

Enterprise Network trends to watch



• Multi-Cloud



**Connected
End-points**



**Normalizing Hybrid
Workspace**



SSE Adoption

87% of organizations use Hybrid Multicloud services in 2023¹

15B+ (ITO endpoints will connect to enterprise infrastructure by 2029²

50%+ of workers expected to be remote part or all the time³

37% of CIOs deployed or plan SASE deployments by 2025⁴



AI Driven Operations and Observability

90% of IT operations management vendors will integrate AI capabilities into their products and services by 2026, up from less than 5% in 2023 ²

60% of IT infrastructure monitoring solution purchased include advanced Analytics features with operational insights including visibility for non-IT stakeholders ²

¹ Flexera, State of the Cloud Report, 2023

² Gartner, Feb. 2021

³ IDC, Mar. 2023

⁴ Gartner, CIO and Technology Executive Survey, Jan 2024

Network Consultancy & Advisory – Network Transformation/Modernization

WHAT IF....

- **End-user experience:** seamless and automated connectivity of devices to the network, Incident resolution before noticed, stay connected to business applications anytime, anywhere
- **Secured Workload:** Security policies consistently applied, reduce risk of vulnerabilities and attacks.
- **Agile Transformation & Flexible Delivery:** Network demands and projects were realized on-time. Real-time end-to-end insights into infrastructure. Ability to consume network capacity on-demand

CUSTOMER PROBLEMS TO SOLVE

- **Poor User Experience:** Application Access & Performance, Network Access & Roaming issues
- **Security Compliance:** Data protection and Compliancy Regulations issues
- **Complex:** Lengthy time to identify and resolve incidents, Low success rate on change, Resiliency constraints
- **Flexibility Constraints:** Capex driven consumption models, High TCO, No cost-efficient connectivity
- **Stagnated Business Transformation:** Long GTM lead-times, Delays in project delivery
- **Lack of Insights:** No real-time end-to-end visibility and application aware insights
- **Limited Automation:** Traditional engineering and Operations approach
- **Global Coverage:** Difficulties to deliver globally at scale

WHERE DXC CAN HELP

DXC helps companies in navigating the evolving network technology landscape, leveraging advanced technologies and empowering platforms for future readiness while managing costs and risks. Our Network team offers critical insights and solutions to develop strategies, improvements, and alternatives for network modernization, covering:

- Assessment and Consulting to move from current to future state
- Run pilot projects to validate the modernization approaches
- Deploy and Run Modernized networks
- Implement Next Gen intelligent operation tools
- Continuous Improvement and Collaboration

TARGET AUDIENCE

Be specific on roles of

- Stakeholders: CEO, CFO, IT (CIO, CTO, Head of IT), Application/Network Services Owners

DXC NARRATIVE

DXC assists customers in strategically planning, implementing, and optimizing their network environments. With expertise in complex network transformations, DXC offers tailored solutions to evolve network deployments, including performance optimization, enhanced security measures, and seamless integration with cloud services, while also providing the flexibility to transition to new platforms as needed.

HOW/WHAT TO SELL?

- **Scenario 1:** Network Consulting & Advisory: Sell Network Assessment to assess current state of the infra and deliver Network Modernization/Transformation Roadmap aligned to client business and digital transformation objectives Leadtime 6-8 weeks. Optional Add-on: Client Demo around SDN/DXC accelerators
- **Scenario 2:** Network Consulting & Advisory: Sell "Network Assessment" to assess current EoX HW/SW status and deliver Network HW/SW refresh strategy proposal focused on removing aging network infrastructure and enable the introduction of next-gen network solutions. Leadtime 6-8 weeks, Optional Add-on: Execute HW refresh project with or without managed service
- **Scenario 3:** Network Consulting & Advisory: Sell "Network Assessment" to assess the current WAN/MPLS footprint and propose SDWAN Modernization business case incl ROI to optimize (transport) costs, simplify operations and focus on improving security and application performance. Optional Add-on: Proposal for DXC SDWAN Demo and/or PoC for 2 sites

WHY DXC?

