IDC MarketScape

IDC MarketScape: Worldwide Network Consulting Services 2017 Vendor Assessment

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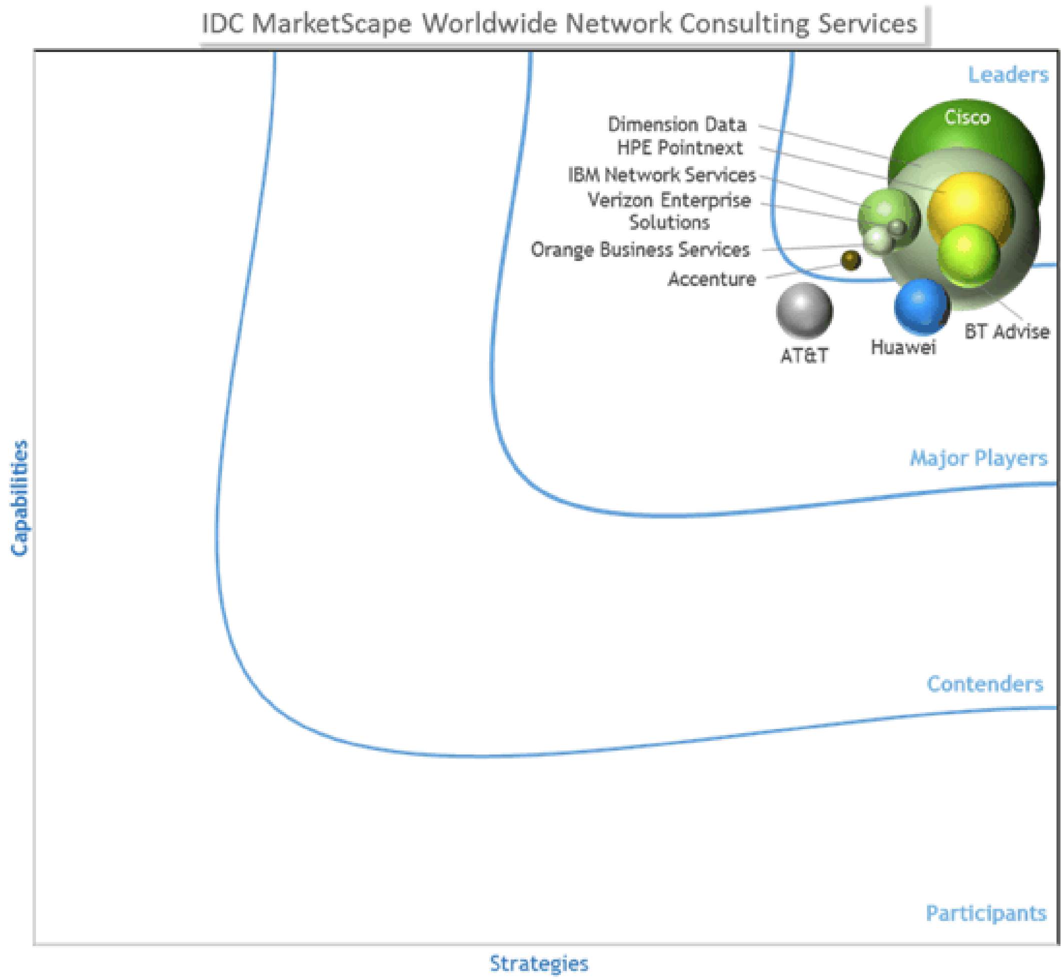
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Network Consulting Services Vendor Assessment



Source: IDC, 2017

June 2017, IDC #US41623217

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

This IDC study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's current and future success in the marketplace. This study assesses the capability and strategy of many prominent network consulting firms. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing network consulting services during both the short term and the long term. In this study, IDC has given additional weighting for the vendors' future view and strategic direction. Network consulting services is an evolving market, and the reader will find it valuable to understand where the participants are heading directionally. As one would expect of market leaders, overall, the participant firms performed very well on this assessment as global services firms that have been selected because they met the required criteria.

