



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

Focus on Accenture
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

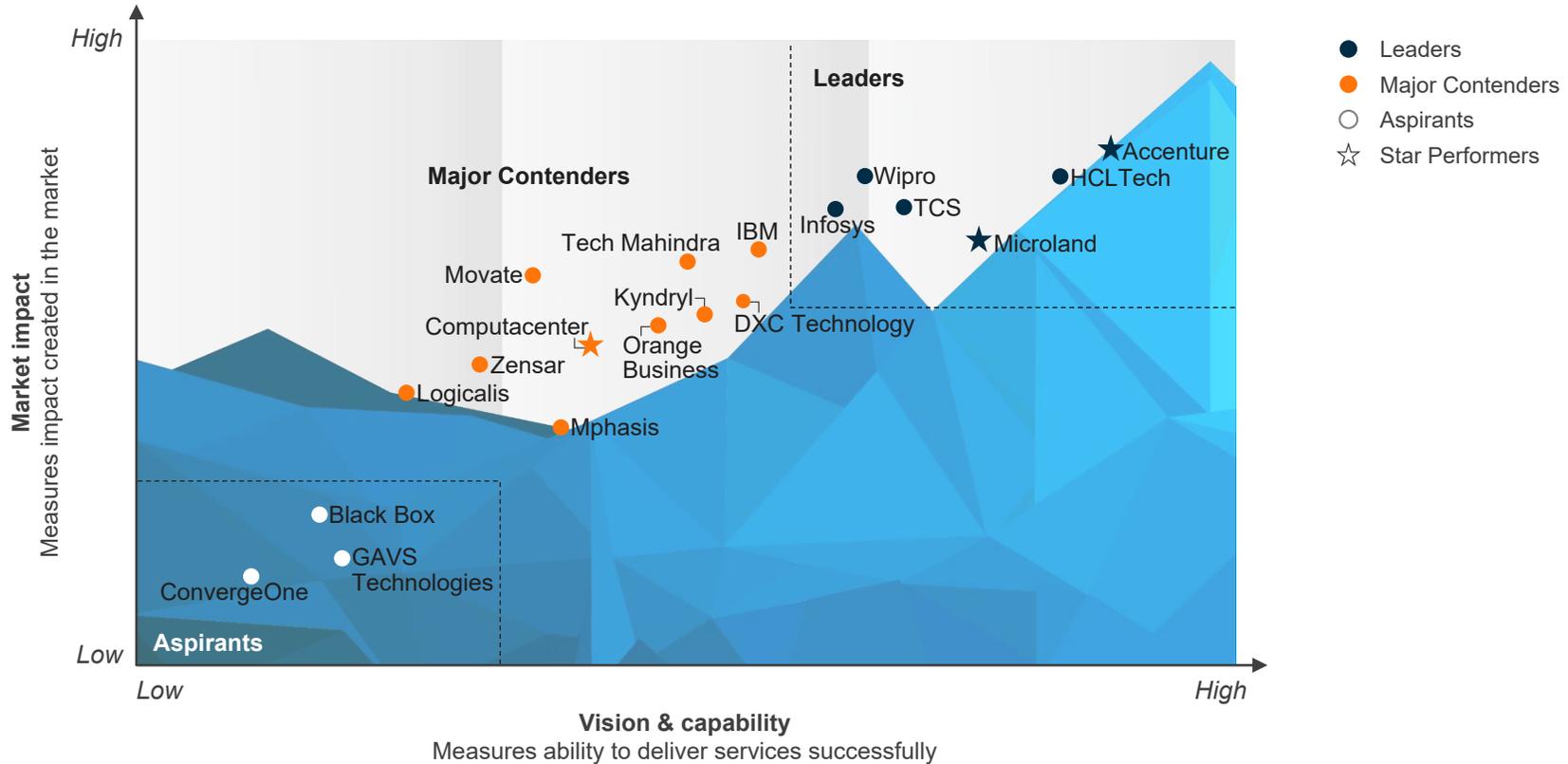
- Aspirants are entering the market with increased emphasis on specific segments of network services rather than a focus on comprehensive portfolio, with limited investments in industry-specific offerings
- While these providers are focusing on smaller deals in specific geographies, they are also gradually 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 | Accenture is positioned as a Leader and a Star Performer



