



Everest Group PEAK Matrix[®] for Network Transformation and Managed Services Providers 2021

Focus on Wipro
August 2021



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

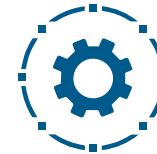
Scope of this report:



Geography
Global



Service providers
12



Services
Network transformation
and managed services

Network transformation and managed services PEAK Matrix® characteristics

Leaders:

Accenture, HCL Technologies, TCS, and Wipro

- Leaders in network services have established successful businesses in delivering global network services, driven by capability building and experience across the end-to-end network services spectrum (consult, build/design, and manage) across industry verticals
- These players continue to proactively drive investments in next-generation technology themes and services capability development (internal IP/tools, partnerships, acquisitions, etc.)
- Leaders have a strong focus on driving alignment between the business and IT teams of enterprises to drive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale/complex network transformation, specifically for the large enterprise segment (with annual revenue greater than US\$5 billion)

Major Contenders:

IBM, Infosys, Microland, Orange Business Services, Tech Mahindra, and Zensar

- Major Contenders in the network services space include a mix of large and mid-sized service integrators
- These players have built meaningful capabilities to deliver network services (both management/run and transformation services); however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across industry verticals or geographies or both) – this is also reflected in the scale of market success achieved by these players (vis-a-vis Leaders)
- However, all these players are making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their “capability gaps”, and are thereby, positioning themselves as strong challengers to the Leaders in this space

Aspirants:

Computacenter and Mphasis

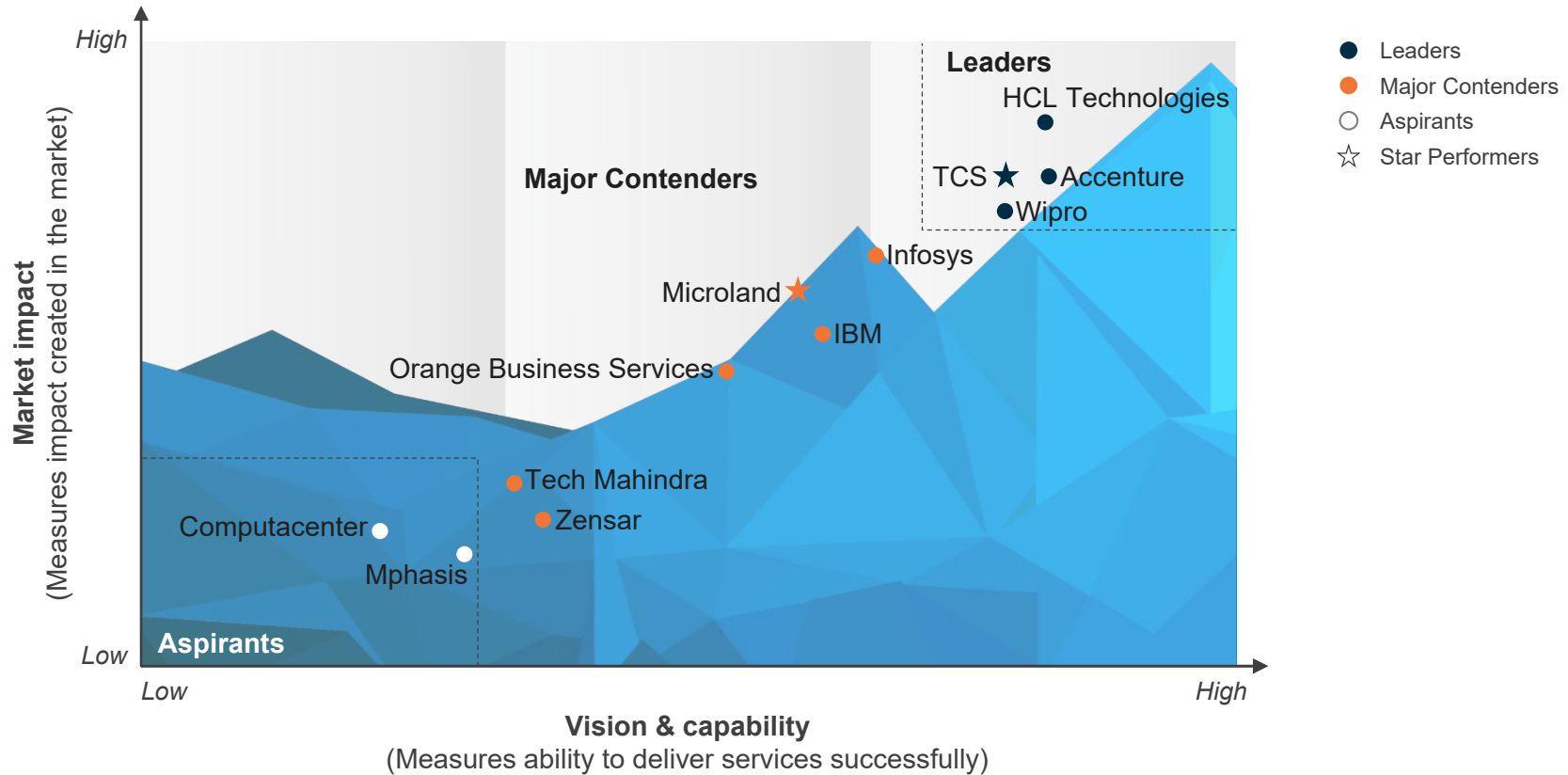
- The network services business of Aspirants is in the initial stages of growth and is currently not a leading revenue generator for these players
- Nevertheless, these companies are making investments to build broader capabilities to cater to buyers (through service and technology partnerships as well as internal IP/tools)