A key worldwide finding is that network consulting providers are generally quite capable with the delivery of critical capabilities by providing the required spectrum of consulting services, leveraging resources appropriately, and integrating processes and toolsets into the engagement. They are also investing in tools and technologies to help clients identify and implement options for growth, expand into new markets/geographies, and innovate around the network for greater efficiency, competitive advantage, and business models. Another key finding is that according to this evaluation, generally, network consulting providers have work to do to strengthen their ability to have consistent global knowledge transfer and exchange — an essential component of many projects. The participants were also evolving the way they commercially engage with clients, by offering a broader spectrum of consumption, payment, and risk sharing options based on customer needs and business requirements. This IDC study highlights where the network consulting market is moving directionally, how the participants are developing offers and processes to meet their customers' needs for differentiation and competitive advantage, and the investments participants are making to ensure efficient and successful delivery of network consulting services. IDC examined the participants' capabilities and strategies for helping their customers transform their networks as well as their businesses, technology, and operational processes, which are underpinned by the strength of their network and being transformed by their network. Key themes demonstrated by leaders in this study are as follows:

- Offer breadth and depth
- Ability to deliver on a global scale
- Defined and repeatable methodology
- Strategically hiring, reskilling, and training talent
- Investment in automation and tools for efficient service delivery
- Helping customers succeed with technology, operational, and business outcomes

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape includes analysis of worldwide network consulting firms, those with broad portfolios spanning IDC's network consulting services research coverage with global or regional importance. This assessment is designed to evaluate the characteristics of each firm — not solely the size or the breadth of services. It is conceivable, and in fact the case, that small focused firms can compete with larger firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

ADVICE FOR TECHNOLOGY BUYERS

Networking, IT, and business requirements demand solutions that work holistically within an enterprise. These solutions are often complex and will require input from a broad spectrum of domains and stakeholders throughout the enterprise. Thus network consulting projects are often complex, transformative, and differentiated. To maximize value and minimize disruption as an enterprise moves through a network transformation project, enterprise decision makers must:

- Ensure a services firm can strategically prioritize networking, operational, and business requirements.
- Bring together disparate stakeholders and influencers to ensure a linkage between the business and the technology.
- Deliver the project in a globally consistent manner in a variety of consumption and payment models.
- Define and deliver repeatable methodologies for technology, operational, and business change.
- Articulate investments in new technologies, processes, and tools for efficient, secure, and intelligent service delivery.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Accenture

According to IDC analysis and customer feedback, Accenture is a Leader worldwide in this IDC MarketScape.

Accenture is a global management consulting, technology services, and outsourcing company incorporated in Dublin, Ireland. Its clients are Global 2000 companies, which are Accenture's target market. The network practice includes more than 1,200 consultants and 8 delivery centers located in Europe, Asia, and the United States. To enable innovation, the company has created Accenture Innovation Centers (front-office capabilities), Accenture Studios (digital infrastructure), Accenture Labs (research), and Accenture Ventures and Accenture Research (emerging opportunities such as artificial intelligence [AI]).

Accenture's offerings encompass assessment and strategy, design, implementation, and operational support. The offerings are organized around cloud networking, advanced wireless and IoT, collaboration, and security technologies, and they reflect five priorities: rethinking and simplifying network architecture, which Accenture accomplishes with virtualization and software-defined networking (SDN); SD-WAN options to connect to private and public cloud; wireless technologies;

embedded security; and a modular approach. The technologies that enable these priorities are incorporated into a new internal architecture that provides a "blueprint" for client engagements. Accenture's network services are developed entirely with its own intellectual property (IP).

To deliver services efficiently, the company has developed tools and analytics for network assessment; automation for its transformation/migration factory; and for operations, its network overhaul and service management tools. In addition, Accenture has invested in strategic partnerships with carriers, network equipment providers, and third-party service providers. Accenture's services fit within its network-as-a-service offering, which is designed to help customers move from a product foundation to a platform strategy.

Strengths

Among network consulting services firms worldwide, Accenture is considered by buyers as doing extremely well at helping clients with improving operational efficiencies, increasing competitive advantage, and assisting with digital transformation projects. Clients view Accenture as a service provider that delivers a solid understanding of its client's business needs and requirements, and more importantly, Accenture has the capability to become deeply integrated with its customer's environment and become an extended part of the team, consistently sharing knowledge and best practices to help maximize investments.

