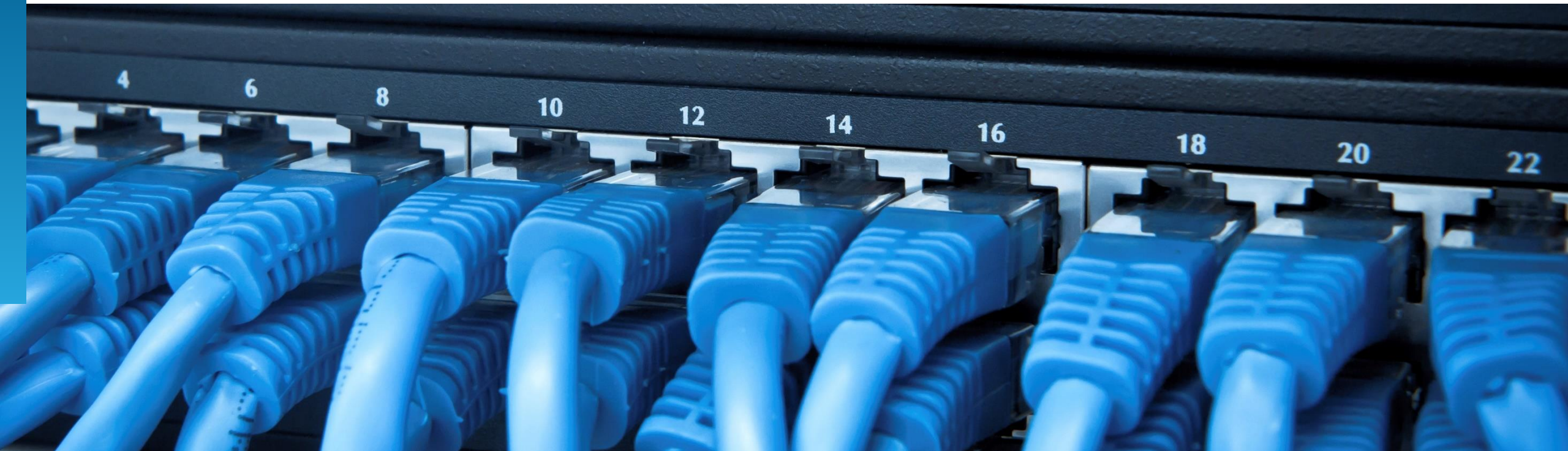


Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023

August 2023: Complimentary Abstract / Table of Contents



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Background of the research

Network transformation has become a fundamental pillar of robust business and technology transformation with digital enterprises increasingly recognizing the pivotal role played by networks. Enterprises are actively undertaking network transformation initiatives by leveraging state-of-the-art network technologies to optimize performance, automate operations, increase efficiency, accelerate digital transformation, and enhance user experience. However, in the face of declining global macroeconomic conditions, enterprises are prioritizing the realization of Return On Investment (RoI) from their previous investments, particularly those made during the pandemic, before allocating resources to new and less mature technologies such as 5G and edge computing. To meet the evolving needs of their customers, network SIs are making significant investments to build their portfolio. They aim to provide comprehensive end-to-end network transformation solutions, encompassing consulting to managed services, and incorporating next-generation technologies such as multi-cloud networking, Network-as-a-Service (NaaS), network automation, Internet of Things (IoT), and wireless networks. Additionally, they are strategically realigning their approach to networks by prioritizing use case relevance and value creation. They are developing industry-specific and AI-driven contextualized solutions that cater to the unique requirements of different sectors. In doing so, SIs can offer customized network solutions that drive tangible business outcomes.

In this research, we present an assessment and detailed profiles of 19 network SIs featured on the **Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators 2023**. The assessment is based on Everest Group’s annual RFI process for the calendar year 2023, interactions with leading network service providers, client reference checks, and an ongoing analysis of the network services market.

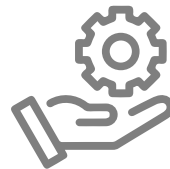
This report includes the profiles of the following 19 leading SIs featured on the network transformation and managed services PEAK Matrix – SIs:

- **Leaders:** Accenture, HCLTech, Infosys, Microland, TCS, and Wipro
- **Major Contenders:** Computacenter, DXC Technology, IBM, Kyndryl, Logicalis, Movate, Mphasis, Orange Business, Tech Mahindra, and Zensar
- **Aspirants:** Black Box, ConvergeOne, and GAVS Technologies

Scope of this report



Geography
Global



Providers
19 network SIs



Services
Network transformation
and managed services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 19 SIs featured on the Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023. The assessment is based on Everest Group’s annual RFI process for calendar year 2023, interactions with leading SIs, client reference checks, and an ongoing analysis of the network services market.

Some of the findings in this report, among others, are:

Everest Group PEAK Matrix® for Network Transformation and Managed Services

This report includes the profiles of the following 19 leading SIs featured on the network transformation and managed services PEAK Matrix – SIs:

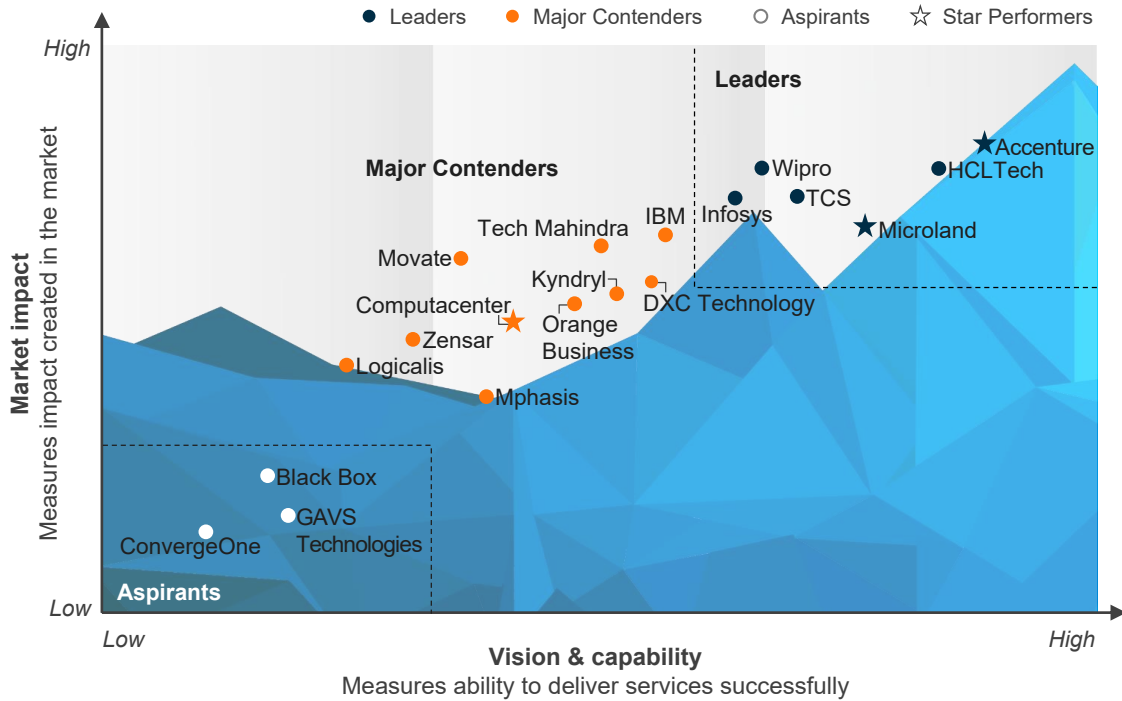
- **Leaders:** Accenture, HCLTech, Infosys, Microland, TCS, and Wipro
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System integrator characteristics

- Leaders have established expertise in providing end-to-end integrated network transformation engagements with a credible suite of IPs and solutions including industry-specific use cases and automation enabled offerings
- Major Contenders have developed substantial capabilities to offer comprehensive network services including advisory, transformation, and managed services, while their global reach and industry coverage are still in the process of expansion
- Aspirants are entering the market with increased emphasis on specific segments of network services rather than a focus on comprehensive portfolio, with limited investments in industry-specific offerings

This study offers 19 distinct chapters providing a deep dive into key aspects of network services market; below are three charts to illustrate the depth of the report

Network Transformation and Managed Services PEAK Matrix® Assessment – SIs 2023^{1,2}



1 Assessments for Black Box, ConvergeOne, GAVS Technologies, IBM, Kyndryl, Orange Business, Tech Mahindra, and Zensar excludes SI inputs and are based on Everest Group’s proprietary Transaction Intelligence (TI) database, SI public disclosures, and Everest Group’s interactions with insurance buyers
 2 Analysis for IBM and Kyndryl is based on capabilities after the split into IBM and Kyndryl
 Source: Everest Group (2023)

Capability assessment

Illustrative example

Measure of capability: Low High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 2	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 3	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 4	Low	Low	Low	Low	High	Low	Low	Low	Low
Provider 5	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 6	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 7	Low	Low	Low	Low	Low	Low	High	Low	Low
Provider 8	Low	Low	Low	Low	Low	Low	Low	Low	Low
Provider 9	Low	Low	Low	Low	Low	Low	Low	Low	Low

Everest Group’s remarks on providers

Illustrative example

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
Low	Low	High	Low	High	Low	High	Low	Low

Strengths

- Provider 1 is a suitable partner for enterprises seeking innovative commercial constructs due to its increased focus on as-a-service models such as output- and outcome-based pricing
- Clients have appreciated technical expertise, domain expertise, flexibility, and transparency in pricing presented by Provider 1 during network services engagements

Limitations

- Small enterprises should carefully evaluate Provider 1’s offerings as it focuses mainly on large deals and may not offer the best value proposition for minor transformation projects
- Global enterprises looking for verticalized offerings need to carefully evaluate Provider 1’s capabilities due to its limited investments in industry-specific solutions

Research calendar

Cloud and Infrastructure

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Network Transformation Services PEAK Matrix® Assessment – Communication Service Providers (CSPs) 2023	December 2022
Network Transformation Services Provider Compendium – Communication Service Providers (CSPs) 2023	January 2023
5G Engineering Services PEAK Matrix® Assessment 2023: The Next Frontier in the Hyperconnected Era	June 2023
Cloud Services Provider Compendium 2023 – North America	July 2023
Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023	August 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	Q3 2023
Cloud Services Provider Compendium 2023 – North America	Q3 2023
Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023	Q3 2023
Cloud Services Provider Compendium 2023 – Europe	Q3 2023
Top 10 SASE Tech Provider Report	Q3 2023
FinOps: A Critical element of enabling Cloud for Value (CfV)	Q2 2023
Cloud Security Services PEAK Matrix® Assessment 2023	Q4 2023
Cloud Security Services Compendium 2023	Q4 2023
Public Cloud (AWS, Azure, GCP) Services PEAK Matrix® Assessment 2023 – Specialist providers	Q4 2023
Public Cloud (AWS, Azure, GCP) Services Provider Compendium 2023 – Specialist providers	Q4 2023

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