Everest Group PEAK Matrix®

Network Transformation and Managed Services PEAK Matrix® Assessment 2021 |

Wipro positioned as Leader

Everest Group Network Transformation and Managed Services PEAK Matrix® Assessment 2021¹












¹ Assessments for Computacenter, IBM, and Tech Mahindra exclude service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interaction with buyers

Source: Everest Group (2021)

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Everest Group assessment – Leader

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
								

Strengths

- Wipro is an ideal fit for enterprises seeking complex, multi-geographic network transformation with hyper-automation capabilities
- It has built strong network automation capabilities by leveraging its AI-platform HOLMES to build NetOps 2.0 and credible capabilities in next-generation technologies such as SDN, IBN, network automation, and edge
- It has introduced outcome-based pricing model in network services engagements to increase pricing transparency
- Solutioning flexibility, stable operations, and support during COVID-19 pandemic without any disruptions were some of the strength areas highlighted by clients

Limitations

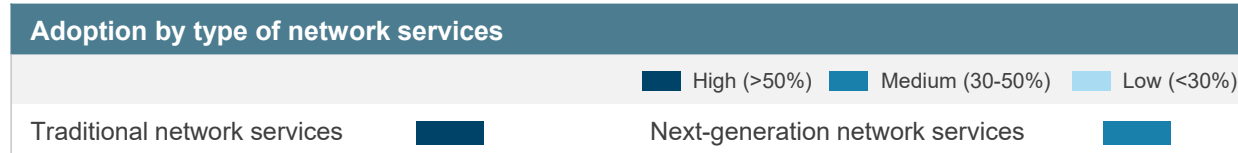
- It is not a good fit for small and medium-sized enterprises looking for low-cost solutions
- It relies on third-party contractors for local hands & feet and maintenance and may lack regional presence in certain geographies. Enterprises are advised to validate availability of resources during the RFP stage
- Some clients believe it needs to conduct deeper analysis of the existing infrastructure and client requirements, and push for innovation in its engagements
- Talent management and required skill development are some of the gap areas highlighted by clients