"They have a professional approach and set procedures," states one professional services end user, and "They are a company that delivers reliable services," states another client. Others from the IDC end-user survey call Accenture "professional," "quality," and "reliable."

Challenges

On the other hand, Accenture should aim to improve its capabilities for measuring customer satisfaction as well as articulating the investments it is making in R&D, particularly in areas surrounding automation and tools.

AT&T

According to IDC analysis and customer feedback, AT&T is a Major Player worldwide in this IDC MarketScape.

AT&T is a Texas-based multinational telecommunications company. Its network is the core of its value proposition; accordingly, it has invested billions of dollars in evolving its wired and wireless solutions as well as, most recently, undergoing its own major transformation initiative of enhancing its customer-facing services to become enabled by software-defined networking technologies and utilizing network functions virtualization to enhance and change the way its customers will fundamentally do business. To accomplish this goal, AT&T Consulting along with AT&T Network Integration (NI) played a significant role in the success of this transformational initiative and are part of the AT&T Business Solutions and International organization. Thus AT&T Consulting along with AT&T NI share this experience and learning with their enterprise customers to help them with their own complex transformation initiatives.

In addition, AT&T helps its customers evolve their global networks (making customers' networks more efficient, quicker to deploy, and adapt to changes), transforming their unified communications (UC) infrastructures (helping customers transition from TDM or premise-based IPT infrastructures to cloud-based solutions meeting business needs) and developing and deploying IoT solutions to help customers offer new services and optimize business operations.

AT&T capitalizes on its own intellectual reservoirs with a "reach back" into AT&T Labs, AT&T Research, Foundry, and Domain 2.0 organizations, which can incorporate and commercialize research into proven and repeatable methodologies and frameworks for AT&T Consulting to share with its enterprise customers. Examples of how AT&T is leveraging its Labs is with machine learning (ML) and modeling for visual network analytics capabilities as well as call abandons using patterns and algorithms to address operational issues. In addition, AT&T is notable for creating a group of principal architects who are ex-corporate vice presidents and CIOs. These Principal Architects, embedded within the account teams, can conduct peer-to-peer discussions with customers and prospects, and they can pull in relevant AT&T resources and expertise as needed.

AT&T continually trains and reskills its consulting and NI teams, especially considering new and disruptive technology developments such as software defined, with the development of a "path to 2020" to ensure consistency and relevancy. AT&T incentivizes its engineers to continually upskill by leveraging its technology partners, new content through T- University, and virtual simulators for best-of-breed training.

Strengths

Worldwide, buyers of AT&T network consulting services regard the company as delivering increased profitability as well as improved network security around the solutions that it delivers to enterprise customers. One end user states, "Their transformation worked well," and other IDC study end users say that AT&T is "adaptable," "flexible," and "efficient."

AT&T leverages its strong partnerships with a broad spectrum of partners to bring best-of-breed solutions to market, which utilizes a standardized and regimented approach for onboarding new technology partners and incorporates this IP into the AT&T platform for speed for customer engagement.

Challenges

To further advance AT&T's perception among buyers, the company should increase its messaging to support its network consulting capabilities and innovation worldwide, particularly in regions where the company is growing a new presence, such as LATAM. This will increase customer stickiness as well as mindshare with enterprise customers.

BT Advise

According to IDC analysis and customer feedback, BT Advise is a Leader worldwide in this IDC MarketScape.

BT, whose headquarters are in the United Kingdom, is a multinational communications services company providing networked IT solutions globally. BT Advise, which resides within BT's Global Services division, is the professional services organization that encompasses Advise Connect (network consulting services and 600 network consultants). The company offers global capabilities delivered by local experts in local dialects to meet specific customer needs, which are augmented by tools and technology. BT supports Advise personnel with a multifaceted knowledge center that offers talks, technology calls, meetings with subject matter experts, and a training academy. Further, BT continues to invest substantially in training its salespeople so they are knowledgeable and accredited across the entire portfolio.