- **Skilled Workforce:** 2300+ Network professionals, 250+ Certified Full Stack Engineers
- **Agile Transformation:** Industrialized Processes, NetDevOps practice
- **Partner Eco-System:** 30+ OEM Partners across SDN, Tools and Cloud platforms
- **Continuous Innovation:** Intelligent Operations based on data-driven adaptive processes optimized through AI automation and Real-Time Analytics. Innovative COE labs and Experience Center
- **Cross-Industry experience:** 600+ Global Customers across all industries,
- **Global Presence:** Global Governance and GNOC delivery with local execution

COMMERCIAL MODELS

- ✓ CAPEX Purchase
- ✓ OPEX Finance

KEY ALLIANCES



CASE STUDY

WAN Modernization for Global Retail Client

Client had intent to modernize WAN for enhancing performance and save costs and thus partnered with DXC to achieve these goals by refreshing EOL Hardware
70% reduction in MPLS footprint
25% reduction in Transport cost

Network Services

Network Consulting & Advisory – Network Transformation/Modernization



Market / Trend Snapshot

- The global network services market is projected to grow significantly at a robust CAGR of approx. 6-8% from 2023 to 2030 reaching a value of \$150 billion by the end of the decade. The market is driven by increased digitalization, the rise of hybrid workforce models (45% today to 60% by 2030¹), innovation in emerging technologies such as 5G and the adoption of hybrid multi-cloud computing (50% today to 80% by 2030²), growing adoption of IoT endpoints (15B+ by 2029³), adoption of AI driven products and operations (90% by 2026¹). ¹ IDC, 2023, ² Flexera, State of the Cloud Report, 2023, ³ Gartner, Feb. 2021



Deal Snapshot

- Network Assessment – Assess and Propose SD-WAN roadmap, Business Case.
- Optional Upsell: SDWAN Transformation + Managed Service.
- Win rates for New Work/Renewals : HW Assessment, Refresh Modernization >85%. New Logo >60%
- Use Cases – Global Retail Major (Cisco), EU based Bank 85 sites (Fortinet) and DXC Global 50+ sites (HPE Aruba)
- Business Outcomes - 35% HW reduction, 25% Carrier spend reduction, 30% improved application performance, 70% increased workload security



Pricing Snapshot

- Network Assessment - Timeline: 2-3 weeks. Optional 2 sites POC
- Upsell- SDWAN Transformation + Managed Service – Timeline: ~1 year
- Why do we win? Multi-vendor SDN and Cloud Solutions, Strong Partner Ecosystem, Global coverage, Multivendor DXC tools platform, DXC accelerators (AI-driven solutions Runbook Automation, Incident Predictor, Modernization Director)



Conclusion:

- Initiate Network Modernization with Network Consulting & Advisory – Network Assessment. The network, often overlooked, is key to enable innovation, digital transformation, secure cloud migrations, and optimized application performance in today's IT/OT environments with hybrid workforce and hybrid multi-cloud infrastructures



What's Next?

- Initiate the network modernization conversation in any digital transformation, infrastructure upgrade, cloud/workload migration, or hybrid workforce scenario to avoid network bottlenecks.
- DXC offers consultancy & advisory services to assess infrastructure, define a future network roadmap, and deliver scalable transformation with HW refresh and software-defined/cloud solutions.
- Our vision focuses on Intelligent Operations—seamless, secure IT/OT network modernization using AI, automation, increased observability, and autonomous networking, all at a lower cost.

8%
Market Growth









































84%
New Work Win Rate

55%
<5m
Qualified & Unqualified

DXC
TECHNOLOGY

Network Partners Ecosystem

DXC's vendor agnostic approach to Network Modernization

	SD-WAN SD-LAN Legacy	Data Center / SDDC	Connectivity / Tools / Performance Management	Cloud Networking	Network Security / SSE	Collaboration / Voice	Wi-Fi LTE / 5G
Partner	  	 			  		 
Strategic	 		  	  	  	 Amazon Connect	 
Tactical			 		   		
Niche			 				

Network Customer Wins

Cross Industry, Cross Technology, Multi-Vendor

Aerospace and Defense 	Automotive 	Banking and Capital Markets 	Consumer and retail
Energy Utilities Oil and Gas 	Healthcare 	Insurance 	Life Sciences
Manufacturing 	Public Sector 	Technology Media & Telecommunications 	Travel, Transportation and Hospitality

	SDWAN	SDLAN	SSE	PLTE	SDDC
Oil and Gas				✓	
Retail	✓	✓			
Food industry	✓		✓	✓	
Banking and Finance	✓				✓
Energy	✓		✓	✓	
Aerospace and Defense	✓	✓	✓		✓
Manufacturing /Automotive	✓			✓	
DXC In-House	✓	✓	✓		✓

EU Technology Major Public Sector SDN

- Cisco SDLAN, SDWAN, SDDC and SSE rollout 22 sites. 50% reduction in security zones, 25% increased app performance and centralized policy control

SDLAN, SDDC, SASE, CISCO

DXC Signal Private Wireless for US Oil & Energy Major

- Transition from WLAN to Nokia pLTE with increased outdoor coverage and 92% reduction in HW spend by replacing 200 WAPs and enhanced security using NDAC algorithm

pLTE, NOKIA

US based Automobile major

- Consulting and Advisory Services to rollout Fortinet SDWAN and Zscaler for offices and manufacturing plants across US region.

