

Network Transformation and Managed Services PEAK Matrix® Assessment 2021

July 2021: Complimentary Abstract / Table of Contents



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Benchmarking

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Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

1. Introduction and overview	05
• Research methodology	06
• Key information on the report	07
• Background of the research	08
• Focus of the research	09
2. Section: Network transformation and managed services PEAK Matrix® characteristics	10
• PEAK Matrix® framework	11
• Everest Group PEAK Matrix® for network transformation and managed services	14
• Characteristics of Leaders, Major Contenders, and Aspirants	15
• Service provider capability summary dashboard	17
3. Section: Enterprise sourcing considerations	21
• Leaders	21
– Accenture	22
– HCL Technologies	23
– TCS	24
– Wipro	25
• Major Contenders	26
– IBM	27
– Infosys	28
– Microland	29

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Contents

• Major Contenders (continued)	
– Orange Business Services	30
– Tech Mahindra	31
– Zensar	32
• Aspirants	33
– Computacenter	34
– Mphasis	35
4. Other service providers	36
• Other relevant service providers for network services	37
5. Appendix	39
• Glossary	40
• Research calendar	41

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Background of the research

The COVID-19 pandemic fueled the digital transformation initiatives of enterprises to ensure business continuity. With a work-from-home culture prevalent for the past 12-18 months, there has been a shift in network strategies of enterprises to provide seamless and secure connectivity to their workforce. Rapid cloud adoption along with other digital transformation initiatives have further accelerated the enterprise needs to adopt next-generation network technologies. The network services industry is further bound to undergo radical changes in enterprise needs and priorities, as next-generation network technologies such as private 5G network, SD-WAN, and IoT/edge networks come into play. Service providers need to realign their strategies with these shifts in the network services market to ensure that they can provide next-generation network services to enterprises.

In this research, we present an assessment and detailed profiles of 12 network service providers featured on the network transformation and managed services PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading network services providers, client reference checks, and an ongoing analysis of the network services market.

This report includes the profiles of the following 12 leading network service providers featured on the Network Transformation and Managed Services PEAK Matrix® :

- **Leaders:** Accenture, HCL Technologies, TCS, and Wipro
- **Major Contenders:** IBM, Infosys, Microland, Orange Business Services, Tech Mahindra, and Zensar
- **Aspirants:** Computacenter and Mphasis

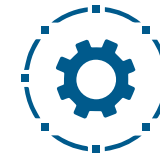
Scope of this report:



Geography
Global



Service providers
12



Services
Network transformation
and managed services

This report provides an insight into network transformation and managed services

Consulting/services

Strategy, roadmap formulation, readiness assessment, Total Cost of Ownership (TCO) analysis, etc.

Design and build services

Enterprise network designs, data/ethernet cabling, server configurations, switch & router setup, wireless setup, etc.

Managed services

L1, L2, L3, and L4 support, network provisioning, management, administration, troubleshooting, monitoring, performance optimization, network availability analysis, capacity planning, configuration support, network testing, and network policy management.

Focus of this research

Network transformation and managed services – market definition

Traditional network services

Consulting, design & build, and managed services across traditional network services, which involve network components such as hardware life cycle management (equipment sourcing, engineering and integration, configuration, testing, field survey, installation, maintenance & support, and retire equipment), physical routers, switches, firewalls, gateways, etc.