BT Advise supports all global services go-to-market approach across all target customers; cloud of clouds portfolio strategy, including network services (BT Advise Connect); and digital transformation services across in three areas: digital customers (contact services), the digital business (networking, hosting, and cloud), and digital employees (unified communications and collaboration). BT Advise assists customers with strategy for their digital journey across cloud adoption, network innovation, and process refinement. Specifically, BT Advise Connect supports the infrastructure/network elements of Cloud of Clouds portfolio strategy. Underpinning BT's cloud approach is BT's investments in its evolving network capabilities with Dynamic Network Services, through which the incorporation of SDN, NFV, and SD-WAN technologies change how services are delivered to the customers, and network service integration strategies, which consultants apply in situations where customers want to manage multiple vendors using an ITIL service management approach.

The repeatable, life cycle Discover-Transform-Manage methodology is used for all BT Advise engagements. Discover includes diagnosis, analysis, and recommendation phases, which provides various types of assessments across people, process, and technologies such as network infrastructure and SD-WAN. Transform consists of design, planning, and migration as well as building the business case and end-user technology adoption. Manage relates to the provision of managed services focusing on specific customer needs, including design, optimization services, and comprehensive analytics for continued optimized performance. Security consulting runs horizontally across all offers. The Discover-Transform-Manage methodology is used by BT Advise for staging a customer's transformation journey and evolving the focus from simply building networks to holistically connecting services. BT Advise helps customers assess their readiness for cloud, networking, and value-added services and helps determine the best deployment strategy to achieve their target outcomes. As the market moves to NFV/SDN and customers increasingly embrace digital transformation, BT Advise has developed a set of digital consulting offers to support customers in this new hybrid world, underpinned by its global portfolio of services fueled by its Dynamic Network Services.

Strengths

BT Advise shows its strengths in its ability to increase operational and employee efficiencies and reduce the time to market for new services. As one oil and gas customer states, "BT Advise brings the right people at the right time; they are willing to work with us financially and have skin in the game. They are willing to be a partner."

Other end users state, "offers great value for the money," "they helped enhance our workplace," and "reliable."

Challenges

To advance further in buyer's opinion, BT Advise can continue to refine its measurement tools and engagement activities for customer satisfaction and retention.

Cisco

According to IDC analysis and customer feedback, Cisco is a Leader worldwide in this IDC MarketScape.

Cisco Systems Inc. is based in San Jose, California, and operates globally. Growth and innovation are fueled by an aggressive acquisition strategy and organically through initiatives such as the Research Center, which supports R&D through collaboration with universities, and the Entrepreneurs in Residence incubator program.

The Cisco Services organization provides a life cycle of IT services — advisory, implementation, optimization, training, managed, and technical services — across key and emerging industries including networking, datacenter, collaboration, cloud, security, and IoT. Further, Cisco continually innovates to improve its services using emerging technologies such as cognitive, machine learning, big data, business intelligence, and data visualization.

To deliver Advisory Services in an ecosystem approach, Cisco uses two frameworks: Cisco DNA 8 and Cisco Domain Ten 8. The new DNA 8 framework aligns with the Digital Network Architecture (DNA) a secure, automated, open, and software-driven architecture. This framework identifies eight areas customers should address during network transformation and maps each area to expected improvements. Consultants use DNA 8 to define current- and future-state models, feed strategic planning, and simplify stakeholder discussions. The established Domain Ten framework addresses datacenter and cloud network architectures and IT infrastructure and how they work together. Both frameworks reflect significant investments in automation, analytics, and security capabilities, and both were designed to specifically address customer security, operations, governance, and organization challenges as they adopt new technologies and architectures.

While Cisco has automated much of its services delivery, the company believes it provides higher value to customers with a "human in the loop" to interpret the information and build knowledge. In addition, Cisco has digitized intellectual property gathered from more than 30 years' experience helping customers design, build, deploy, and run the world's largest networks. The company is turning that IP into tools and automation.

Strengths

Worldwide, buyers of network consulting services regard Cisco Services as strong at delivering operational efficiencies and improved network security. In addition, Cisco was rated as one of the strongest vendors in its ability to partner, encompassing a broad spectrum of partner types — including ISVs and technology and channel partners — to expand its reach and capabilities. A Cisco hospitality customer states, "Cisco has a pool of very knowledgeable engineers who were able to listen to our requirements and deploy a solution that met our goals."

Furthermore, end users state, "We have been a customer of Cisco for nearly 15 years and feel that they understand and value our business," "the customer service, products, and services are top notch," and "Cisco Services provides intelligent network services supplement to IT."

