



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

Focus on TCS
October 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

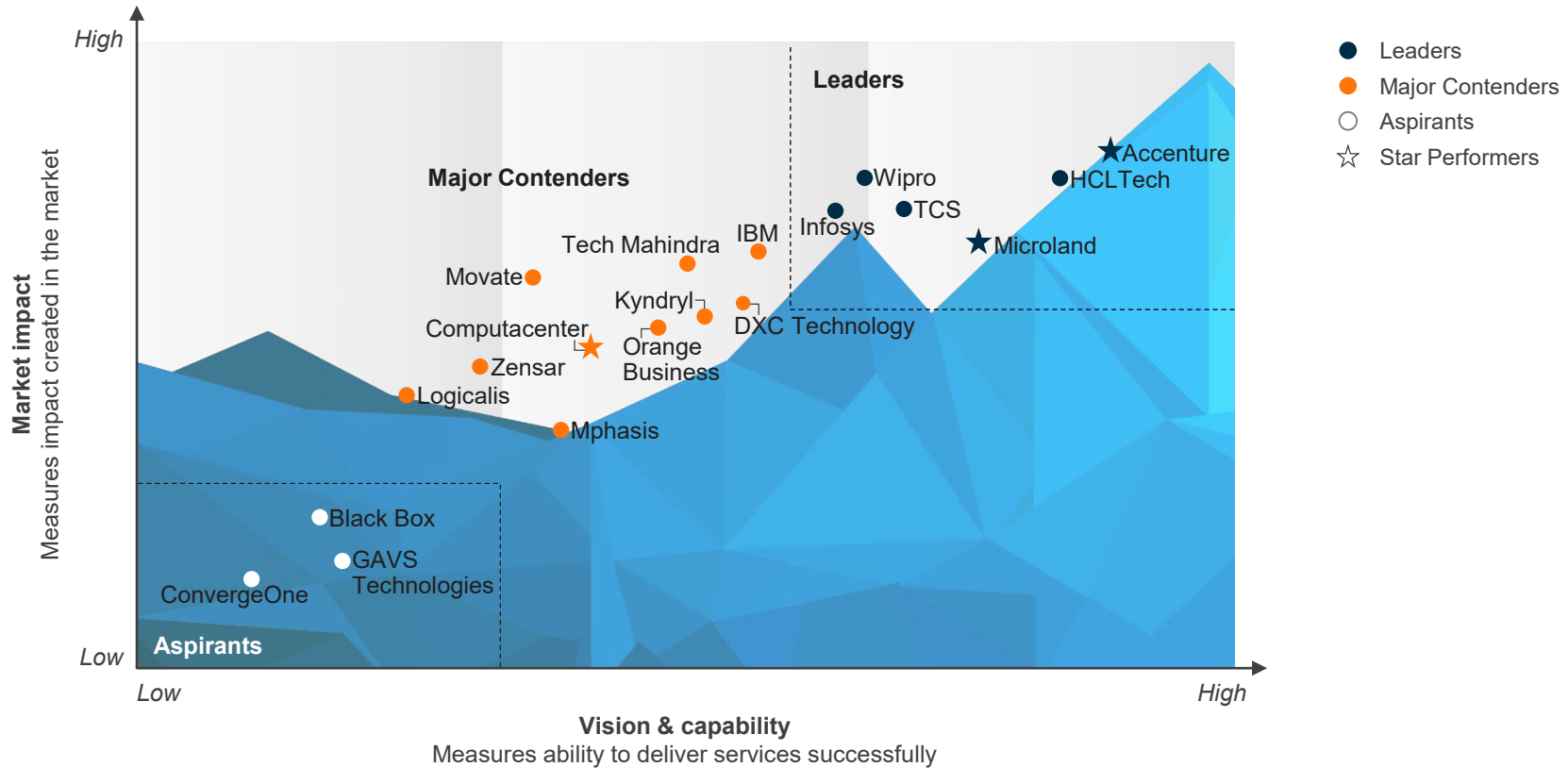
Black Box, ConvergeOne, and GAVS Technologies

