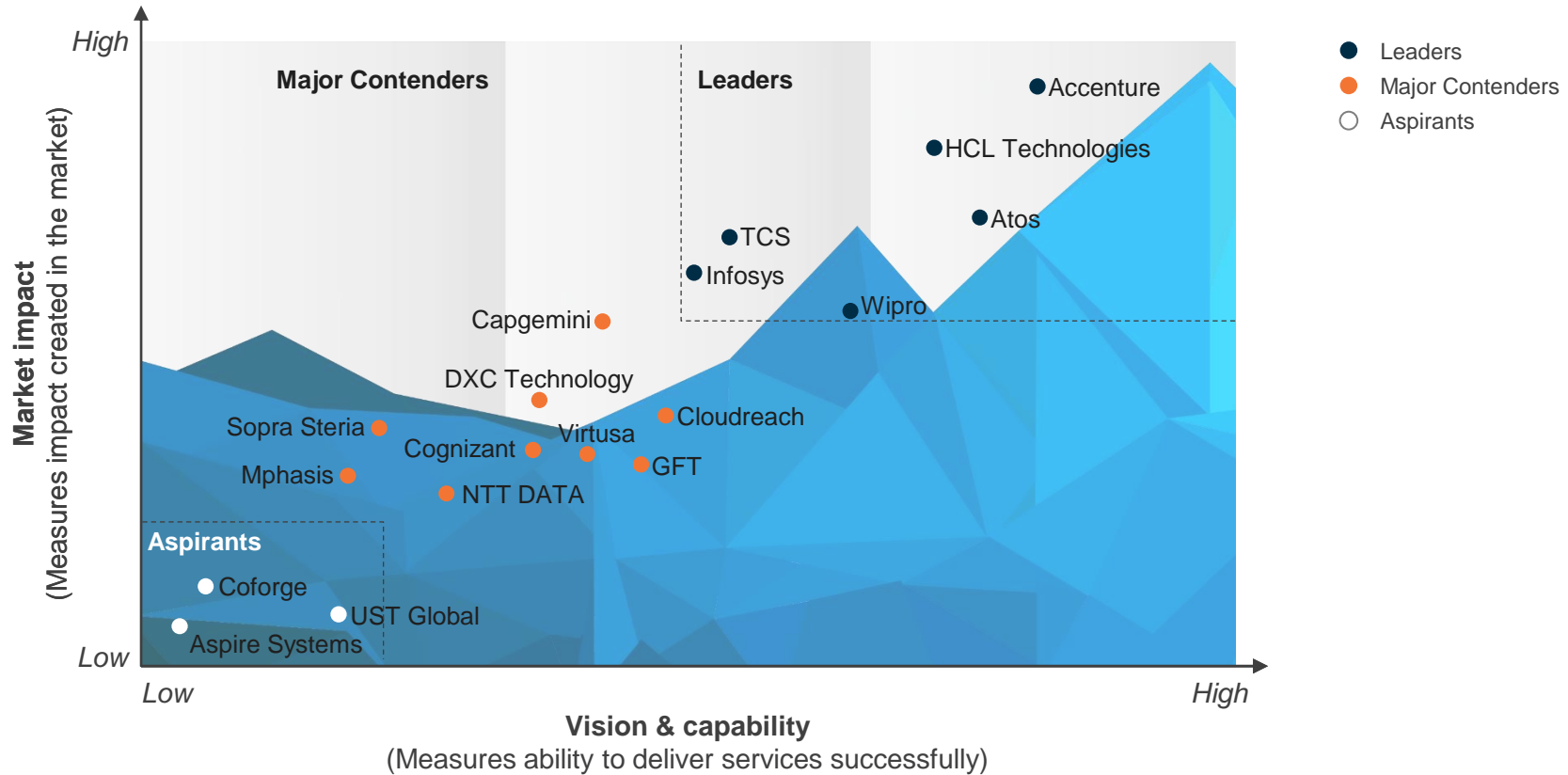
Aspire Systems, Coforge, and UST Global

- The GCP 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 GCP to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021 | HCL Technologies positioned as Leader

Everest Group System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021



Note: Assessment for Atos is based on Everest Group's proprietary Transaction Intelligence (TI) database, system integrator's public disclosures, and Everest Group's interactions with enterprises that have adopted GCP
 Source: Everest Group (2020)