Challenges

To further advance Cisco's perception among buyers, Cisco can more clearly articulate its investment in advanced tools and technologies, by highlighting its advancements in automation and how that will improve the service delivery experience. End users state Cisco "can improve their timing for service delivery."

Dimension Data

According to IDC analysis and customer feedback, Dimension Data is a Leader worldwide in this IDC MarketScape.

Dimension Data, is a subsidiary of the NTT Group, has offices in 49 countries, and serves clients in more than 100 countries with the help of partners. Dimension Data's network consulting services strategy is built around the goal of becoming an ICT Level 4 outcome-based provider. To that end, reskilling employees is well under way.

The company's "networking as the platform" go-to-market model is organized into three tiers. First, Technology towers, the foundational tier, includes network as the platform, customer experience (CX) and collaboration, end-user computing, next-gen datacenter, digital, and security. Second, Services, the strategic tier, includes consulting services, support services, and managed services. Third, Deployment model, the top tier, spans on-premises, private cloud, public cloud, and hybrid cloud. Delivery across any infrastructure – wired/wireless, hybrid WAN, and datacenter network – is central to Dimension Data's model.

The network consulting services portfolio includes transformation consulting and architecture consulting. Transformation consulting consists of advisory services related to strategy/road maps, adoption planning, and business case planning. Architecture consulting spans technology, such as network as the platform, communications, security, next-generation datacenter, and end-user computing, and platform services, such as support, managed, and IT as a service.

Dimension Data is investing in emerging technologies to support its outcome-based focus. It's using the IoT World Forum matrix, for example, to compare and align its IoT capabilities. And, it's applying machine learning to the services data it collects to enable consultants to provide customers with data-based recommendations.

Strengths

Worldwide, Dimension Data is rated quite highly due to delivery operational efficiencies. Supporting that, Dimension Data has invested in and can articulate its adoption and utilization of automation to streamline its service delivery processes. As one manufacturing client states, "Dimension Data delivers high quality coupled with intelligence of operations in its services."

Other end users state, "agile," "ease of doing business," and "reliable."

Challenges

To advance further in the buyer's opinion, Dimension Data can continue to refine its measurement of technology, operational, and business outcomes as well as expand its external messaging on how its investments in automation are creating cost efficiencies for customers.

HPE Pointnext

According to IDC analysis and customer feedback, Hewlett Packard Enterprise (HPE) Pointnext is a Leader worldwide in this IDC MarketScape.

In 2016, HPE relaunched its technology services organization, branded as HPE Pointnext. The organization consists of 25,000 IT experts, and a robust partner network, who deliver services in 80 countries. An initial priority has been to simplify the portfolio of offerings, thereby making consumption easier for salespeople, channel partners, and customers. The effort is aided by tools such as the Industry Business Value Framework, which provides vertical industry KPIs, and Intelligent Deployment for Networks, which automates deployment processes.

HPE Pointnext services are available to midsize and large enterprises and fall into three categories: advisory and transformation services, professional services, and operational services for on-premises and cloud, available to anyone contracted with HPE. Network consulting engagements follow a methodology consisting of strategy, assessment, design, integration, and optimization. Strategy workshops are designed to help align the business and IT and answer the "why" of transformation, and follow-on workshops address the "how."

The company's Trusted Network Transformation" (TNT) methodology encompasses two concepts: simplifying hybrid IT and providing "intelligent edge" networking. Hybrid IT engagements focus on platforms, virtualization, application delivery networks, and security. Intelligent edge involves wired and wireless technologies and security for workspaces and public venues. Both concepts are enabled through partnerships. HPE Pointnext is making a substantial investment in keeping its people proficient in multivendor architectures to maintain its ability to integrate into legacy environments. The company recently launched its network-as-a-service offering, which is an element of TNT.

Strengths

Among network consulting firms worldwide HPE Pointnext demonstrates its strength in helping customers develop new growth strategies and revenue streams, maximizing their network investments as well as increasing their business agility. A global banking client states, "HPE provided operational stability and cost reduction, while increasing flexibility. In addition, they maintained communication during the project with various points of contact throughout our organization."