- 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 | TCS 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)

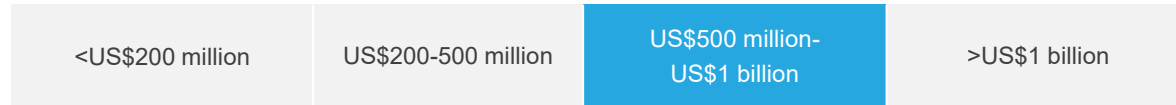
TCS profile (page 1 of 6)

Overview

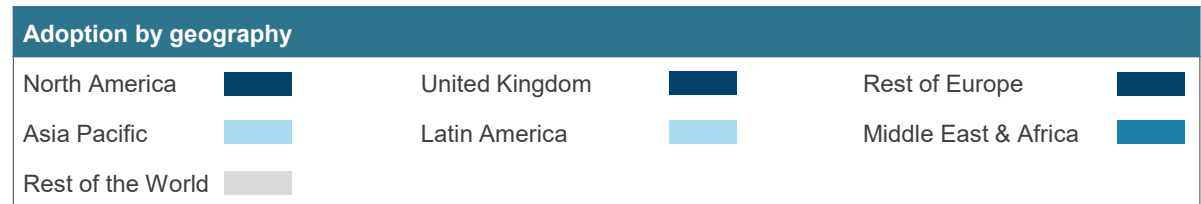
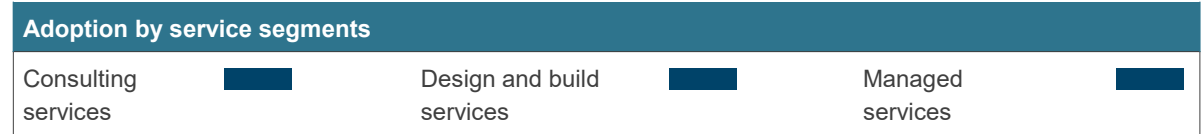
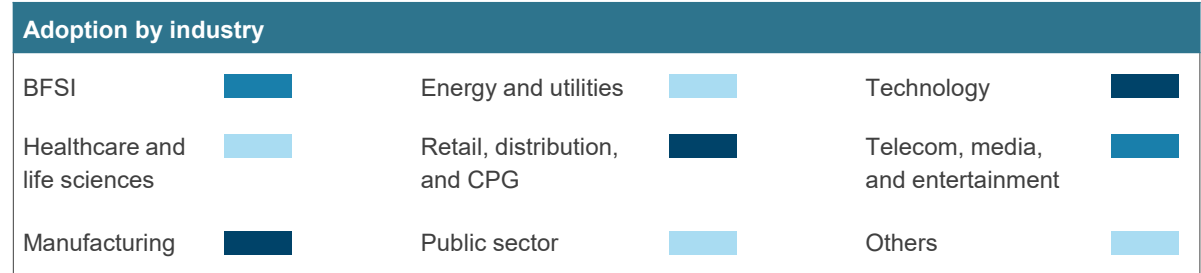
Vision:

TCS aims to be the preferred partner of choice for enterprises in network transformation domain, by providing best-in-class business-focused transformation solutions, leading to improved Quality of Experience (QoE) and increased business agility along with reduced TCO.

Revenue from network services (2022)



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



TCS profile (page 2 of 6)

Case studies

Case study 1

Network modernization – aligning to business demands for the client’s digital journey

Client: a Swedish multinational engineering company

Business challenge

The client wanted to transform the existing legacy hardware/software of its network based on a decentralized architecture where the network was managed in multiple datacenters. The environment was complex with costly Multi Protocol Label Switching (MPLS), and there was a lack of standardization. The network was unsuitable for remote jobs.