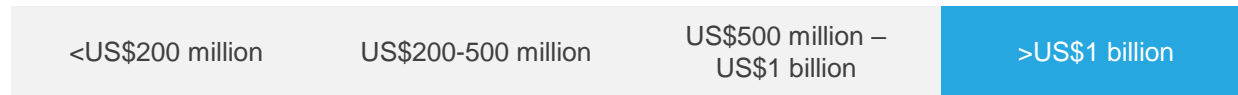
HCL Technologies | system integrator capabilities on GCP (page 1 of 5)

Overall cloud services overview

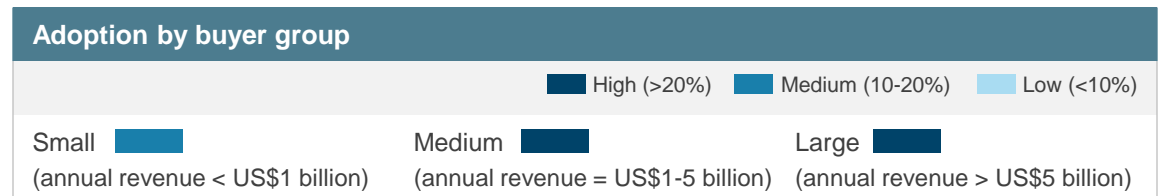
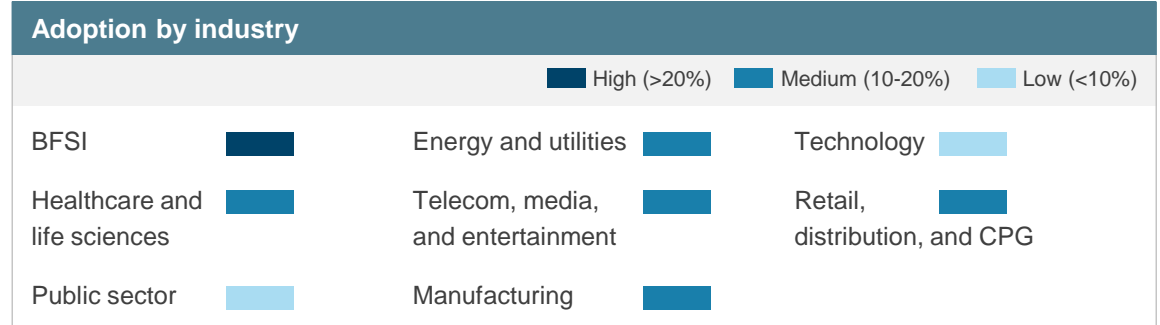
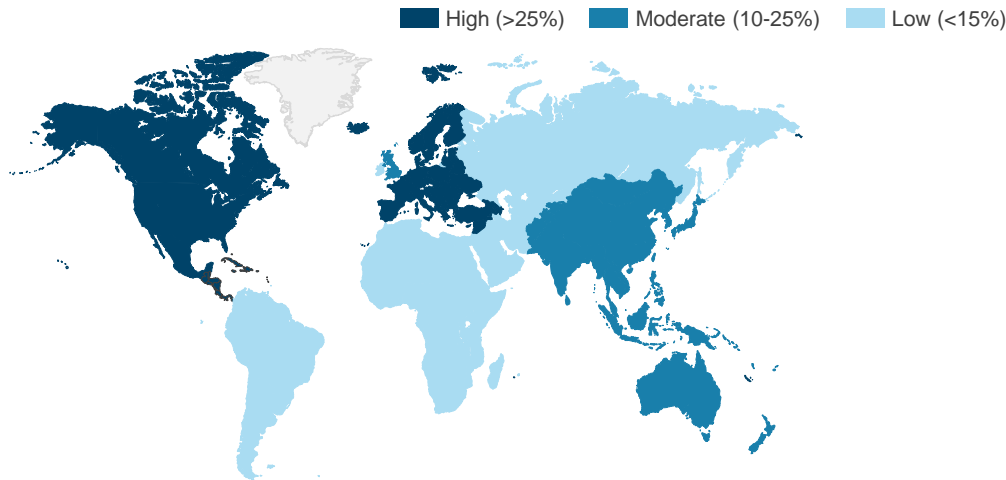
Cloud services vision:

HCL Technologies provides a suite of cloud services that delivers smarter digital experiences across the cloud value chain. It offers a full spectrum of services from the 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 approach to manage multi-cloud 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)

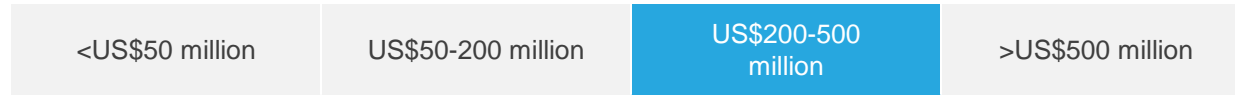
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Capabilities on GCP overview

