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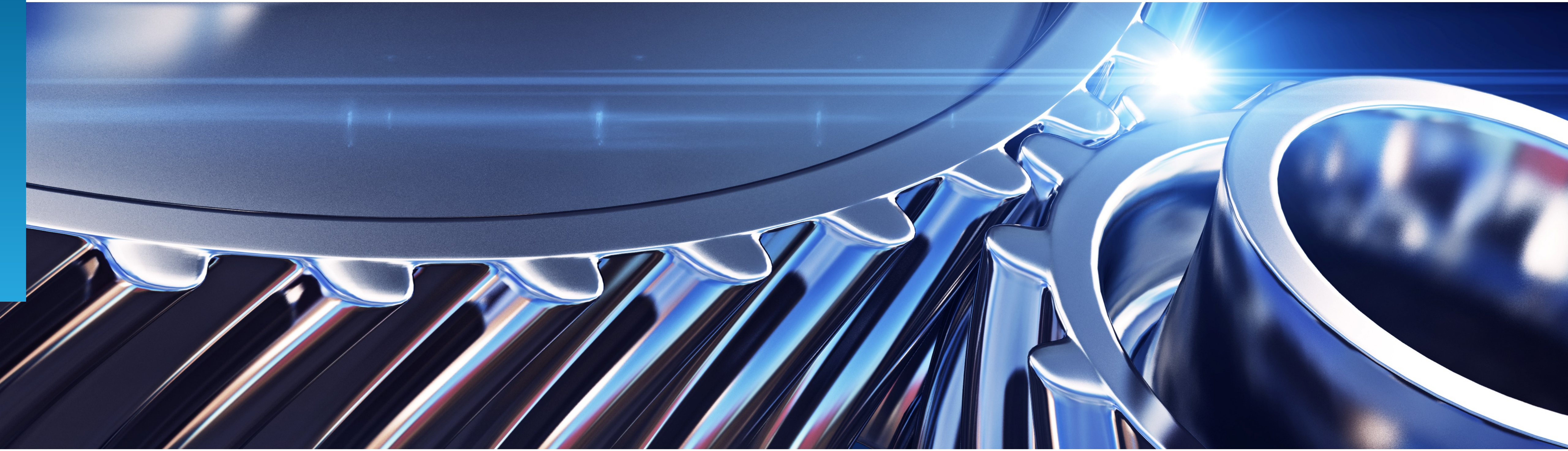
Everest Group PEAK MATRIX® Engineering Services

5G Engineering Services PEAK Matrix® Assessment 2023: The Next Frontier in the Hyperconnected Era

June 2023: Complimentary Abstract / Table of Contents



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Introduction

5G's lower latency and higher bandwidth has unlocked newer use cases for enterprises to explore. Additionally, adoption of 5G is allowing transformation of network infrastructure to make them quickly scalable, leading to higher levels of customization and lower operating costs. Enterprises are primarily exploring the below areas within 5G engineering:

- Decoupling of hardware and software in the form of network function virtualization and automation of network operations to lower the costs of network hardware, accelerate network deployment, and enhance efficiency in establishing networks
- Adoption of open-source components (hardware and software) and benchmarking their performance and operational challenges against proprietary solutions
- Feasibility of 5G-enabled use cases to boost monetization opportunities
- 5G-enabled private networks and edge computing solutions to improve industrial processes through connected IoT devices, improved data security protocols, reduced operational expenses, and faster decision-making

However, the nascent nature of the market is leading to uncertainty and increased complexity for enterprises. As a result, they are looking to partner with service providers to share development risks, lower operational costs, implement system integration measures, bring in a larger talent pool, and leverage the diverse expertise of their partner ecosystem to engineer solutions faster. To address these expectations, service providers are investing in enhancing their 5G engineering capabilities through skillset development programs, CoEs, labs to carry out R&D and showcase their solutions, partnerships with ecosystem players, and strategic investments to gain competencies and expand across geographies.

This research, the second edition of Everest Group's 5G Engineering PEAK Matrix® Assessment, evaluates 20 engineering service providers, features them on the PEAK Matrix®, and shares insights on enterprise sourcing considerations. The study is based on RFI responses from service providers, interactions with their 5G engineering leadership, client reference checks, and ongoing analysis of the engineering services market.