Solution

- Created a centralized architecture with SilverPeak SDWAN as the core
- Deployed Zero Trust network through Zscaler and SEIM
- Replaced MPLS across more than 400 sites with Direct Internet Access (DIA)
- Deployed transformation themes – internet first, cloud first, and concept-of-zero themes
- Deployed the Cognix™ platform to provision a single pane of glass and cognitive automation

Impact

- Catalyzed rollout window from six weeks to four days
- Improved network performance by 70%
- Improved network availability by 40%
- Reduced operations cost by 30%

Case study 2

Network transformation – implementing and supporting operations

Client: a leading American food, agricultural, and nutrition giant

Business challenge

The client’s network was complex and based in a heterogeneous environment with legacy hardware. Network management in multiple datacenters required multiple skills and hence more resources. The WAN environment was complex to manage.

Solution

- Designed and implemented around WAN, LAN, security, voice, and SD data centers such as Cisco ACI Multi Pod, comprising 4 Spines and 76 Leaf switches
- Proposed engineering functions focused on capacity, availability, optimization, architecture, and low-level design
- Provided L1 to L3 24x7 year-round operational support and proactive monitoring through the Network Operating Center (NOC)

Impact

- Achieved TCO reduction of 47%
- Attained around 20% savings through automation
- Shortened provisioning window by 40%

TCS profile (page 3 of 6)

Solutions/IP/products

Solutions/IP/Products (representative list)	
Event name	Details
Cognix™ for Networks – TNaaS	This is a platform service for monitoring and managing hybrid network infrastructure. TCS offers TCS Network-as-a-Service (TNaaS) as a single pane of glass for enterprise network monitoring and management.
NaaS Solution for outsourcing networks	TCS delivers networks in a business-aligned and cost-effective NaaS model, where clients need to empower TCS as the guardian vendor to manage service delivery actors.
TCS CogniX™ platform	The platform enables a configurable enterprise. It is an end-to-end IT operations platform hosted as a multi-tenant platform for all IT Infrastructure monitoring and service management.
HOBS™ Connected Devices Management (CDM)	It is a platform to deliver end-to-end assurance and service fulfilment across telco network, enterprise network, and home network domains. It acts as a single pane of glass for provisioning of different services, monitoring of hybrid network environment, capturing faults/events from the environment, support event correlation, and enable root cause analysis.
Netomate	It is an integrated automation framework for the testing of physical and virtual network functions, as well as network services in multi-vendor ecosystem integrated with Git and Jenkins for continuous testing.
Network Cerebrum	It is a centralized master orchestration tool to manage the multi-vendor network security platform across different business verticals. It provides configuration, monitoring, troubleshooting, automation, and AI/ML predictive analytics for enterprise network security.
Cognitive Controller	The framework provides application-aware provisioning for users on the move. It also facilitates network-aware configuration of the applications as well as autonomic management and orchestration. It is designed for predictive learning and proactively prescribing actions based on the Sense, Analyze, Decide, and Respond (SADR) mechanism.
Cognitive Network Operations (CNOPS)	CNOPS helps telecom companies and large-scale network operators to monitor network health, predict possible failures, and maintain exceptional service quality.

TCS profile (page 4 of 6)

Partnerships

Partnerships (representative list)	
Partner name	Details
Cisco	TCS and Cisco are gold partners in the US and India, and premier partners in the UK and have been partners for over 25 years. # TCS is a global Managed Services Partner (MSP) to Cisco.
HPE/Aruba	The partnership with HPE aims to provide hyper-connected networks for retail businesses that offer seamless connectivity for corporate offices, sales centers, warehouses, and retail stores, providing a purpose-driven network for predictive management. TCS and Aruba also offer a Digital Workspace Solution (DWS) for employee mobility and collaboration to increase employee productivity with a work-from-anywhere feature and role-based access.
Tata Communications	The partnership with Tata Communications focuses on providing bundled services covering the Enterprise-to-Enterprise (E2E) network value chain and offering NaaS services. They also work closely to provide managed SD-WAN services to enterprises.
NetFoundry	NetFoundry is a niche product providing ZTNA and SASE functionalities. TCS has a partnership with NetFoundry in providing managed SASE services by leveraging unique features such as application-specific programming.
Juniper Networks	In the network space, TCS and Juniper offer solutions across the network value chain, including WAN, LAN, DC, and security.
Arista	TCS works with Arista to provide branch and data center transformation services for various enterprise customers.
VMware	It provides end-to-end services on top of VMware's network offerings.
Zscaler	TCS leverages Zscaler internet access and Zscaler private access to provide secure connections between users and applications.

