



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

Focus on Wipro
August 2023



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 \(SIs\) 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.

The full 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

Characteristics of Leaders, Major Contenders, and Aspirants

Leaders

Accenture, HCLTech, Infosys, Microland, TCS, and Wipro

- 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
- They continue to make strategic investments to expand and strengthen their partner ecosystem by engaging with prominent technology providers, niche providers, and start-ups for co-innovation and joint Go-To-Market (GTM) initiatives
- These providers are at the forefront of the digital transformation narrative underpinned by network transformation driving large-scale and complex transformations on a global scale. They are able to justify RoI and reduction in Total Cost of Ownership (TCO) from previous investments through current managed services construct

Major Contenders

Computacenter, DXC Technology, IBM, Kyndryl, Logicalis, Movate, Mphasis, Orange Business, Tech Mahindra, and Zensar

- While 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
- They have made specific investments to enhance their delivery capabilities, talent strategy, and partnership ecosystem, while concurrently focusing on developing tailored offerings and Intellectual Properties (IPs) dedicated to network services
- While making targeted investments and developing a portfolio to offer network managed services, these providers are progressively enhancing their focus on building capabilities for driving end-to-end network transformation

Aspirants

Black Box, ConvergeOne, and GAVS Technologies

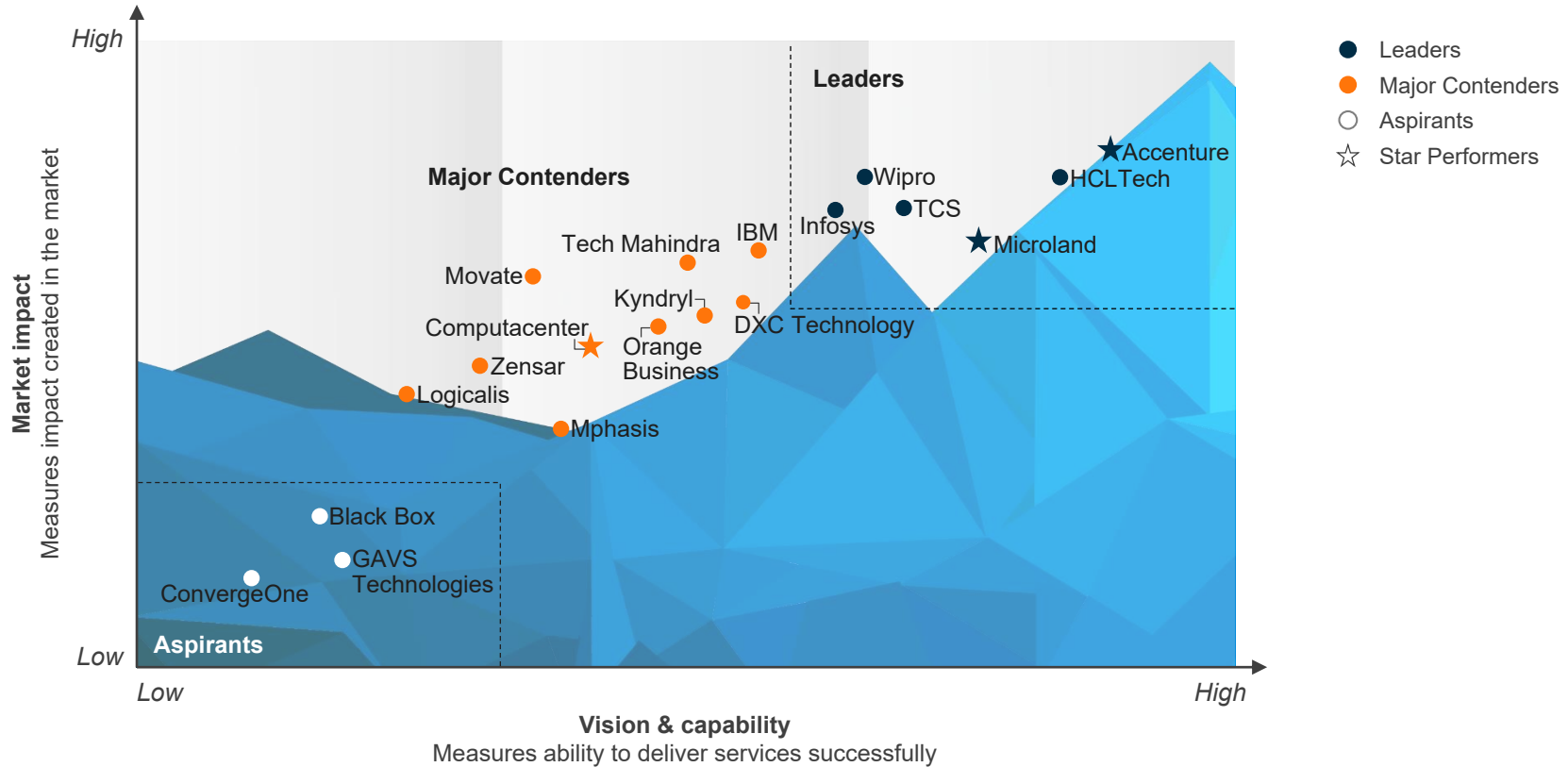
- Aspirants are entering the market with increased emphasis on specific segments of network services rather than a focus on comprehensive portfolio, with limited investments in industry-specific offerings
- While these providers are focusing on smaller deals in specific geographies, they are also gradually investing in developing assets including accelerators, tools, and IPs, along with partnerships



