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Network Services State of the Market: Exploring the Wireless Enterprise

December 2023: Complimentary Abstract / Table of Contents

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Contents

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Background of the research

Enterprise objectives and outlook have rapidly evolved as their network transformation journey matures. There has been a shift toward next-generation network services such as software-defined networking, cloud networking, Wi-Fi 6/6E, and private 5G, which are expected to generate a substantial increase in demand from enterprises. Enterprises are no longer looking at network from cost optimization, technology/process efficiency, and digital enablement perspective but are considering network transformation to enable business value-creation.

However, the market is plagued by budgetary constraints, substantial operational costs, inadequate RoI realization, region-specific security and compliance concerns, layoffs, and shortage of skilled talent. Enterprises look up to various providers in the network services ecosystem to recalibrate strategy, drive transformation initiatives, and enable ecosystem orchestration to realize the expected level of value from network services.

In this report, we present an outlook on the current state of the market of global network services market trends and growth. The analysis is based on Everest Group's annual RFI process, interactions with leading network service providers, client reference checks, enterprise interactions, and ongoing analysis of the network services market. This report looks at:

- Network services adoption trends and market dynamics
- Industry-specific drivers and use cases
- Top next-generation technologies adopted by enterprises
- Exploring the concept of a wireless enterprise
- Key considerations for enterprise network teams

Scope of this report

Geography
Global

Industry
All industries

Services
Network services

Overview and abbreviated summary of key messages

This report examines the network services market encompassing growth outlook, key themes, as well as geographical and industry-specific insights. We have also deep dived into the exploration of wireless enterprise, including its architecture, benefits, and challenges for enterprises, as well as business use cases.

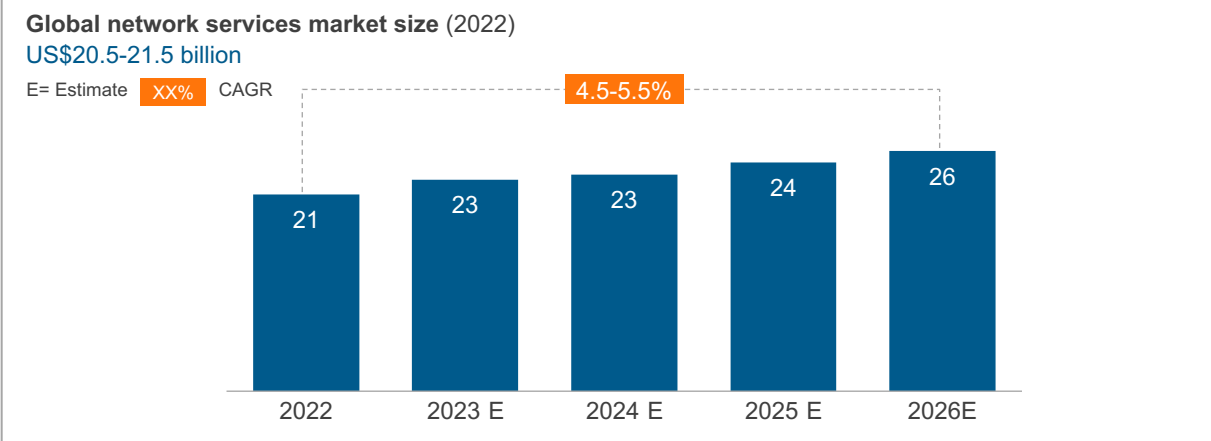**Some of the findings in this report, among others, are:**

Global network services market

- The global network services market is poised for substantial growth in demand over the next three years as network modernization demand is becoming more secular in nature
- Value realization and AI-led automation are driving growth, while legacy mindset and macroeconomic conditions are inhibiting demand acceleration
- Next-generation network services are demonstrating remarkable growth because of increased enterprise demand, investments, innovation, and a supply-side focus
- Manufacturing continues to be the biggest industry for network services, with BFSI and retail, distribution, and CPG reporting accelerated adoption