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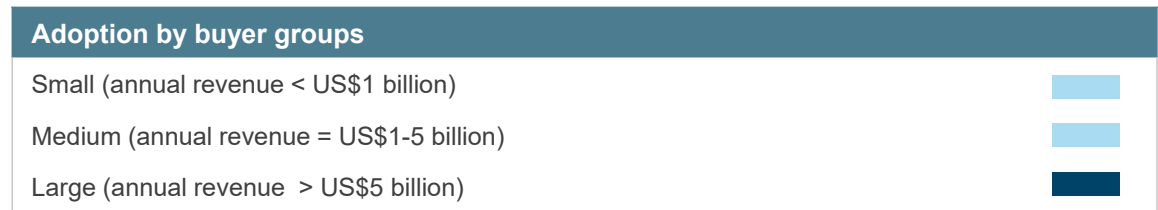
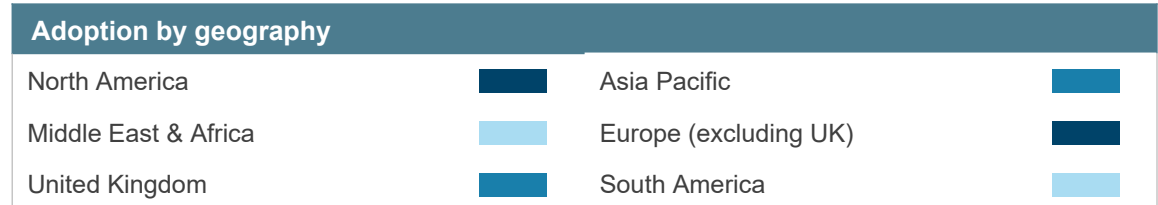
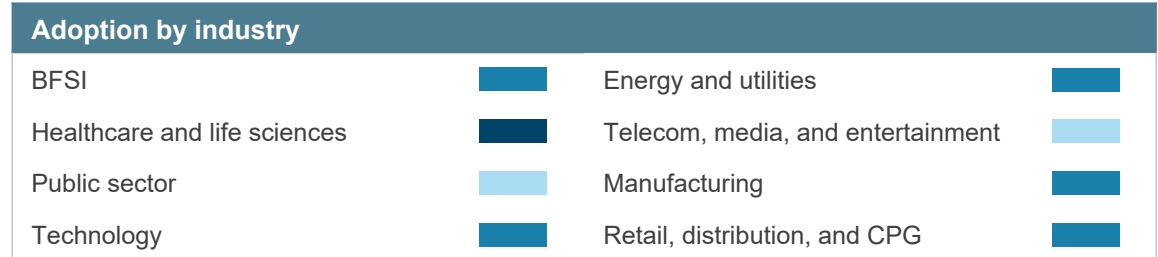
Overview

Wipro's vision for network services is to help customers accelerate their digital journey by providing network services that are led by consulting and driven by transformation. It wants the network managed services to be "manual by exception", i.e., minimal human touch points in the network operations.

Network services revenue



Low (<10%) Medium (10-20%) High (>10%)



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Case studies

Case study 1

Enabling global network and datacenter infrastructure outsourcing

Client

A global manufacturing company

Business challenge

Global outsourcing of datacenter and network infrastructure for more than 400 branch offices and manufacturing plants to support the end-of-life hardware and software infrastructure.

Solution

- Hosted datacenter services and disaster recovery facility in the US
- Enabled a SPOC for managing DC interconnects and WAN

Impact

- Reduced operational complexity
- Improved infrastructure resiliency
- Enhanced business agility

Case study 2

Delivering network rollout in a factory model

Client

A global financial services company

Business challenge

Automation of the reconciliation task for every change since reconciliation was required for a large volume of changes every month

Solution

- Enabled reconciliation of over 20,000 changes per month across global locations of the client
- Transformed the cost model from fixed price, based on ticket volume, to unit price, which resulted in cost savings and more ownership from Wipro's side

Impact

- Time and effort reduced due to automation of scripts
- Flexibility and transparency enhanced by unit price based pricing model
- Faster cycle times and enhanced efficiency

Wipro | network transformation and managed services (page 4 of 5)