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)

Accenture profile (page 1 of 6)

Overview

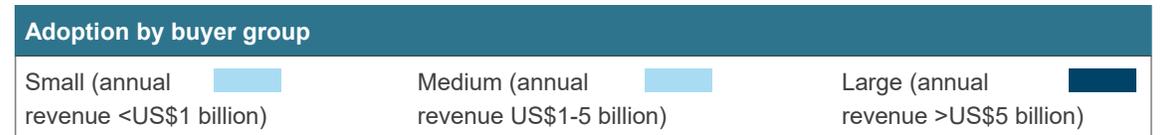
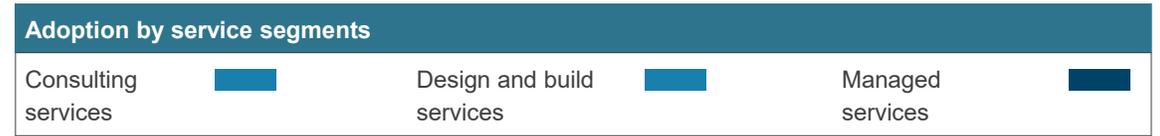
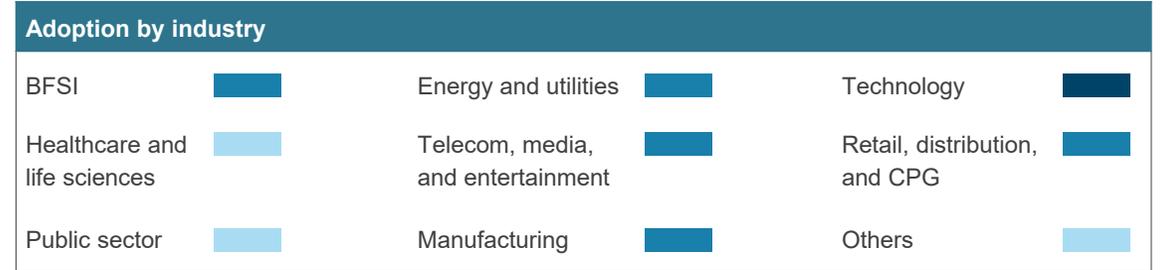
Vision:

Accenture’s vision for network services is to be the trusted system integrator that can help enterprises with reinvention, enabling cloud transformation, and a secure positive user experience through real-time operations, cloudification of networks, connectivity anywhere, and the enablement of zero trust security. Accenture’s strategy is built on three elements comprising their offerings – cloud networks, critical networks, and communications networks. Accenture’s broad set of services that range from ideation to the design, development and managed services, helps enterprises to create a fit-for-purpose network that unlocks performance and unleashes competitive advantage in multiple industry segments.

Revenue from network services (2022)



Legend: Not available (grey), Low (<10%) (light blue), Medium (10-20%) (medium blue), High (>20%) (dark blue)



Accenture profile (page 2 of 6)

Case studies

Case study 1

SDN transformation and automation of network operations through network evolution, SD-WAN, and SD-DC

Client: a global financial services company

Business challenge

The client's existing global network infrastructure, which was already transformed by Accenture, needed a further revamp. The client wanted a service provider to drive its SDN transformation. It had more than 1,000 sites to manage with around 105,000 users and more than 6,000 routers/switches.