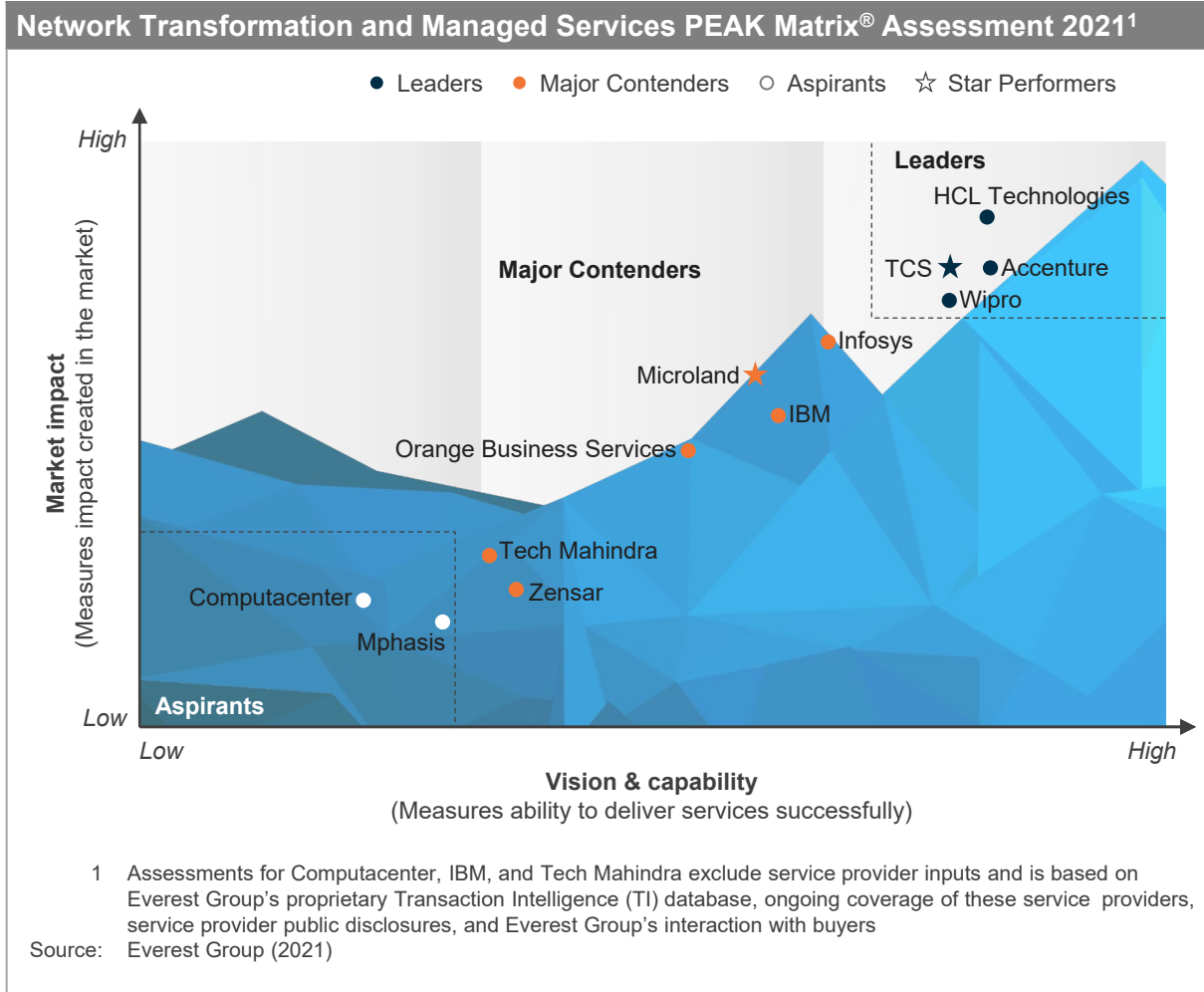
Next-generation network services

- Network Function Virtualization (NFV)
- Software Defined Networking (SDN)
- Network automation
- Network analytics
- Wi-Fi 6
- Private 5G
- Software Defined Local Area Network (SD-LAN)
- Software Defined Wide Area Network (SD-WAN)
- Intent-Based Networking (IBN)
- Edge/IoT networks
- Network-as-a-sensor
- Network-as-a-service
- Multi-cloud networking

Exclusions from this assessment:

MPLS & internet connectivity services, 4G/5G mobile network services (excluding private 5G), PBX & VoIP services, and IT services for telecom providers

This study offers three distinct chapters providing a deep dive into key aspects of network transformation and managed services market; below are three charts to illustrate the depth of the report



Capability assessment *Illustrative example*

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	●	●	●	○	○	○	●
Service provider 4	○	○	○	○	●	○	●	○	○
Service provider 5	○	○	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers *Illustrative example*

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

- Service provider 1 has made credible investments in developing its IPs and solutions for network automation and SDN
- It has developed industry-wide use cases for several next-generation network technologies including private 5G, SDN, and cloud-native networks

Limitations

- Service provider 1 rarely engages in standalone network transformation engagements and its network services are usually bundled along with other digital transformation initiatives
- It has multiple local partners for certain geographies, leading to less control on service quality

Research calendar

Cloud and Infrastructure Services (CIS)

Published Planned Current release

Flagship CIS reports

Release date

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

December 2020

Service Integrator (SI) Capabilities on Microsoft Azure Compendium 2021

December 2020

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services Compendium 2021

December 2020

Cloud Hyperscalers: A Critical but Not the Only Building Block of Enterprise IT

June 2021

IT Managed Security Services (MSS) PEAK Matrix® Assessment 2021

June 2021

State of the Market: IT Infrastructure Automation Services

June 2021

Network Transformation and Managed Services PEAK Matrix® Assessment 2021

July 2021

SD-WAN Services PEAK Matrix® Assessment 2021

Q3 2021

State of the Market: IT Infrastructure Services (Private & Hybrid Clouds)

Q3 2021

Thematic CIS reports

Release date

Future-proofing Enterprise Transformation with Cloud-agnostic Managed Services

February 2021

Upcoming Contract Renewals – Infrastructure Services 2021

March 2021

Enterprise Pulse Report: From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World

March 2021

Future of SecOps: Security Operations for the Digital World

Q3 2021

Contracting for the cloud

Q3 2021

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