Solutions

Proprietary solutions (representative list)	
Solution	Details of the tool/solution
Insightix Network	Provides informed assessments, benchmarks, and roadmaps that help drive the right consulting engagement to meet digital transformation goals of enterprises
NetFactory	Enables faster network rollout with an assembly line approach that provides higher predictability, better resource utilization, and improved quality
NetOps 2.0	An automated network operations solution that brings automation across the spectrum of network services. It leverages Wipro's AI platform "Wipro Holmes™" to drive efficiency in network IT operations and to improve business effectiveness
#WANFreedom	A vendor neutral solution that offers flexibility to choose the best type of connectivity, telcos, and SD-WAN technology. It also provides comprehensive life cycle services that cover consulting, planning & design, product procurement, implementation, and managed WAN services
Multi Domain Orchestrator (MDO)	An organization level network intent management platform designed to orchestrate and manage the enterprise access network, WAN, datacenter, and cloud. Its primary function is to automate enterprise-wide end-to-end IBN, policy & service provisioning, and cross domain service assurance along with end-to-end network visibility
Cognitive Digital Networking Infrastructure (CoDNI)	A unified purpose-built platform powered by Wipro Holmes™ for Cisco DNA that acts as an orchestrator. It connects multiple networking elements with standard APIs, and enables dynamic network operations & ITSM by establishing a connection with Wipro's ITSM layer, i.e., ServiceNXT™
Rapid SDN Toolkit	Helps in rapid and error free SDN deployments by eliminating the requirement for highly skilled resources

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Partnerships, investments, and recent activities

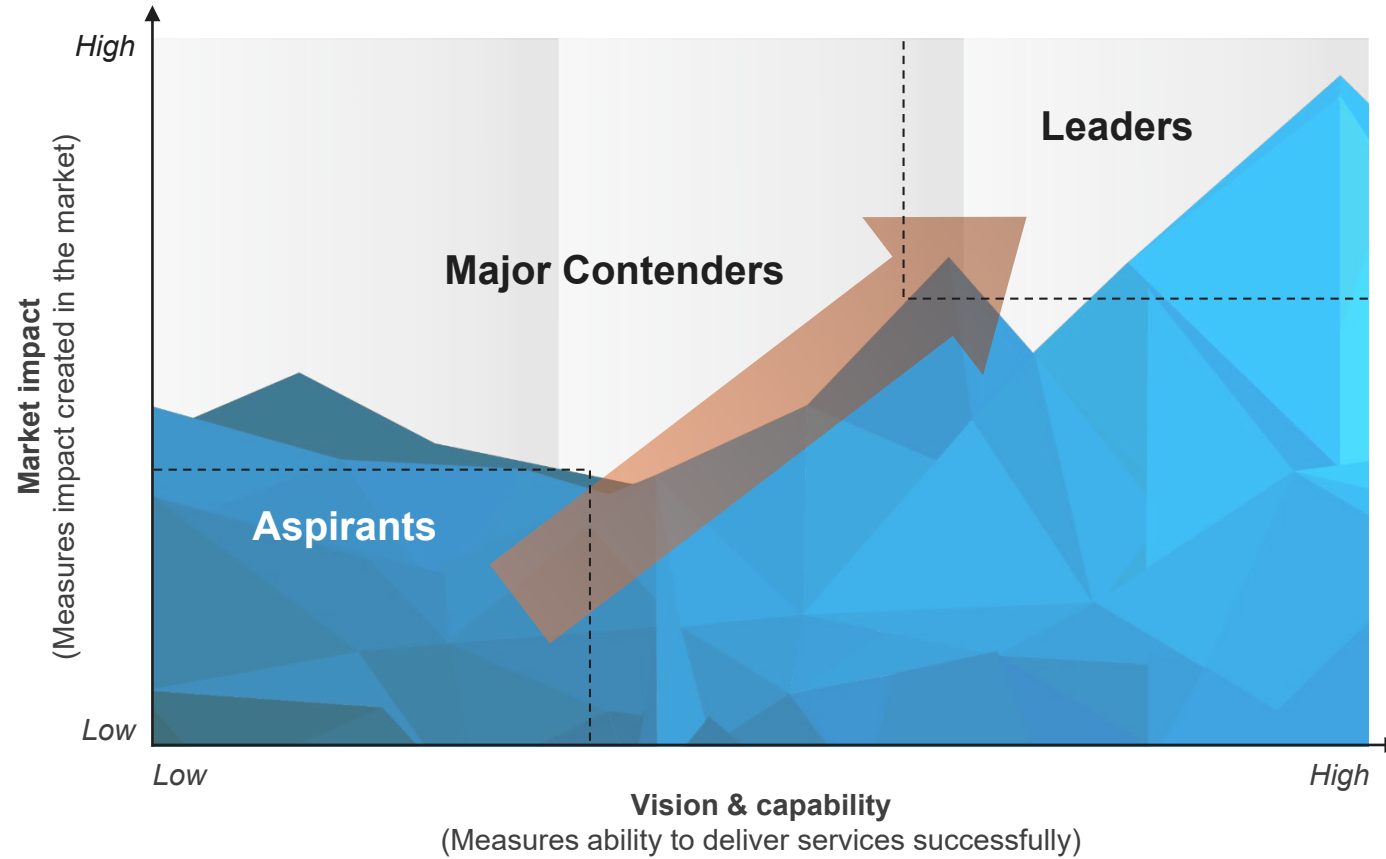
Partnerships (representative list)		
Partner name	Type of partnership	Details of the partnership
Cisco	Technology	Wipro is a 360-degree partner and global service provider for Cisco. It leverages Cisco's technology products, solutions, platforms, and services with focus on network transformation, datacenter & cloud solutions, IoT, security, application modernization, 5G, and unified communications & collaboration. It recently formed Cisco Business Unit (CBU) and is engineering & development partner of Cisco. It also provides managed services for security, SD-WAN, and other technologies.
HPE	Technology	Wipro's combined experience with HPE in converged infrastructure, virtualization, hybrid cloud, and other emerging technologies provides customers with an integrated, scalable, and automated IT platform. As a strategic partner, Wipro focuses on building joint adjacent technologies and offer as-a-service offerings to its end customers, e.g., NaaS and ESP.
VMware	Technology	Wipro is a global System Integrator and System Outsourcer (SISO) of VMware. It leverages this partnership to deliver datacenter, hybrid cloud, mobility, network, and security solutions to its enterprise customers to accelerate IT transformation.
Palo Alto	Technology	Wipro is a global system integrator and strategic partner of Palo Alto. It leverages this partnership to provide secure SD-WAN and managed SASE along with other next-generation technologies across network and security.