Solution

- Transformed the global network infrastructure spanning 66 countries and 49 BUs, to a single global SD-WAN estate via VMware VeloCloud
- Transformed the overall architecture to be cloud-ready, and built upon carrier-neutral services predominantly using Internet-as-Transport
- Replaced End-of-life (EOL) data center infrastructure; above 500 EOL switches were replaced across Europe and North America while introducing SDN via Cisco ACI to streamline operations

Impact

- Reduced TCO by around 25% on an average
- Suppressed false alerts by 63%, and achieved an incident avoidance rate of 22%
- Automated nearly 23% of monthly service requests and 62% of standard tasks
- Migrated around 22,000 user ports to ACI

Case study 2

Accelerated network transformation and modernization

Client: a large global insurance company valued above US\$50 billion

Business challenge

The client had a fragmented technology landscape with a myriad legacy network technologies and tools having limited user mobility, collaboration, and operational capabilities. This was coupled with stringent security and compliance requirements, pervasive technology debt, and a high employee attrition rate. It aspired for a higher ROI and better business capabilities.

Solution

- Transformed the client's contact center; implemented a field service model, standard SLA, and a KPI model
- Supported the network's projects for acquisitions and divestitures
- Implemented an aggressive WAN network transformation schedule replacing legacy technologies
- Provided field services for onsite support through a global partner network

Impact

- Achieved global 24x7 on-time support with minimal business disruption
- Achieved regulatory requirements and enabled compliance adherence for devices
- Defragmented IT needs through migration to the cloud
- Provided the capacity to support additional projects on short notice, thereby increasing business capabilities

Accenture profile (page 3 of 6)

Solutions/IP/Products

Solutions/IP/Products (representative list)

| Event name | Details |
|-----------------------------------|--|
| Cloud Network Operator | Cloud Network Operator is a complete network platform used to automate the deployment, management, and monitoring of multi-hybrid cloud networks across AWS, Azure, and GCP. It allows deployments and the automation of Cloud WAN, spoke networks, firewalls, DNS, SASE and Zero Trust, SD WANs, VPNs, private networks, cloud interconnect routers, and more. |
| myNav® | myNav helps to navigate the cloud landscape and select the right architecture and cloud solution, to integrate networks and infrastructure to meet business needs based on cost, implementation, compliance, and environmental sustainability. It is designed to assess, architect, and simulate cloud solutions to determine the right fit based on a set of variables. |
| Network Business Case | myNav's Network Business Case module helps determine the client's WAN infrastructure high-level spend, discover the network landscape, and make a case for cloud network migration. |
| myWizard® | <ul style="list-style-type: none"> • This is Accenture's signature platform for intelligent software engineering and IT services delivery • The platform brings together Accenture's technology and industry assets, powering them through analytics and AI, and collaborates with the partner ecosystem. It simplifies client delivery through automation (such as network deployment life cycle workflow) and integration functionality such as plug and play, single-click provisioning, virtual agents, and mobile alerts • myWizard is a liquid, modular platform that improves service delivery and provides business intelligence through the integration of proprietary methods, intelligent tools, and assets. It enables a common data fabric and integration of multiple proprietary and third-party analytics, automation, and AI |
| Change Advisor | The solution informs engineers about high-risk changes that are most likely to fail, providing actionable insights that would help them remediate in advance before change deployment. |
| Network Compliance Advisor (NCA) | NCA aims to assess the client's current network's hardware and software and provides a forward-looking view of the network components. An overall compliance status is determined by analyzing the defined standards and support from OEM for hardware and software compliance. |
| Agent Assist Knowledge Advisor | This solution provides resolution insights and predictive analytics using ML. It hosts an integrated knowledge search that provides feed from multiple data sources such as Last Day Of Support (LDOS) / End-of-Life (EOL), to provide potential insights. It also provides incident / agent skill mapping capability for quicker resolution. |
| Intelligent Alerts Prioritization | The solution uses advanced analytics techniques to determine the normal behavior of infrastructure elements and sets dynamic thresholds for the monitoring tools accordingly. This reduces the false alerts generated due to setting static / judgment-based thresholds for monitoring tools, thus reducing the TCO to manage the network. |
| Insights 2.0 | Insights modules are apps that focus on specific themes such as the identification of repeated incidents, incident avoidance/reduction opportunities, RPA/automation opportunities, and improving end-user experience built on three levels of deep text analytics. It is augmented with an advisory service, wherein recommendations are made on potential actions to take. |
| Automation Miner | This is an ML-based analytics asset that helps to identify automation opportunities by scanning and providing in-depth analysis of the current client automation posture and recommending orchestration techniques. It improves operational visibility by categorizing and tagging ticket data by issue types, leveraging deep text analytics, and matching it against the available automation catalog. |