Everest Group PEAK Matrix®

Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023 | Wipro is positioned as a Leader

Everest Group Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (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)

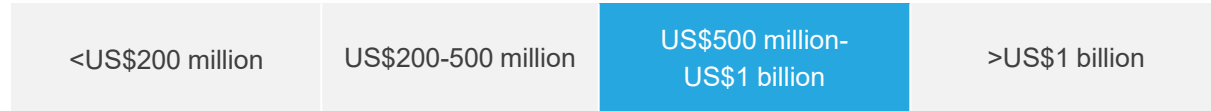
Wipro profile (page 1 of 6)

Overview

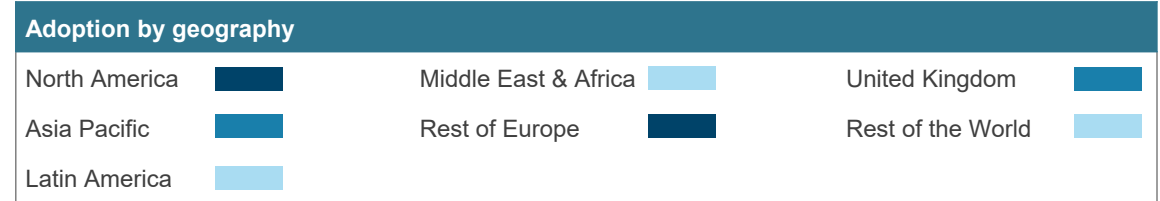
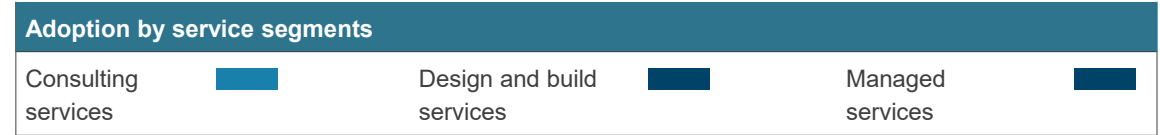
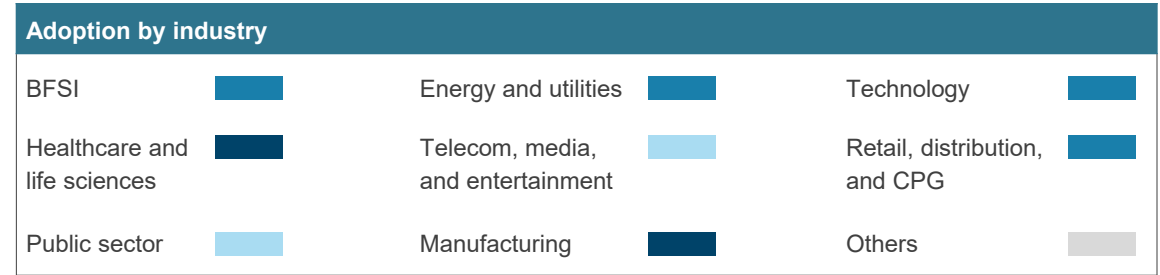
Vision:

Wipro envisions delivering business outcomes for enterprises by enabling faster and better access to services through new ways of operations. It aims to provide a seamless experience for both users and applications through efficiency, effectiveness, and TCO reduction. Wipro is making significant investments to deliver self-driven networks that form, correct, and provide connectivity services on demand and at scale. Wipro is making a paradigm shift with automation, transformation, and a cloud-first approach as the key pillars while focusing on managed SD-WAN, Wi-Fi 6, edge services, SASE, and private 5G.