TCS profile (page 5 of 6)

Investments and recent activities










Investments (representative list)

Event name	Details
Investments	<ul style="list-style-type: none">• Investing in the Network as Code module in the Cognix platform, through an NetDevOps framework as an accelerator; with an objective to bring programmability in the network life cycle management, it leverages vast Ansible task library along with Netbrain, AppviewX, and Gluware• Investing in building additional modules in CNOPS and Ceribrum offerings
Training and certification	<ul style="list-style-type: none">• Multiple modes of training - digital, instructor-led, and partner-led training• Signature programs comprise strategic programs for leadership. Digital courses comprise programs and content in fresco play to increase focus. Partner-based learnings have specific programs and boot camps with partners including niche players• About 83% of associates are certified in one or more technologies• Global labs: labs set at various delivery locations to improve the learning experience• Digital Sideliners program: accelerates moving from Business As Usual (BAU); includes leadership programs to evangelize non digital resources

TCS 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 large-scale network transformation may find TCS to be the right fit due to its strong domain expertise and proof points of delivering complex network transformation
- It has made significant investments in network automation and orchestration offerings leveraging Cognix™ for networks, such as network-as-a-code and single pane of glass for hybrid network management, through its NetDevOps framework
- Large and mid-sized enterprises looking for cost optimization in their network transformation deals may benefit from TCS’ focused narrative on TCO reduction and advanced methodologies for delivery assurance
- Clients have appreciated TCS’ solutioning and contractual flexibility for network services deals along with its pool of skilled and talented resources