Accenture profile (page 4 of 6)

Partnerships

| Partnerships (representative list) | |
|------------------------------------|---|
| Partner name | Details |
| Cisco | Cisco and Accenture have collaborated by investing in innovation labs and demo centers to help support talent development, demonstrate Proof of Concepts (PoCs), and share thought capital. These investments modernize the joint solutions and digital enablement capabilities and offerings. They are currently working to define solutions for implementing private 5G and Wi-Fi 6. |
| Amazon/AWS | Accenture and AWS launched the Accenture AWS Business Group (AABG) to drive business value in the cloud and networks space. |
| Google/GCP | Accenture offers Anthos for application deployment and management across distributed platforms, Open Platform for application development and integrations (e.g., Apigee), deployment of customer applications with joint edge solutions and third-party solutions, and scalable global cloud infrastructure with edge Point of Presence (PoPs) and Google network. |
| Microsoft/Avanade | The joint venture with Avanade focuses on expanding capabilities globally and for joint solution development in services focused on user experience, analytics and AI, cloud, security, IoT, and other areas. |
| Dispersive Networks | This partnership is used for a multi-cloud, multi-path networking technology that is secure and can be deployed for disruptive tolerant networking, and to address the cyber risks of Store Now, Decrypt Later (post-quantum), man-in-the-middle, distributed denial-of-service, and border gateway protocol attacks. It is also focused on enabling edge-to-cloud use cases such as private 5G deployments or cloud network modernization. |
| Zscaler | This partnership helps to address advanced and large-scale customer needs in the Zero Trust space, to ensure continued security improvements, and to support larger network/cloud transformation journeys. |
| Juniper | Accenture integrates its networks practice with Juniper’s cloud-native, SDN-based solution; open and interoperable RAN Intelligent Controller (RIC) platform; and end-to-end service management and orchestration (SMO) combined with securing the edge infrastructure to help accelerate Telco and Edge Cloud deployments. |
| Nokia | The partnership includes deploying Nokia’s private wireless solutions at labs globally and Accenture’s resources for attaining NDAC certifications in sales, integration, and support. |
| Ericsson | This partnership helps to accelerate private network deployments. |
| Equinix | It has a partnership with Equinix to expand and scale global SD-WAN and enterprise cloud network solution deployments through Equinix’s Network Edge and Equinix Fabric platforms. |
| Fortinet | This partnership helps to develop and sell cybersecurity solutions, such as physical firewalls, antivirus software, intrusion prevention systems, and endpoint security components. |
| HPE Aruba | Accenture HPE Greenlake Edge is a joint offering providing edge compute services for private LTE/5G, retail, manufacturing, and industrial solutions in an aaS commercial model. |
| Palo Alto Networks | Having collaborated on more than 100 joint engagements, Accenture has partnered with Palo Alto to integrate, productize, and launch Prisma Access Cloud Firewall into the market. |

Accenture profile (page 5 of 6)

Investments and recent activities

Investments (representative list)