GCP partnership overview:

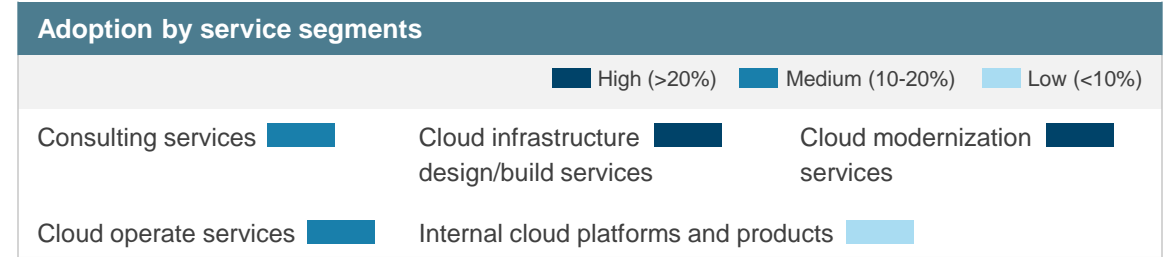
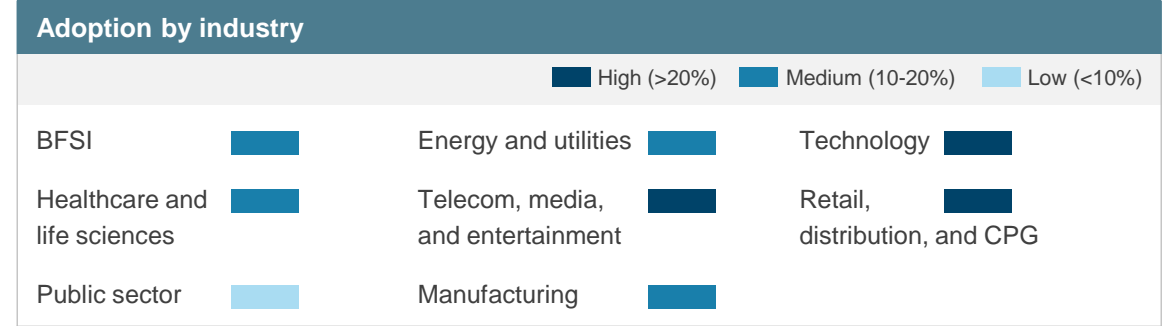
Awarded as “Breakthrough Partner of the Year 2019” by Google, HCL aims to accelerate enterprise cloud adoption through a dedicated Google Cloud ecosystem business unit. This integrated partnership brings together cloud engineering, industry solutions, and execution capabilities from both HCL and Google with joint investments in setting up Google Cloud-specific labs across the globe to enable experience-driven cloud transformation journey for their clients.

Revenue from GCP-related services (2019)



GCP portfolio – key highlights (representative list)

- HCL has developed horizontal GCP solutions for accelerating adoption, which include D-Prizm (AI-based application assessment), OneClick (migration to Cloud) and U2L (Unix to Linux Migration), and ADvantage Cloud (migration to Cloud) and ADvantage Migrate (assessment of code in replatforming scenarios)
- Key use cases delivered on GCP include:
 - Workplace transformation and collaboration with G-Suite
 - Google Cloud data, AI, and ML solutions
 - Hybrid and multi-cloud deployments with Anthos and application modernization
 - SAP workload migration to GCP
 - data center exit and transformation such as mainframe modernization



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

Key solutions

Proprietary solutions (representative list)	
Solution name	Details
InfraStudio (LandingZone for Google Cloud)	Accelerator to enable enterprises realize the business benefits of digital transformation. With a single click, HCL's OneClick foundation and migration can help enterprises automate deployment of landing zones and configuration with competencies in DevOps, security, and migration
MigrationStudio (Migration to Google Cloud)	Implement cloud best practices like multi-account structure, security controls, self-service with guardrails, scalability, and extensibility from the initial landing zone environment, irrespective of the methodology used. Migrate workloads to cloud in a phased approach with appropriate guidance and best practices for all steps of the cloud migration journey
SAPStudio (Migrate SAP to Google Cloud)	HCL SAPStudio for Google Cloud enables rapid delivery of SAP platform by templating 50+ use case for SAP implementation, thereby offering the flexibility to deploy SAP software with custom installation leading to reduced provisioning times
DataStudio (Migrate DW to Google Cloud)	Accelerator to enable multiple data sources such as Teradata and Redshift to Google Cloud. DataStudio for Google enables auto provisioning the BigQuery infrastructure on Google Cloud and automate the transformation of Teradata and AWS Redshift to BigQuery
HCL Gatekeeper	Automates manual data reconciliation and validation efforts. Helps identify and triage data problems upfront to save valuable effort and cycle time. It improves data trust and reduces risk of error. It supports heterogeneous data platforms
Model Manager	Manages the data science life cycle management for AI/ ML projects
ADvantage Modernize	Homegrown modernization platform that accelerates application modernization
MyCloud	A 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 continuous compliance checks 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 Sketch	Internally built accelerator framework for development and management of data migration pipelines based on open-source technologies. It has connectors to most industry standard data access methods and data sources

