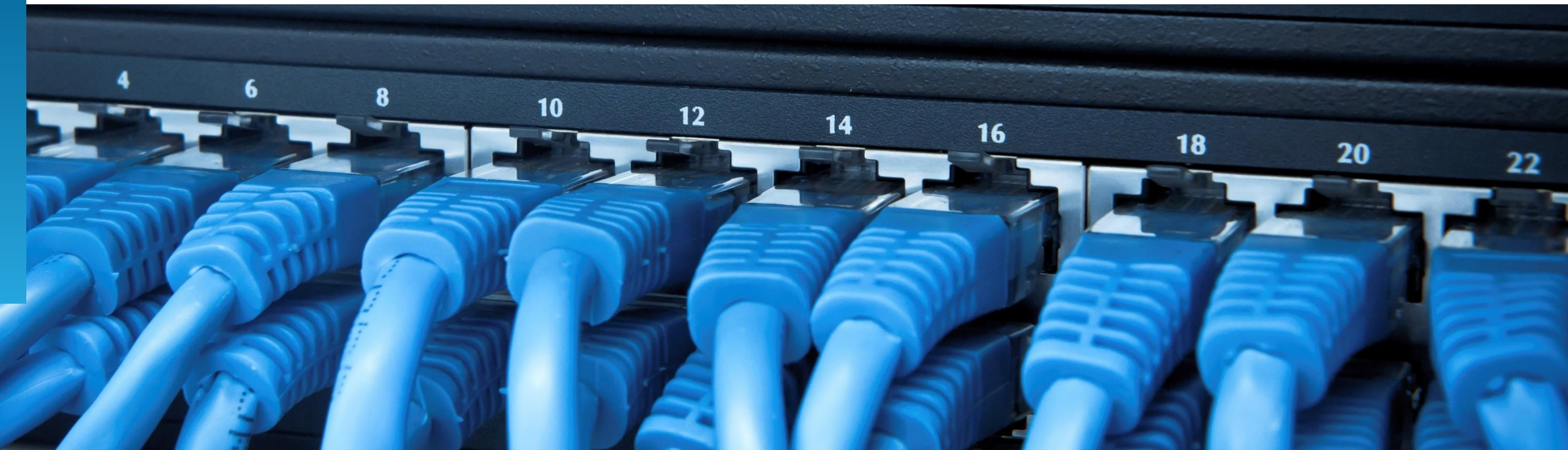


Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

November 2023: Complimentary Abstract / Table of Contents



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- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
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Introduction

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 \(SIs\) 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® Assessment – System Integrators (SIs) 2023:

- **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 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 (SIs) 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.

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

Everest Group Network Transformation and Managed Services PEAK Matrix® Assessment

- **This report includes the profiles of the following 19 leading SIs featured on the Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023:**
 - 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

Service provider 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, 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

The Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023 has 19 provider profiles

Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

Provider 1 | network transformation and managed services profile (page 1 of 6)

Overview

Vision:
 Provider 1's vision for network services is to be the... with reinvention, enabling cloud transformation, and operations, cloudification of networks, connectivity... Its strategy is built on three elements comprising the communications networks. Its broad set of services and managed services, helps enterprises to create and unleashes competitive advantage in multiple ir

Revenue from network services (2022)

<US\$200 million	US\$200-500 million
------------------	---------------------

Client: a global financial services company

Business challenge
 The client's existing global network infrastructure needs to drive its SDN transformation.

Solution

- Transformed the global network infrastructure to a six
- Transformed the overall architecture to be cloud-read
- Replaced End-of-life (EOL) data center infrastructure

Impact

- Reduced TCO
- Suppressed false alerts and increased incident avoid
- Automated more monthly service requests and stand

Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

Provider 1 | network transformation and managed services profile (page 2 of 6)

Case studies

Case study 1 SDN transformation and automation evolution, SD-WAN, and SD-D

Solutions/IP/Products (representative list)

Event name	Details
XYZ	XYZ is a complete network platform u... Cloud WAN, spoke networks, firewall
XYZ	XYZ helps to navigate the cloud land... and environmental sustainability. It is
XYZ	XYZ's Network Business Case modu...
XYZ	<ul style="list-style-type: none"> This is Provider 1's signature platf... The platform brings together Provi... automation (such as network deplo... XYZ is a liquid, modular platform th... and integration of multiple propri...
XYZ	The solution informs engineers about

Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

Provider 1 | network transformation and managed services profile (page 3 of 6)

Solutions/IP/products

Partnerships (representative list)

Partner name	Details
XYZ	XYZ and Provider 1 have collabora... investments modernize the joint so
XYZ	Provider 1 and XYZ launched a so...
XYZ	Provider 1 offers XYZ for applicati... edge solutions and third-party solu...
XYZ	The joint venture with XYZ focuses... areas.
XYZ	This partnership is used for a mult... (post-quantum), man-in-the-middle... modernization.
XYZ	This partnership helps to address... transformation journeys.
XYZ	Provider 1 integrates its network... orchestration (SMO) combined with
XYZ	The partnership includes deploying
XYZ	This partnership helps to accelerat...
XYZ	It has a partnership with XYZ to ex...
XYZ	This partnership helps to develop...
XYZ	Provider 1 has joint offering with X
XYZ	Having collaborated on more than

Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

Provider 1 | network transformation and managed services profile (page 4 of 6)

Partnerships

Investments (representative list)

Event name	Details
Acquisitions	<ul style="list-style-type: none"> Since its launch in Septe... In October 2021, Provid... technologies like cloud,
Investments	<ul style="list-style-type: none"> User experience manag... The Provider 1 XYZ plat... Co-developed secure cl... Provider 1 has built mult... agreements making it e...
Trainings and certification	<ul style="list-style-type: none"> It upskills and cross-skill... Organization-wide invest... Virtual instructor-led Clo...

Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023

Provider 1 | network transformation and managed services profile (page 5 of 6)

Investments and recent activities

Everest Group assessment – Leader

Measure of capability: Low High

Market adoption	Market impact			Vision and capability				Overall
	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	

Strengths

- Enterprises will benefit from Provider 1's detailed frameworks and methodologies for TCO reduction and YoY reduction in network spend, especially in current macroeconomic situations
- Those looking for consulting-led complex network transformation and managed services will find Provider 1 a fitting partner due to its strong cloud-native network capabilities and solution portfolio embedded with its offering
- Enterprises adopting multi- or hybrid-cloud network models will find Provider 1 a suitable fit as its cloud-native automation-driven platform facilitates a smooth transformation
- Provider 1 is appreciated by clients due to its collaborative approach and ability to introduce innovation in key areas to enhance efficiency

Limitations

- Enterprises that are price-conscious might not find Provider 1 to be the right fit as it is perceived as a premium-priced SI for network services
- Small and midsized enterprises looking for shared-service deals for network services need to carefully assess Provider 1's capabilities as it is inclined toward offering services through a dedicated network managed services model
- A few clients have highlighted that Provider 1 needs to improve commercial flexibility and strengthen its domain expertise in network services
- Certain clients feel that Provider 1 can improve its resource management strategy to enable faster availability of resources at critical times

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Research calendar

Cloud and Infrastructure Services

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Cloud Services State of the Market: Maximizing Value from Cloud – Europe	December 2022
Network Transformation Services PEAK Matrix® Assessment – Communication Services Providers (CSPs) 2023	December 2022
Network Transformation Services Provider Compendium – Communication Service Providers (CSPs) 2023	January 2023
Cloud Adoption in Banking: Imperative Role of Hyperscalers	July 2023
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	July 2023
Cloud Services PEAK Matrix® Assessment 2023 – North America	July 2023
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	July 2023
Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators 2023	August 2023
AWS Services State of the Market 2023: Enabling Enterprise Transformation with AWS	August 2023
Microsoft Azure Services State of the Market 2023: Catalyzing Enterprise Transformation with Azure Cloud Services	September 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	September 2023
Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023	November 2023
Network services State of the Market 2023: Exploring the wireless enterprise	Q4 2023
FinOps: a Critical Element of Enabling Cloud for Value (CfV)	Q4 2023
Mainframe Services PEAK Matrix® Assessment 2024	Q1 2024

Note: [Click](#) to see a list of all our published Cloud and Infrastructure Services reports



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