| Investment name | Details |
|-----------------------------|---|
| Acquisitions | <ul style="list-style-type: none"> • Since its launch in September 2020, Accenture Cloud First has acquired 19 cloud service organizations globally. They are Soltius/Zag, Enimbos, Olikka, Wolox, Imaginea, InfinityWorks, Cygni, Linkbynet, Industrie&Co, CS Technology, TrivadisAG, Wabion, BENEXT, Headspring, AFD.TECH, Ergo, XtremeEDA, Tenbu, and Sentia • In October 2021, Accenture acquired Umlaut Telecom, an engineering consulting and services firm. This acquisition scales Accenture’s deep engineering capabilities to help companies use digital technologies such as cloud, AI, and 5G to transform how they design, engineer, and manufacture their products as well as embed sustainability into them |
| Investments | <ul style="list-style-type: none"> • Enabled user experience managed service by leveraging Cisco’s ThousandEyes acquisition supported by a Center of Excellence (CoE) • The Accenture Intelligent Network Platform (AINP) provides a one-stop shop solution for migration planning and execution • Accenture IDOP (predefined automation routines), myWizard – Automated Ticket Resolution (ATR) and Guided Ticket Resolution (GTR), and Cloud Network Operator (CNO) to drive network automation across enterprises • AWS and Azure Network Secure Cloud Foundation are examples of co-developed solutions • Accenture has built multiple business groups –comprising integrated teams, with a CEO-to-CEO connect, joint pipelines with revenue targets, as well as pre-defined commercial agreements, which makes it easier for enterprises to begin their cloud/networks initiatives |
| Trainings and certification | <ul style="list-style-type: none"> • Accenture has over 450 Zscaler-certified professionals across the globe • It upskills and cross-skills employees through training, certifications, and project engagements, and encourages employees to use different forums to connect with experts in their fields • It has enabled an organization-wide investment of about US\$1 billion in learning and professional development, focused on beginner, intermediate, and advanced programs in emerging technologies • Virtual instructor-led Cloud First Networks (CFN) Masterclass conducted across multiple regions (North America, Europe, Middle East, Africa, Latin America, and APAC) supports the continual learning of CFN resources • Training through an offerings overview and key case studies across the cloud, communications, and critical networks; CFN Network Labs; CFN Assets; Accenture solution tablets; and client roleplays to support conversation / opportunity development, etc. |

Accenture profile (page 6 of 6)

Everest Group assessment – Leader and Star Performer

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 will benefit from Accenture'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 Accenture a fitting partner due to its strong cloud-native network capabilities and solution portfolio embedded with its myNav™ offering
- Enterprises adopting multi- or hybrid-cloud network models will find Accenture a suitable fit as its cloud-native automation-driven platform facilitates a smooth transformation
- Accenture is appreciated by clients due to its collaborative approach and ability to introduce innovation in key areas to enhance efficiency