Investments and recent activities (representative list)	
Theme	Details of the investment
MoogSoft	Invested in MoogSoft to leverage de-facto solutions for application of AI to IT operations (AIOps) that translates to productivity gains for customers in incident management. The MoogSoft AIOps platform has helped enterprises avoid outages, automate service assurance, and accelerate digital transformation initiatives.
Next-generation technologies	Worked with niche partners in the area of AI/ML to cater to the growing demands of automation in networks and adding capability into the existing solutions with new AI/ML capabilities. It has also continued to look for strategic investments in network and security start-ups through Wipro ventures.
Skill development programs	Invested in specific programs like Catapult (upgrading the skillset of technology resources to next level in fast-track mode) and Infra Ninja (creating automation and new age NetOps skills and AI/ML based programmability engineers). It has focused on continuous skill development around network programming, automation, and programme management skills to deliver superior experience to its customers around the globe.

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

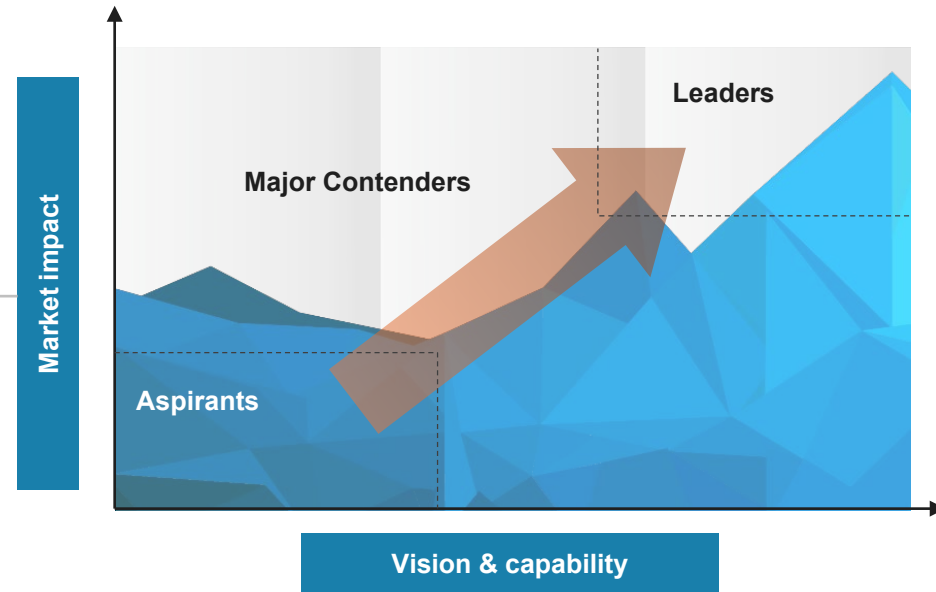
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YOY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