This report includes the profiles of the following 20 leading engineering service providers featured on the 5G Engineering Services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCLTech, Infosys, NTT DATA, TCS, and Tech Mahindra
- **Major Contenders:** Brillio, Cyient, DXC Luxoft, HARMAN DTS, IBM, LTTS, Tata Elxsi, Tietoevry, VVDN Technologies, and Wipro
- **Aspirants:** BICS, GS Lab I GAVS, and Sasken

Scope of this report

Geography
Global

Providers
20 leading broad-based and pureplay service providers

Services
5G engineering services

Overview and abbreviated summary of key messages

This report examines the global 5G engineering services landscape and assesses 20 service providers. It focuses on service providers' capabilities and market impact in helping enterprises enable 5G integration through equipment engineering, network engineering, and solution engineering services. It also draws insights on the trends being followed by service providers in 5G engineering services.

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

Service provider position and delivery capability

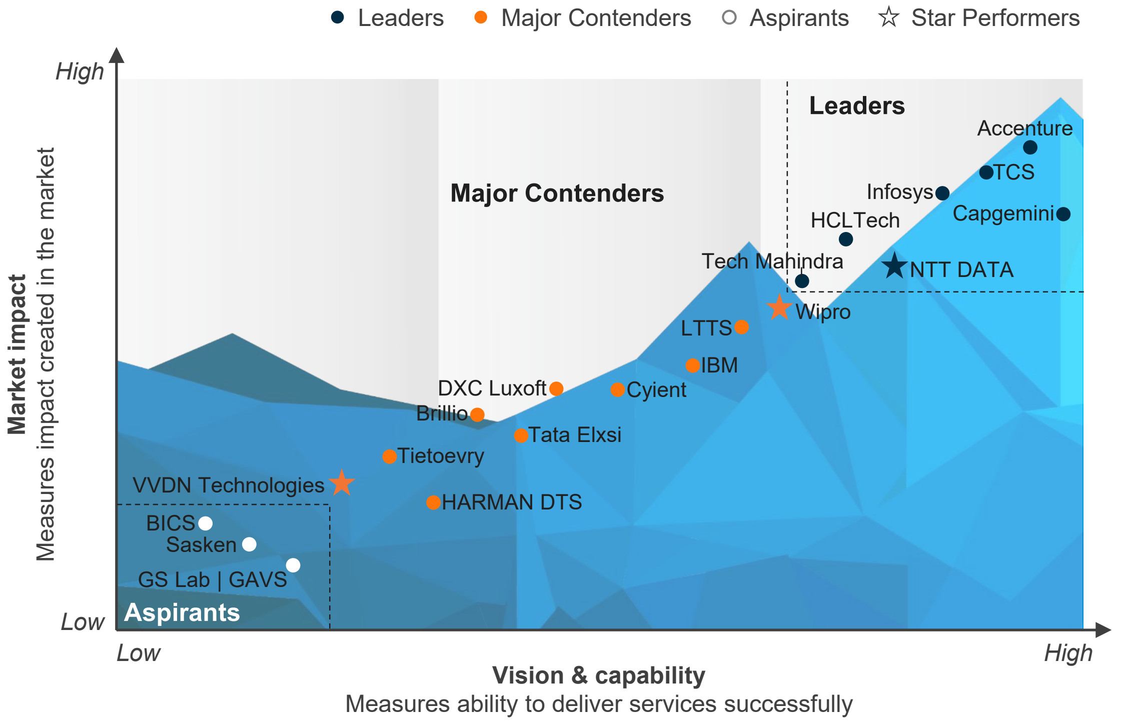
- Service providers can be categorized into leaders, major contenders, and aspirants on a capability-market-share matrix for 5G engineering services
- Accenture, Capgemini, HCLTech, Infosys, NTT DATA, TCS, and Tech Mahindra are the current leaders in the global 5G engineering services market. However, several service providers are emerging as major contenders
- NTT DATA, VVDN Technologies and Wipro have emerged as the Star Performers owing to the compelling growth momentum showcased by them – both in terms of revenue and differentiated capabilities

Service provider characteristics

- The Leaders segment includes broad-based global players, which have existing capabilities to build on as well as wide client bases giving them an edge in winning client engagements. They are also investing significantly in enhancing their 5G engineering capabilities in the form of talent upskilling, labs and CoEs, building extensive partner ecosystem that would help accelerate the pace of 5G deployment and streamline operations, and explore current themes in 5G engineering such as virtualization and adoption of open-source components
- The Major Contenders segment comprises both broad-based global players and pureplay firms that have a noteworthy presence in 5G engineering services and showcase expertise in specific areas within 5G. Their distribution of revenue and client portfolio is generally inclined toward specific subsegments, ecosystem entities, or verticals with lower presence across others. Most Major Contenders are small to midsized firms with a fast-growing 5G engineering services business
- Aspirants consist of players whose 5G engineering services business is in nascent stages. They have capabilities in specific stages of the value chain and limited diversity in their client portfolio. They have a smaller employee base and limited geographical presence that hinders their chances at scaling their business rapidly. They have made limited investments in enhancing their 5G engineering capabilities and they are more focused on scaling the current offerings than having a diversified portfolio