SASE, FORTINET, zscaler

German Bank

- Fortinet SDWAN rollout across 85 sites in Germany.
- Z-scanner rollout across the entire enterprise user community.

SASE, FORTINET, zscaler

US based Defense Group

- VMware SDWAN rollout across 220+ global sites. POC is already completed.

SDWAN, vmware

US based Automobile major

- Consulting and Advisory Services to rollout Fortinet SDWAN and Zscaler for offices and manufacturing plants across US region.

SASE, FORTINET, zscaler

DXC Secure Network Fabric for DXC DCs

- Transformation traditional DC to SDDC technology leveraging Aruba CX10k switches, Aruba Fabric Composer and Pensando Security & Service Manager. 83% reduction of security infrastructure footprint, 50% reduction in operational efforts and centralized policy orchestration and increased security posture

SDDC, HPE, aruba networking

Energy NW Assessment & SASE Transformation

- Fortinet SDWAN rollout across 150+ sites in Europe. SSE ZIA Zscaler rollout across the entire enterprise user community. 30% costing savings in transport and optimized SDWAN design, 40% increased application performance and improved visibility, orchestration and security posture.

Advisory, SASE, FORTINET, zscaler

NW Assessment and (w)LAN Refresh for large Global Software Producer

- Consulting & Advisory - EoX Assessment and HW refresh program, site survey, design and AI driven deployment for 42 sites aligned to customer vision based on Aruba vLAN+Clearpass solution with UX1 sensors for telemetry data analytics

Advisory, WLAN, NAC, HPE, aruba networking

EU based Government institution

- Cisco based SDWAN and SDA rollout across EU sites.

SDLAN, SDWAN, CISCO

European Utilities major

- Fortinet SDWAN rollout across 200+ sites in Europe.
- Z-scanner rollout across the entire enterprise user community.

SASE, FORTINET, zscaler

European Health Tech major

- DXC has bid for Managed SASE services to take over Cisco SDWAN, Cisco Umbrella and Zscaler services covering 400+ sites and 70K+ users.

SASE, CISCO, zscaler

70% Reduction in MPLS footprint by transitioning to Local internet breakouts and enhanced user experience for cloud application access.

25% Reduction in the monthly transport cost by retiring the MPLS connectivity and leveraging the Internet.

Centralized Deployment and Policy Management
Zero Touch provisioning and using centralized Orchestrator for policy push and management.

Security Enhancement
Enabling next-gen security feature set on sites and retiring the legacy ACLs thereby resulting in enhanced security and effective management.

Network relevancy across the industry landscape

Trends

- Oil and Gas companies need to embrace agility and work towards digital transformation of their operations and culture. Next-generation global network capabilities are required to achieve energy trends
- Digital trust, cybersecurity, reliable performance of assets will be the key to ensure efficient and safe operations
- Consumerization of technology: affordable mobile devices, pre-configured app-style cloud solutions, IoT and social networks drive speed, collaboration and efficiency

Hot opportunity areas

- Solutions that provide convenient, on-demand, network access to shared pool of configurable computing resources (e.g. networks, servers, storage, applications, IoT and services)
- According to a survey of global Oil and Gas CIOs, 72% of companies are investing in mobility solutions and 90% of companies believe that leveraging mobile/LTE technologies will enhance business efficiencies

Customer case study

NW Assessment & SASE Transformation for EMEA Energy client

SDWAN+SSE Transformation
150+ client sites in EMEA region

Client partnered with DXC to evaluate their traditional hub-spoke WAN network and transform it to highly secure SDWAN solution integrated with Internet Access Protection (ZIA) optimizing costs and performance

Trends

- 80 million millennial consumers to spend \$65 billion on consumer-packaged goods in the next decade
- CPG companies that inject Big Data into their operations outperform peers by 5-6% in productivity and profitability
- Digital™ is transforming the consumer relationship– 46% of smartphone owners use them for in-store research