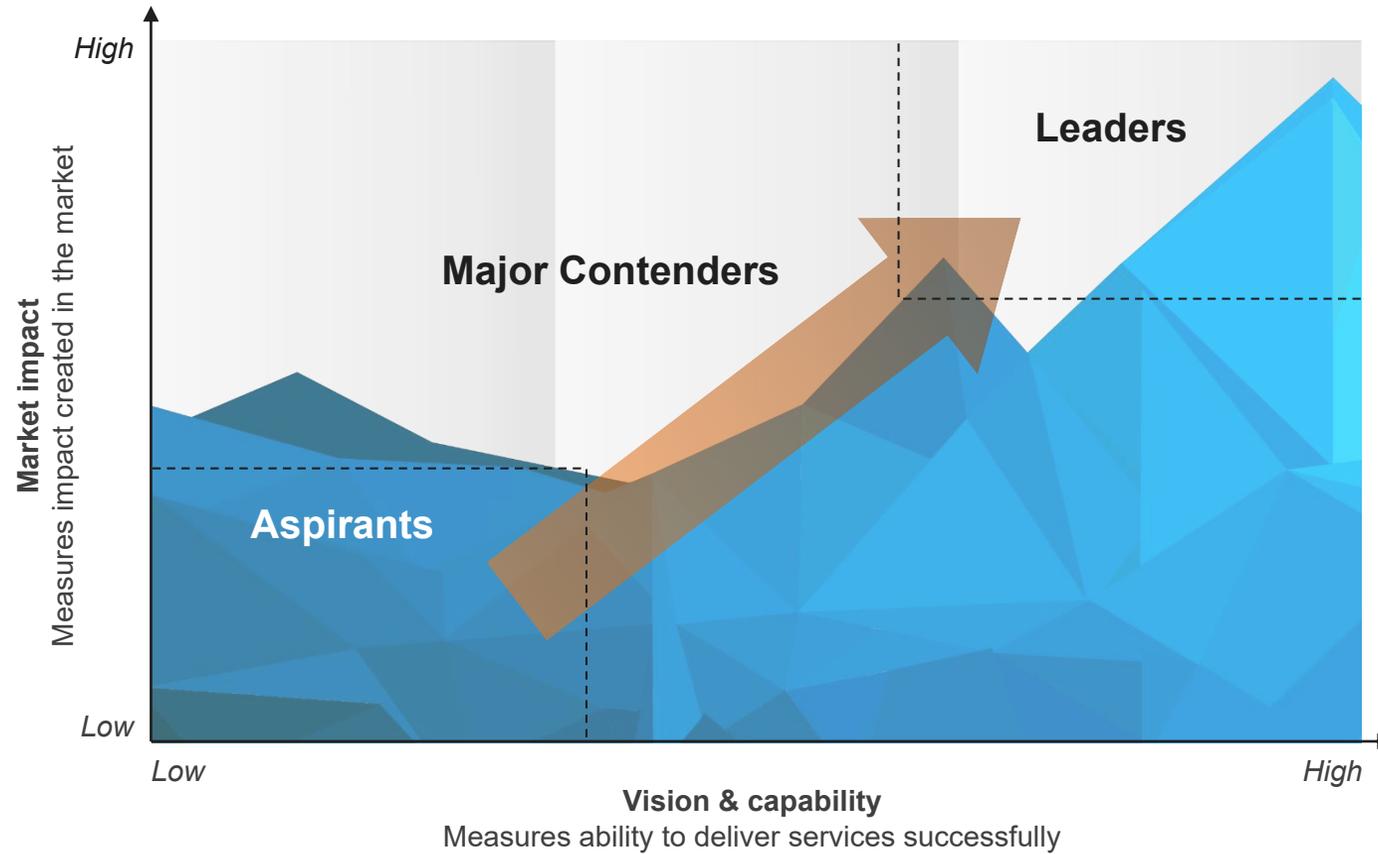
Limitations

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

Appendix

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

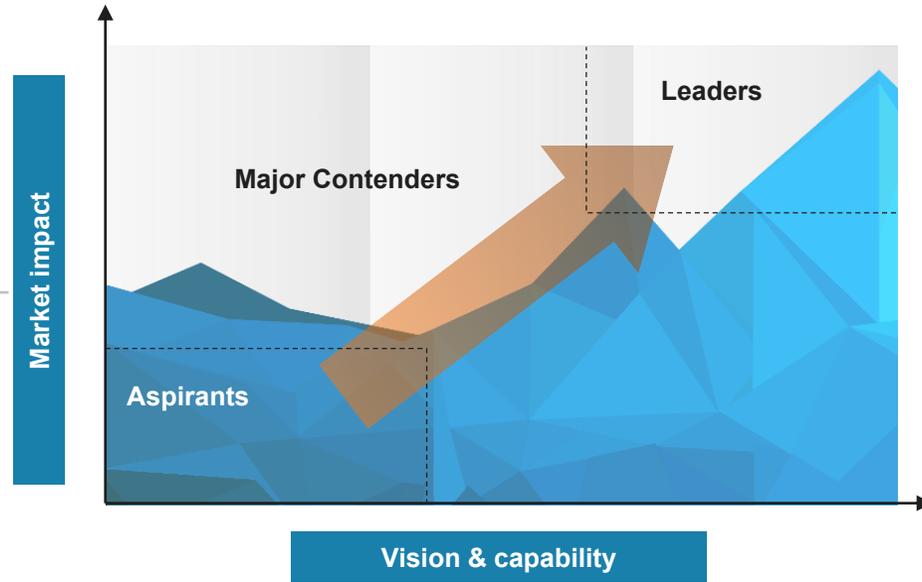