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

Case study, investments, and recent activities










Case study	
SAP HANA migration	
Client	Leading producer and distributor of hot and cold beverages globally
Business challenge	Client wanted to simplify and streamline complex IT environments (four Data Centers, 250+ SAP and non-SAP applications, 1800 servers), reduce cost of operations, and deliver faster time-to-market
Solution	<ul style="list-style-type: none"> • DC exit leveraging HCL's unique OneClick foundation build, deployment, and migration IP tool set with focus on technology transformation and SAP HANA migration for 12 TB SAP HANA workload • Multi-cloud platform selection based on workload requirements with GCP for SAP, non-SAP, data warehouse, and AI-/ML-based workloads • Google Cloud native services for compute, storage, and load balancers • Infrastructure as Code (IaC)-based deployment methodology with application and SAP transformation
Impact	<ul style="list-style-type: none"> • Lowest latency achievement for best application performance • DC exit in record four months; helping to reduce the cost of operations • Enabled cloud technologies to enable faster go-to-market

Recent investments and activities (representative list)	
Development	Details
Partnerships	Expanded partnership with HCL Actian Avalanche on GCP. Enabling Snowflake competitive solution offering on GCP for enterprise customers
Delivery centers	<ul style="list-style-type: none"> • Invested in setting up three Google Cloud-specific labs, one each in Dallas, London, and Noida as part of its new business unit for Google • 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
New solution development	HCL is working with GCP in developing solutions in the following areas: Oracle to Cloud SQL, VMware on GCP, IBM Power Series, and mainframe migration to GCP

HCL Technologies | system integrator capabilities on GCP (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

- HCL has a dedicated Google Cloud eco-system business unit that focuses on cloud engineering, industry solutions, and execution capabilities
- The company has developed GCP specific IPs such as SAP migration to cloud, BigQuery migration, and data processing framework
- It has invested in three dedicated labs focused on Google Cloud to develop solutions around Anthos, BigQuery, and Velostrata
- HCL has created industry-specific offerings in areas including open banking, Real Time Payments, and Programmable Retail Bank and horizontal offerings such as D-Prizm, OneClick, and Advantage Cloud
- It has “Google Specializations” on cloud migration and SAP on Google Cloud. It is a certified MSP and is a Breakthrough Partner of the Year, 2019