Revenue from network services (2022)



■ Not available
 ■ Low (<10%)
 ■ Medium (10-20%)
 ■ High (>20%)



Wipro profile (page 2 of 6)

Case studies

Case study 1

Network transformation with vendor consolidation

Client: a leading worldwide manufacturer of optical products

Business challenge

The client wanted to transform its WAN network comprising around 100 vendors distributed globally. The network was complex, difficult to operate, and spread across 40 countries and five regions. The client wanted to improve its network performance, reduce higher bandwidth costs, and consolidate the multiple vendors.

Solution

- Leveraged Insightix for a consulting-led approach for network assessment and transformation
- Deployed a single window for contract management by consolidating more than 100 service providers to three providers for the WAN network
- Proposed the WAN transformation with Wipro's #WANFreedom carrier-agnostic SD-WAN solution for all regions

Impact

- Reduced OPEX for WAN by bringing in simplicity and agility to the network
- Enabled cost control and reduced the cost on bandwidth and WAN operations
- Reduced cost by 30% with vendor consolidation
- Reduced expected WAN operations cost by around 20%
- Provisioned better bandwidth utilization for all applications

Case study 2

Provision of SD-WAN as a service

Client: a multinational conglomerate focused on industrial engineering and steel production

Business challenge

The client's network was experiencing increased traffic to the internet and the public cloud. It had a complex WAN architecture with more than 100 virtual routers, with underutilization of the backup circuits, and limited visibility and control of application traffic. There was a slow response from the existing service provider due to too many processes, lead time delays, and interlocking issues.

Solution

- Implemented application-aware routing through application-wise load balancing on WAN
- Deployed the Prisma SD-WAN solution on client sites with integration to Zscaler services
- Reduced MPLS usage and increased internet and IP VPN usage starting with 10 pilot environments and later implementing it in over 400 sites

Impact

- Reduced WAN costs by 40% by combining broadband with business internet, thereby optimizing bandwidth utilization
- Achieved a significant boost in staff productivity by employing zero-touch deployments
- Facilitated a 40% increase in bandwidth availability without any additional WAN costs
- Enabled better reporting and cost management for business units by identifying application-wise bandwidth consumption patterns

Wipro profile (page 3 of 6)

Solutions/IP/Products

Solutions/IP/Products (representative list)

Event name	Details
Insightix Network	<ul style="list-style-type: none"> • Provides informed assessments, benchmarks, and roadmaps that help to drive the right consulting engagement to meet the digital transformation goals of enterprises • Uses a network maturity model framework to measure maturity across 10 dimensions to assess the network readiness for the present, near future, and future growth of the business • Offers a granular review of the network infrastructure across over 30 attribute groups and over 100 attributes
NetFactory Model	Enables faster network rollout with the factory assembly line, approach with higher predictability, better resource utilization, and improved quality while maintaining consistency
NetOps 2.0	Automated network operations used in tandem with internal AI platform – Wipro Holmes – to drive efficiency in network IT operations
#WANFreedom	A vendor-neutral solution, offering flexibility to choose the best type of connectivity, telcos, and SD-WAN technology with comprehensive life cycle services covering consulting planning and design, product procurement, implementation, and managed WAN services. Also secures internet break-out from branches
Rapid SDN Toolkit	A tool that helps rapid and error-free SDN deployments by eliminating the requirement of niche skilled resources through programmability
SwiftSDN	Leverages various architectural approaches that are suitable for business needs and operational use cases. The use case-led approach coupled with reference architectures and Wipro's network life cycle management frameworks delivers flexible and adaptable datacenter LAN infrastructure
Multi-Domain Orchestrator (MDO)	<p>An organization-level network intent management platform designed to orchestrate and manage the enterprise access the network, WAN, data center, and cloud. MDO's primary functions are:</p> <ul style="list-style-type: none"> • Automation of enterprise-wide, end-to-end, and intent-based networking • Policy and service provisioning • Cross-domain service assurance • Providing end-to-end visibility
Cognitive Digital Networking Infrastructure (CoDNI)	A unified purpose-built platform powered by Wipro Homles™ for Cisco DNA™, which acts as an orchestrator, connecting multiple networking elements with standard APIs and enables dynamic network operations and IT service management by connecting to Wipro's ITSM layer ServiceNXT™
Wipro's RE.TALE	Helps retail customers with the digital transformation of their stores, data centers, and office locations. Works under the tenets of intelligent stores, supply chain, experience, and foundation
Home is the New Branch	An extension to #WANFreedom, ensuring seamless secured access for the employees working remotely on cloud-hosted and on-premises applications.