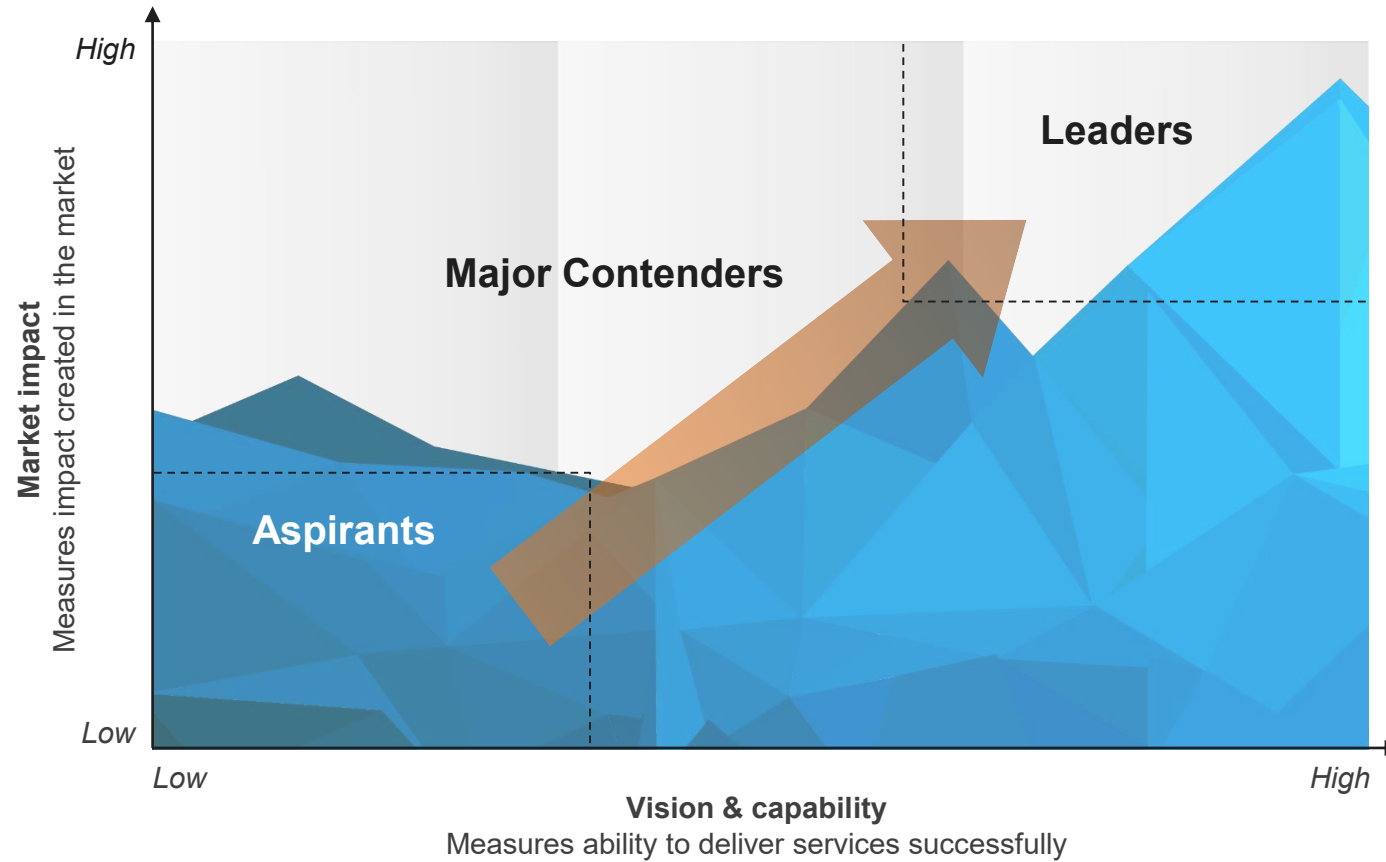
Limitations

- While TCS does have strong network capabilities, enterprises should look out for its lack of proactiveness in offering automation- or innovation-led business cases for network transformation
- Small enterprises should carefully evaluate TCS’ offerings as it focuses mainly on large deals and may not offer the best value proposition for minor transformation projects
- A few clients have highlighted that TCS needs to proactively pitch innovation in its network services offerings and reduce implementation gaps
- Some clients have highlighted strategic planning and proactive management as an area of improvement for TCS