Everest Group PEAK Matrix



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



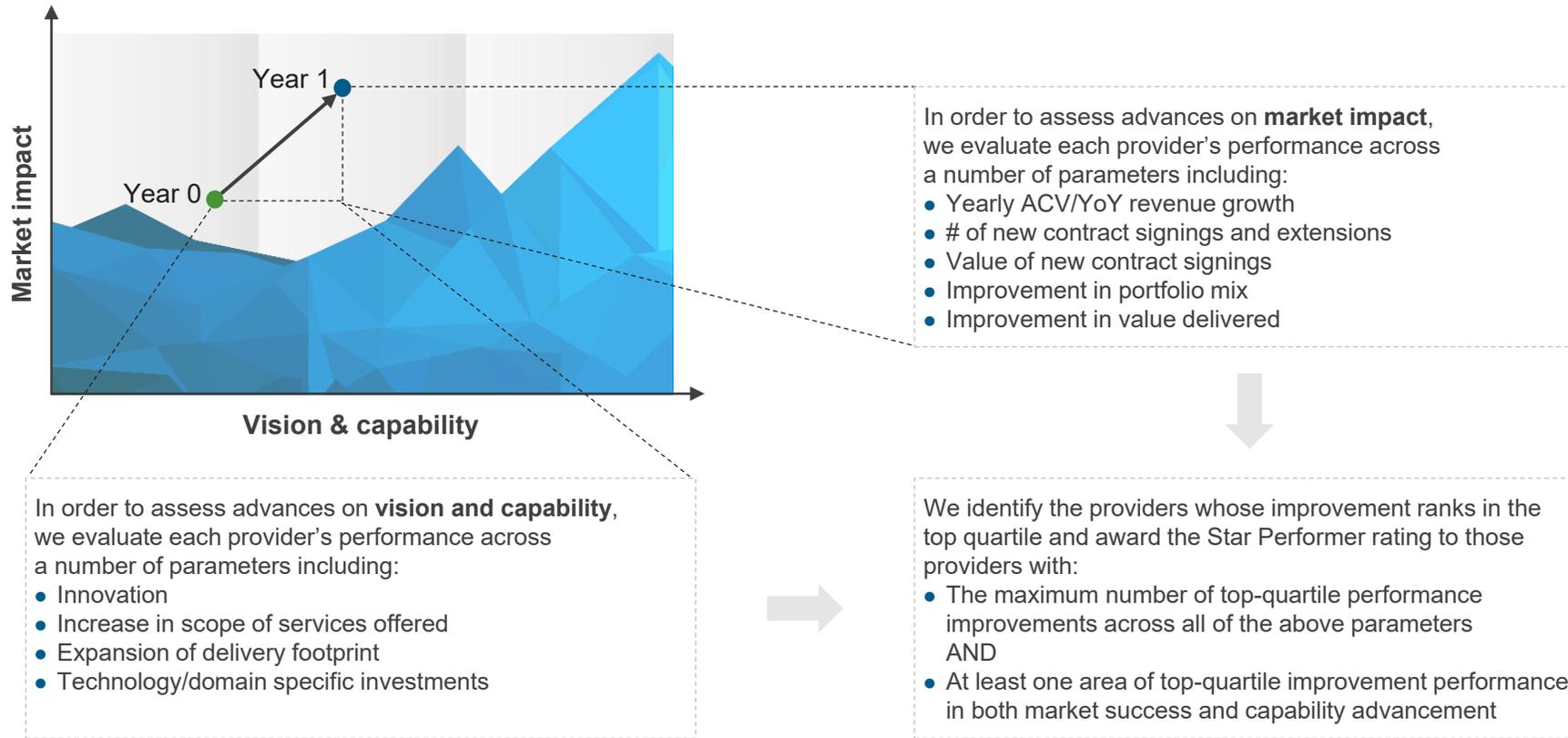
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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