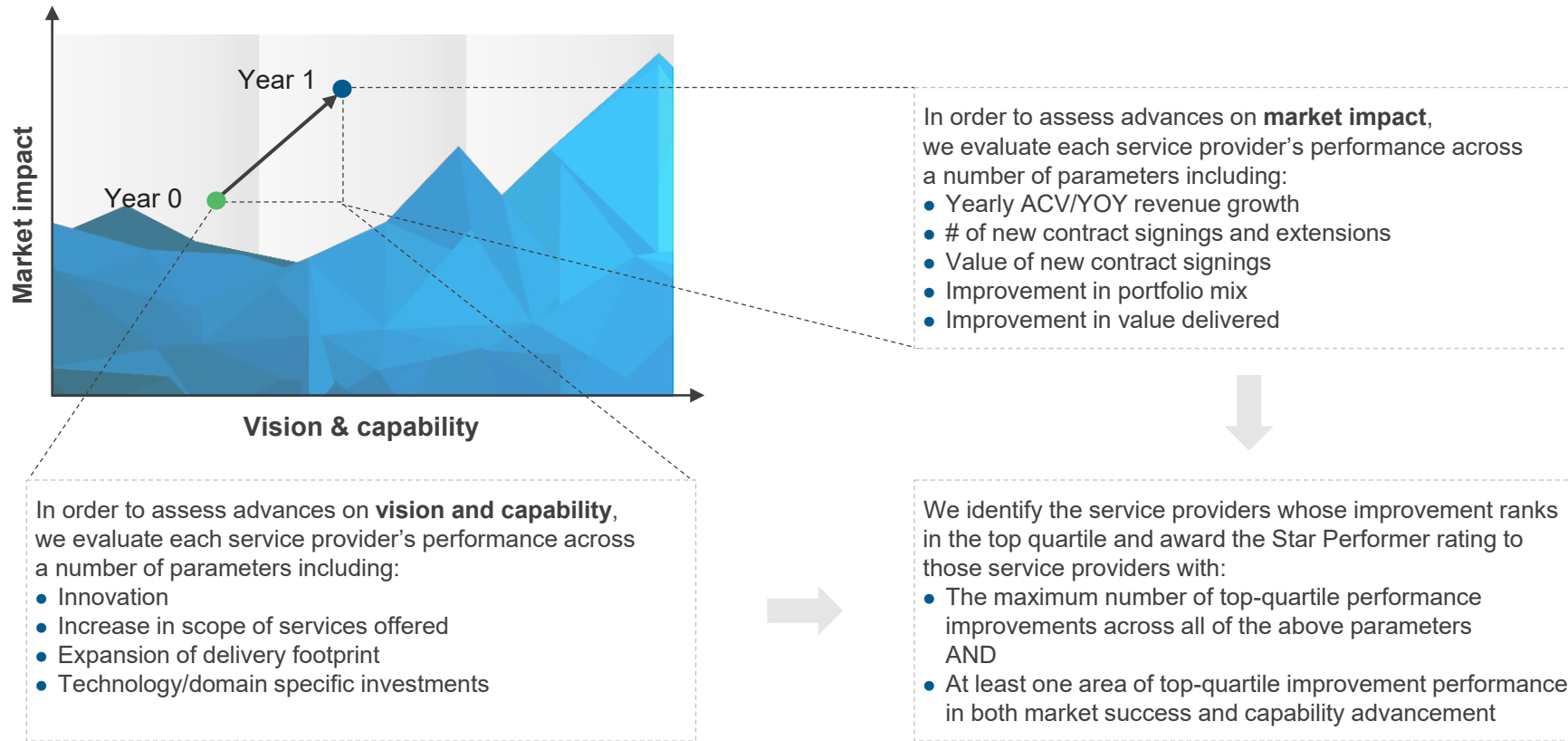
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix



The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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