Appendix

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

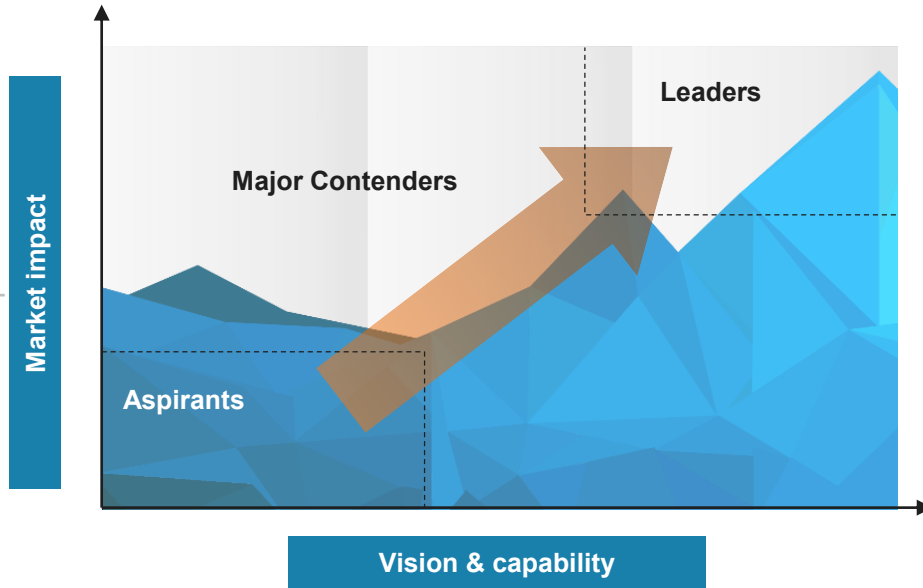
Everest Group PEAK Matrix



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



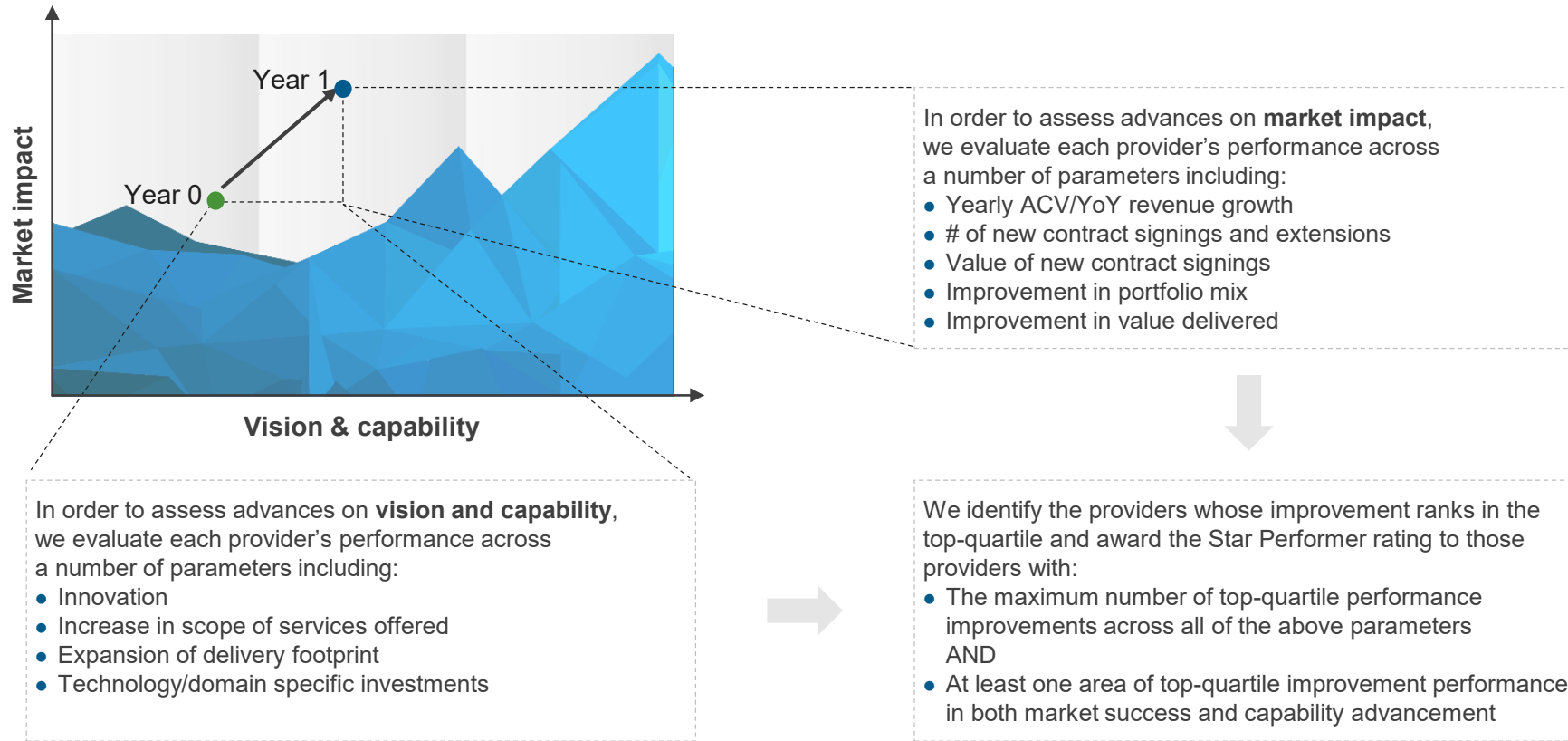
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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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