Wipro profile (page 4 of 6)

Partnerships

Partnerships (representative list)	
Partner name	Details
Cisco	Global 360° partnership of more than 20 years for enterprise networking solutions and services around LAN, WLAN, WAN, SDN-DC, SD-WAN, SDLAN, cloud, Wi-Fi, network security, etc.
HPE Aruba	Global 360° partnership for enterprise networking solutions and services around WLAN, cloud, Wi-Fi, SDLAN, SD Branch, etc.
VMware	Strategic partnership for enterprise networking solutions and services on SDN-DC (NSX) and SD-WAN (VeloCloud)
Citrix	Provides enterprise networking solutions and other related services
Zscaler	Partnership to leverage cloud-based internet security and Zero Touch Network Access (ZTNA) solution to offer secured SD-WAN
Palo Alto	Enterprise solutions for network security and SASE solution
Riverbed	Networking solutions and services around WAN optimization
Juniper	Partnership enabling enterprise-wide SD-WAN and SDN networking solutions, AI-based wireless, network security, and other related services
Fortinet	Enterprise solutions for network security and SASE solution

Wipro profile (page 5 of 6)










Investments and recent activities

Investments (representative list)	
Investment name	Details
Investments	<ul style="list-style-type: none"> • Invested in CloudKnox and Vulcan to enhance its network portfolio, security, and automation framework • Evaluates and invests in next-generation start-ups and innovate with the partner ecosystem to derive mutually enhanced propositions • Invested in CoE labs, customer demo kits, migration accelerators, and frameworks • Utilized the Multi-Domain Orchestrator (MDO), Wipro's IP, for orchestrating domains such as LAN, Wi-Fi, WAN, SD-WAN, and SDLAN • Utilized the Cognitive Digital Network Infra (CoDNI), Wipro's IP, which integrates user, business, and application intents and enables network automation • Invested in AI/ML for network automation and self-healing capabilities and plans to add more functionality to the existing stack of solutions
Trainings and certification	<ul style="list-style-type: none"> • Training in digital skills: SDN, Infrastructure as Code (IaC) through the Wipro Network Academy and industry-led training and certification programs • Around 60% of network engineers trained and certified in SDN and network programming skills, positioning Wipro among the top three global partners in Cisco's BlackBelt academy

Wipro profile (page 6 of 6)

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

- Enterprises looking for multi-geographic network transformation with automation will find Wipro an ideal fit due to its delivery model and automation capabilities leveraging its proprietary HOLMES automation platform
- Wipro’s Insightix framework can help enterprises looking for consulting-led engagements to accelerate and meet their network transformation goals with thorough assessments, benchmarks, and roadmaps
- Enterprises looking for network transformation will benefit from Wipro’s #WANFreedom, which delivers full services for SD-WAN, and Wipro CoDNI for integration capabilities in SDN
- Clients have appreciated technical expertise, domain expertise, flexibility, and transparency in pricing presented by Wipro during network services engagements