Wireless enterprise

- The demand to become a modern enterprise and enhance user experience have been driving the adoption of wireless enterprise architecture
- Wireless enterprise architecture designs and manages scalable wireless networks for business connectivity while maintaining security and network observability
- An optimal wireless enterprise should have characteristics spanning adaptability, security, diversity, sustainability, mobility, scalability, and centralized management
- A wireless enterprise is bound to benefit from its alignment to business, ability to innovate business models, flexibility in consumption patterns, and cost efficiency

This study offers two distinct chapters providing a deep dive into key aspects of network services market and wireless enterprise; below are four charts to illustrate the depth of the report

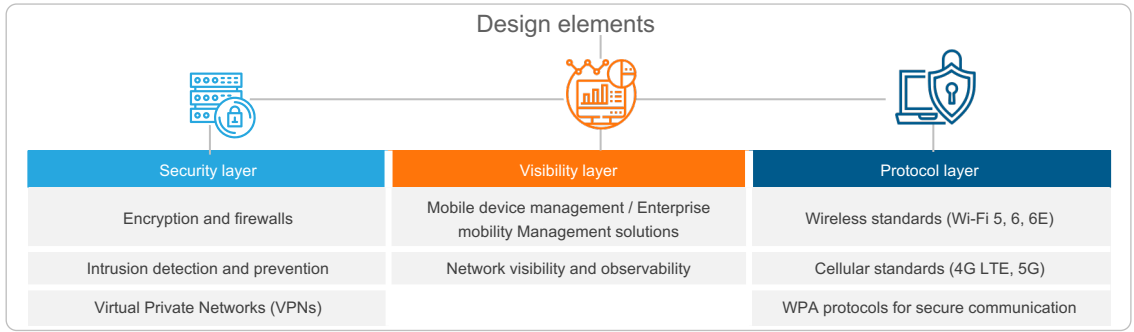## Global network services market and growth outlook

Global network services market size (2022)

US$20.5-21.5 billion

E= Estimate   `XX%`   CAGR

4.5-5.5%

21	23	23	24	26
2022	2023 E	2024 E	2025 E	2026E

Next-generation network services themes

SD-WAN and SASE

Wi-Fi 6/6E

IoT/Edge networking

Multi-cloud networking

Network automation

Private 5G

Wireless enterprise architecture

A wireless enterprise is an organization that deploys wireless networking infrastructure to enable secure, high-speed, and scalable connectivity for its devices. This technology allows employees to access data, applications, and services without relying on physical connections, and increases mobility, flexibility, and efficient communication.

Design elements

Security layer	Visibility layer	Protocol layer
Encryption and firewalls	Mobile device management / Enterprise mobility Management solutions	Wireless standards (Wi-Fi 5, 6, 6E)
Intrusion detection and prevention	Network visibility and observability	Cellular standards (4G LTE, 5G)
Virtual Private Networks (VPNs)		WPA protocols for secure communication

Relevant business use-cases for wireless networks

Smart factories
Improved time-to-market, product quality, inventory control, and Customer Experience (CX) by harnessing real-time information

Connected fleet
Elevated CX with real-time awareness, in-car infotainment, HD maps, and smooth over-the-air software updates

Modern retail store
Enhanced CX by offering contactless checkouts, AR for product details, and customized pricing and promotions in the store

eHealth
Improved patient outcomes through HD video consultations, robotics, automation, and smart wearable devices

Research calendar
Cloud and Infrastructure

Reports title	Release date
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
Cloud Services Provider Compendium 2023 – North America	October 2023
Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023	November 2023
Network Services State of the Market: Exploring the Wireless Enterprise	**December 2023**
SASE Spotlight: Unveiling the Top 10 SASE technology providers	Q4 2023
FinOps for Enabling Value in Cloud: Unveiling the Top 10 Multi-Cloud FinOps visibility tool providers	Q4 2023

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