Hot opportunity areas

- The CPG industry is impacted by technological changes that influence the way consumers interact with each other and with brands. Major technologies include Internet of Things, Mobility and App Ecosystems, Big Data and Analytics and Social Media
- Smart devices, technologies and services, are creating new opportunities to extract value from data

Customer case study

WAN Modernization for Global Retail Client

Refreshing EOX hardware and optimizing the MPLS WAN

Client had intent to modernize WAN for enhancing performance and save costs and thus partnered with DXC to achieve these goals

70% reduction in MPLS footprint, 25% reduction in monthly Transport costs, leveraging internet, centralized policy management, enhanced security and optimized end-user experience in OS365 application access

Trends

- Digitalization: digital capabilities are a growing business priority driving IT spending
- Migration and replacement of legacy core systems, especially in claims management
- Mobility is a leading priority for insurers. Mobile solution areas such mobile device management and real time IoT car monitoring systems are expected to grow strongly
- Online/web channels and CRM investments required to improve customer self-service

Hot opportunity areas

- Expected to produce better, cheaper, customized products, faster service, improved customer experience, optimization of customer, agent and broker channels
- Improve customer responsiveness, act as a service differentiator
- Make new product releases more agile and flexible and improve control and security
- Deploy an effective multi-channel distribution strategy to attract younger customers and retain existing ones, also deliver a relevant and differentiating customer experience

Customer case study

LAN Campus Network Transformation

Build Highly resilient network and integrate with existing network

Client partnered with DXC to evaluate their existing Campus LAN network and transform it from GPON legacy technology to New highly reliant IP Network

Network relevancy across the industry landscape

Trends

- IoT is transforming the Trucking Industry to cut costs and increase efficiency
- Predictive Analytics used to improve safety and operations
- Cloud computing rapidly maturing to support transportation management solutions

Hot opportunity areas

- Real-time view of docks/yard activities optimizing door, bay and yard locations and moves via IoT connected platforms
- Analyze business processes, data flow and technology. Business needs and value/technology assessment and architecture re-design
- Central system includes tools and generation of customer reports as needed for more detailed analysis of network infrastructure information

Customer case study

SDLAN Rollout for Major Transport

Enhanced security with realization of Zero Trust Framework

Client partnered with DXC to rollout and manage Cisco SDLAN including POC.

50% reduction in virtual network security zones, 25% improved insights in application performance, centralized policy management optimizing operations, enhanced event management

Trends

- New sources of value are opening up around vehicles as they become connected and offer more digital products
- Changes to where and how vehicles are produced will continue as a result of shifting macroeconomic trends, simplifying the supply chain and production process and reducing product fragmentation
- Social technologies and new distribution models have brought customers much closer to the automotive manufacturer than ever before

Hot opportunity areas

- Solutions that help support the opportunities created as vehicles become connected devices in a broader ecosystem; especially related to understanding and improving the end-user experience through IoT-based edge-related technologies
- All core manufacturing and supply chain-related activities that are the heart and soul of companies that build complex end products
- Capabilities that address digital weaknesses across the entire spectrum of IT products/services from server to end-point device

Customer case study

Greenfield Data Center Design for Auto Major

Cost-effective data center design with integration to cloud IaaS

Client partnered with DXC to assess the existing data center infrastructure and to design, build and operate a cost-effective futuristic data center solution.

\$10M TCO saving, 100% resiliency and application availability, improved data security and higher scalability with reduced security attack surface

Trends

- As the industry struggles with revenue growth, stricter regulations, tech-savvy consumers and non-banks, it relies even more on technology in all areas
- Advances in cloud, mobile platforms and application development are lowering or eliminating technological and cost barriers
- Smarter banking through cognitive computing and artificial intelligence is helping customers and employees make better and faster decisions

Hot opportunity areas

- Customer centricity requires integrating supporting technologies such as converged hybrid infrastructure, cloud broker, applications transformation, IoT and managed security offerings such as global incident management response
- Revenue and profit generation goals require banks to expand global capabilities and consolidate payment systems
- Risk management and compliance mandates require technologies such as catalog/identity management, content management, device management, and banking/wealth management applications

Customer case study

APAC Financial Major

Aruba SDWAN rollout across 10 sites in Australia

70% reduction in MPLS footprint using local internet breakouts

25% reduction in monthly transport costs by retiring MPLS connectivity, Centralized deployment and Policy Management. Security footprint optimized

DXC Network – Key Contacts

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