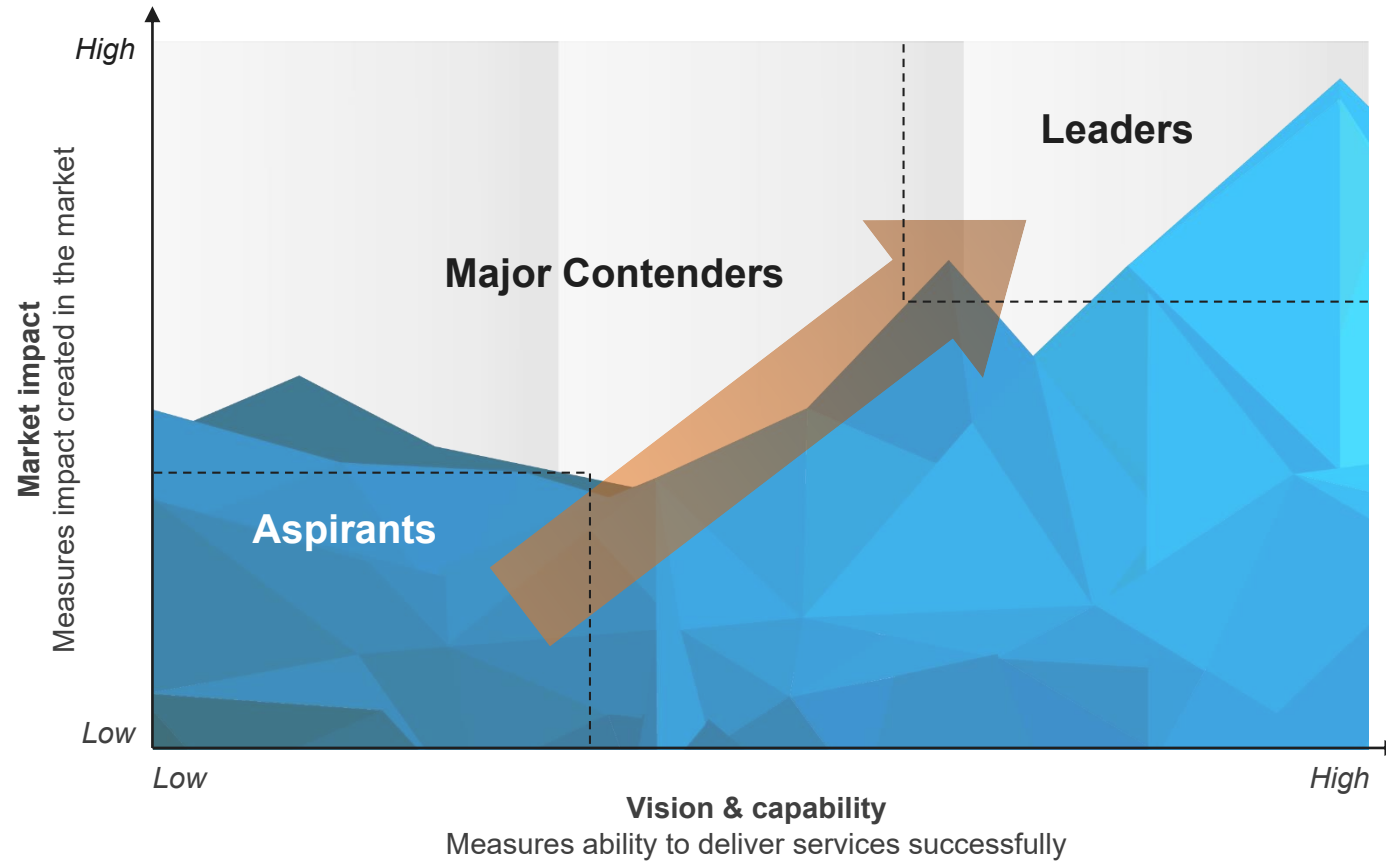
Limitations

- Small and mid-sized enterprises looking for low-cost solutions might not find Wipro a good fit as it is less price competitive compared to its peers
- Wipro relies on third-party professional services for local resources and maintenance in certain geographies. Enterprises are advised to validate availability of resources during the initial stages of the deal
- Some clients have highlighted that Wipro needs to be proactive in leveraging advanced analytics and automation to embed continuous service improvement as part of its network services engagements
- A few clients have mentioned talent management, project management, and budget planning as key challenges with Wipro during network services engagements