This study offers three distinct chapters providing a deep dive into key aspects of the 5G engineering services market; below are three charts to illustrate the depth of the report

Everest Group 5G Engineering Services PEAK Matrix® Assessment 2023[1,2]

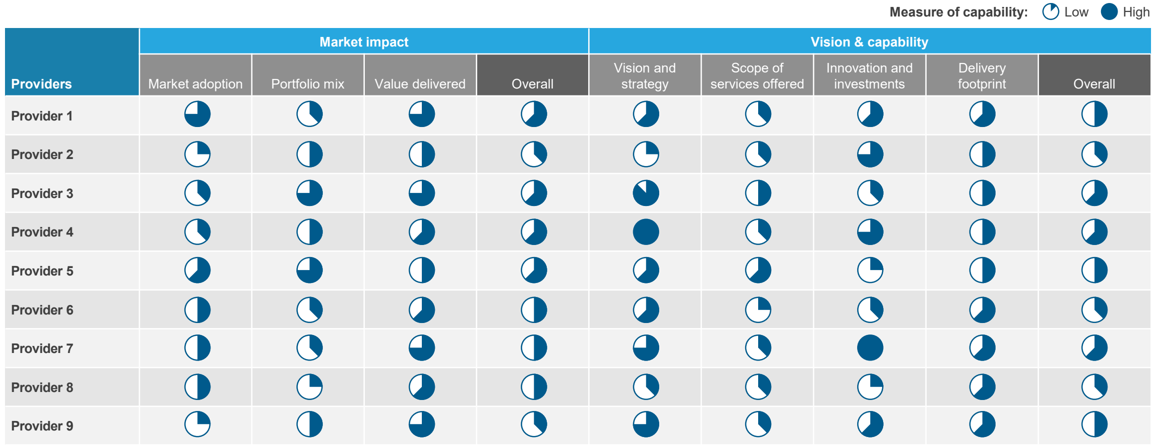


1 Assessments for Sasken and Tietoevry exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interaction with buyers
2 Assessment of NTT DATA reflects the combined capabilities of NTT DATA and the global IT services of NTT; and GS Lab I GAVS covers the capabilities of the combined entity formed by merging GS Lab and GAVS

Source: Everest Group (2022)

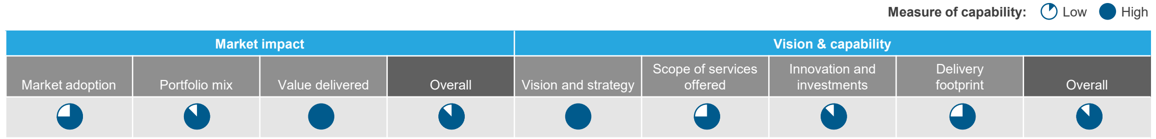
Capability assessment

Illustrative example



Everest Group's remarks on providers

Illustrative example



Strengths

- Has a balanced portfolio of clients, spread across small, midsize, and large enterprises in terms of revenue
- Has an established vision for its 5G capabilities that is bolstered by focused investments in partnerships with technology firms, IP, and solution accelerators

Limitations

- Focused on the North America and European markets and is yet to explore emerging markets such as APAC
- Needs to invest in academic partnerships and 5G labs to develop capabilities in research and development

Research calendar
Engineering Services

Published | Planned | Current release

Reports title	Release date
Acing the Art of Platform-driven Growth: Software Product Engineering Services PEAK Matrix® Assessment 2023	December 2022
Software Product Engineering Services – Provider Compendium 2023	February 2023
Unleashing the Era of Phygital Manufacturing – Industry 4.0 State of the Market 2023	February 2023
Engineering R&D (ER&D) Outlook for 2023	February 2023
Engineering Services CXO Insights: Key Issues Report 2023	April 2023
5G Engineering Services PEAK Matrix® Assessment 2023: The Next Frontier in the Hyperconnected Era	**June 2023**
Unlocking the Growth Frontier through Software Product Innovation	Q2 2023
Undertaking the Digital Platform Adoption Journey	Q2 2023
Software Product Engineering Services State of the Market 2023	Q2 2023
5G Engineering Services – Provider Compendium 2023	Q2 2023
Engineering Services Top 50 2023	Q3 2023
ACES Mobility Automotive Engineering Services PEAK Matrix® Assessment 2023	Q3 2023
ACES Mobility Engineering Services – Provider Compendium 2023	Q3 2023
Trends in the Top 200 Engineering Research & Development (ER&D) Enterprises 2023	Q3 2023
Digital Twin Services PEAK Matrix® Assessment 2023	Q3 2023

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