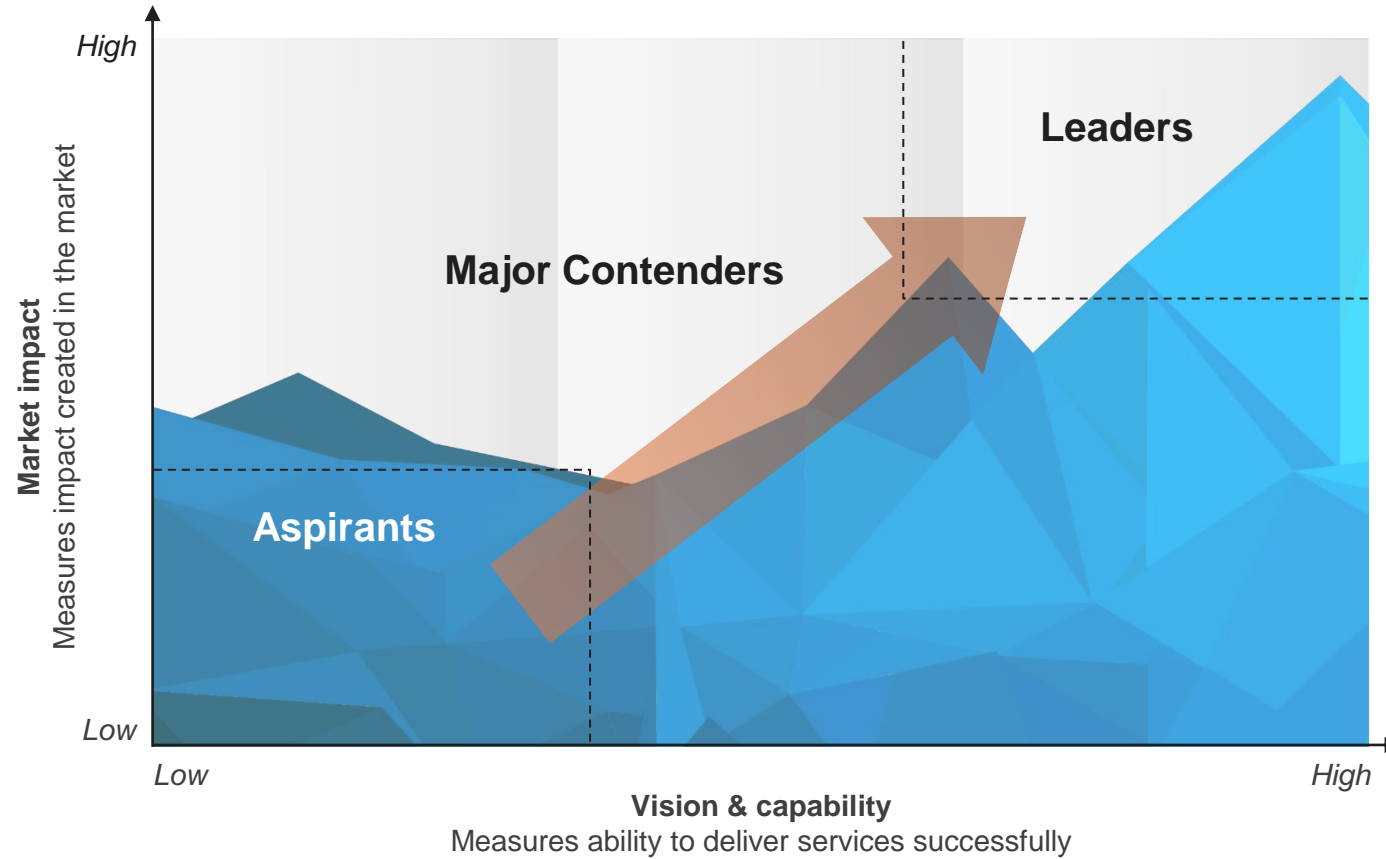
Areas of improvement

- HCL needs to be proactive in offering best practices and automation capabilities on GCP
- 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
- To further augment existing capabilities, it should focus on achieving ‘Google Specializations’ in application development, data analytics, machine learning, and infrastructure
- Despite their investments in developing talent on GCP, clients have rated them low on the ability to prescribe the right expertise to set up and scale GCP landscape

Appendix

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

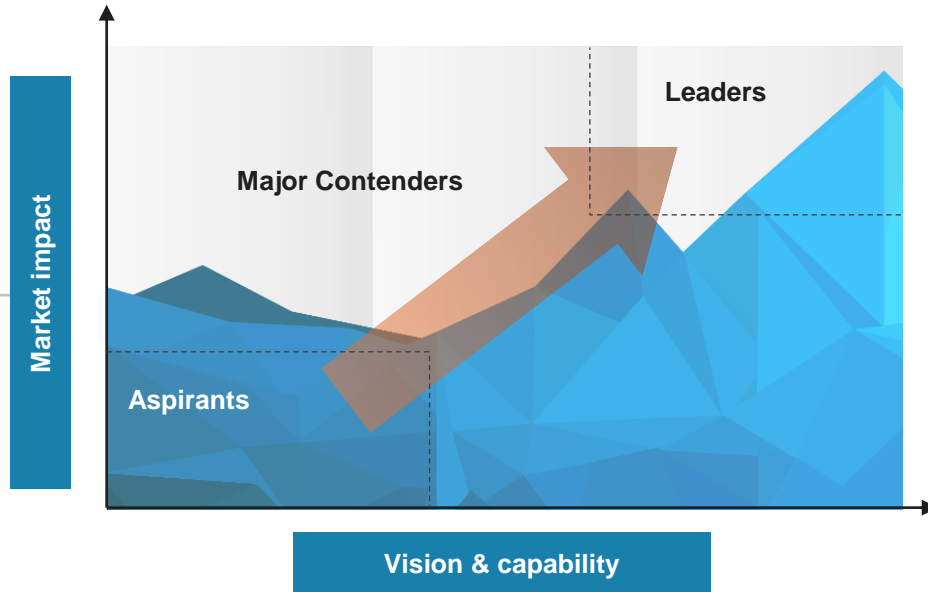
Everest Group PEAK Matrix



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 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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