Appendix

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

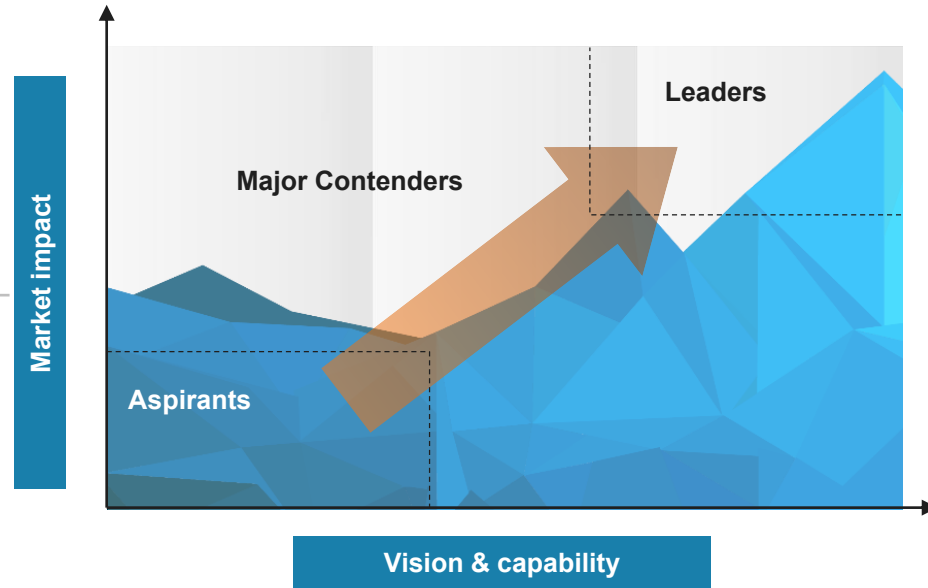
Everest Group PEAK Matrix



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



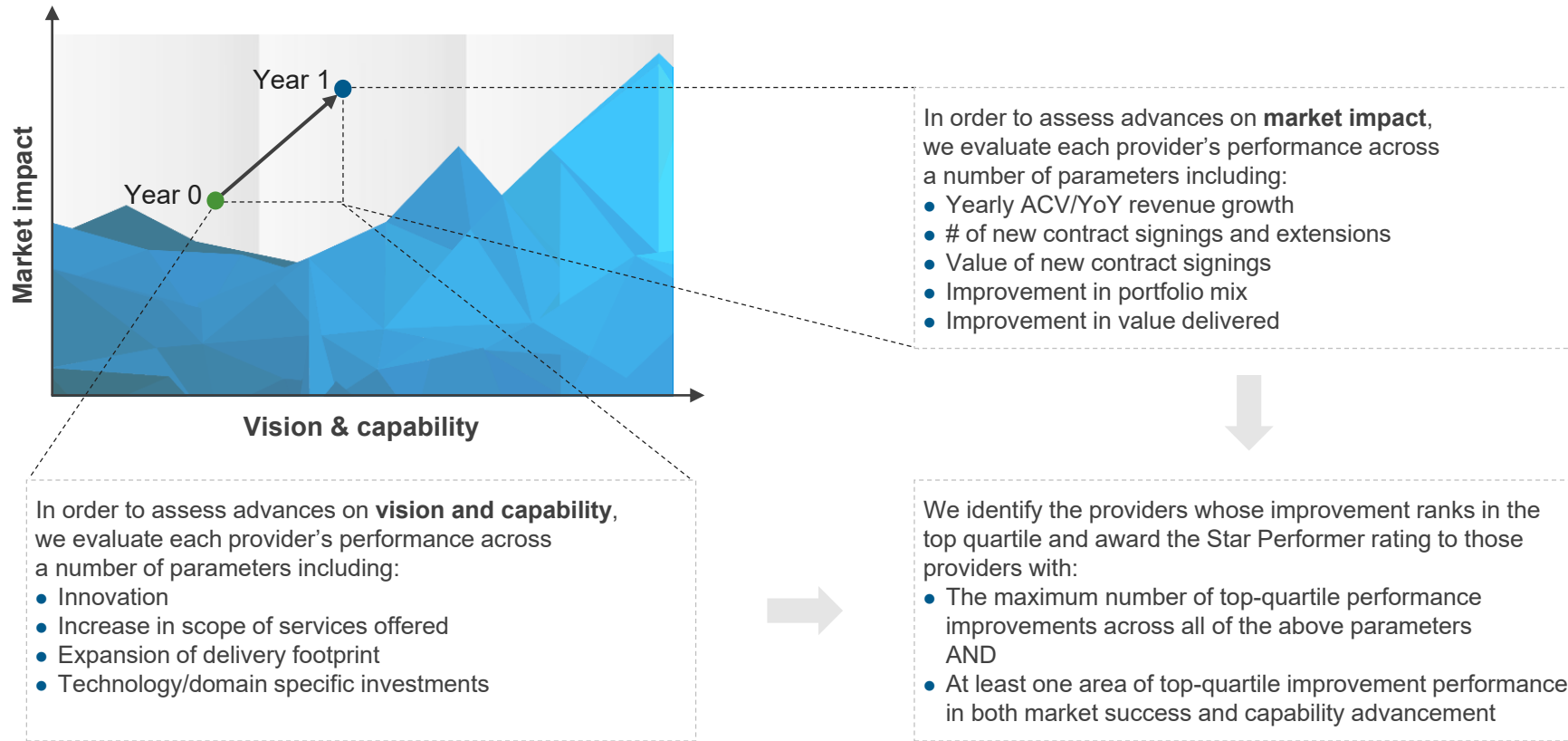
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (email 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 Everest Group; please contact your CD or [contact us](#)

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

PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.



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Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

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