Other study end users state, "our targets were met on time," "reliable," "innovative," and "efficient."

Challenges

On the other hand, HPE Pointnext can enhance buyers' articulation of its investments in automation for cost savings and efficiency. One end user states, "I find their services are of good quality, but they could be quicker to deal with client requests and queries."

Huawei

According to IDC analysis and customer feedback, Huawei is a Major Player worldwide in this IDC MarketScape.

Huawei is a global company with headquarters in Shenzhen, China. It provides products and services to enterprises, carriers, and consumers. The company's solutions include cloud computing, cloud datacenters, software-defined networking, and wireless network. Huawei's background is in the global carrier business, but it began to offer network consulting services approximately six years ago. Enterprise networking solutions include datacenter networks, BYOD/mobile, edge computing/IoT, campus, and cloud/enterprise private network.

Network design consulting services are 100% Huawei's IP, while other offers are predominantly Huawei IP but augmented with partner IP. The company is developing several new design and assessment tools in a new, service-specific R&D department, and many are being integrated into the Turbo platform to speed up service delivery. Huawei is also developing process tools like the

Integrated Service Delivery Platform, which simplifies collaboration with partners. Some tools and services incorporate Huawei's AI and ML, and Huawei is willing to incorporate partners' AI/ML capabilities into its products and services. While most network consulting services are currently delivered by people, Huawei plans to increase the amount of automation.

Huawei's aggressive growth strategy for network consulting services is centered around its Smart Network Operation Services (Smart NOS) and Global Service Centers (GSCs). Smart NOS began as an operational service but continues to evolve to include optimization and preventive services on a subscription basis. Three GSCs will provide remote consulting and operational services. In addition, for customer relevance, Huawei is ramping up vertical industry specialization in government, finance, manufacturing, healthcare, and transportation.

Strengths

Huawei has invested significantly to grow its network consulting business with a keen focus on R&D efforts and global channel expansion. Huawei is rated well by end users for its ability to deliver operational cost reduction as well as improved security. According to an oil and gas customer (a key vertical for Huawei), "Huawei's level of technology expertise met our expectations and understands our industry."

Other study end users state, "reliable," "quality," and "adaptable."

Challenges

Conversely, Huawei can expand its use of automation and intelligence for service delivery. In addition, it can expand its multivendor expertise — as one customer states, "Huawei should know well of other vendors' products not only themselves."

IBM Network Services

According to IDC analysis and customer feedback, IBM Network Services is a Leader worldwide in this IDC MarketScape.

A New York–based multinational technology and consulting business, IBM delivers network consulting services through its Global Technology Services organization. IBM Network Services is organized into four networking areas: campus, cloud and datacenter, wide area, and wireless. A services integrator, IBM takes a vendor-neutral approach and works with a broad ecosystem of technology partners to supply network solutions.

IBM's network service offerings include the following: transforming to a hybrid cloud model with datacenters moving to IBM's Bluemix cloud platform, transforming the traditional networking environment, managed networking services for legacy and software-defined LAN and WAN, moving legacy voice solutions to a cloud SIP-based service, and moving to network-as-a-service delivery model.

Network consulting services are organized into three groups: network transformation, which includes strategy, planning, design, and optimization; strategy and assessment, which includes SDN, NFV, SD-WAN, cloud networking, and IoT; and network analytics and network infrastructure cost optimization. Optimization services focus on performance, security, and capacity, for which customers can participate in "Gainshare." This model compensates IBM based on a customer's cost savings. Certain areas of the portfolio, like IoT and managed services, make use of the AI/ML capabilities of IBM's

Watson and networking partners. Network consulting services, except for network inventory and benchmarking, are developed with IBM IP.

IBM Network Services expects to grow organically as well as by focusing on geographic expansion; key vertical industries; technology skills in areas such as SDN, NFV, and IoT; acquisitions; and new as-a-service delivery models.

Strengths

Study participants cited IBM Network Services' ability to provide operational efficiencies as well as improved network security as a strength. One study end user stated, "IBM was an excellent partner, with their help we increased profitability by 5% by streamlining our network, so it could operate at peak efficiency and securely."

Additional comments from end users include "increased operational efficiency and data integration," "innovative," and "professional."

Challenges

On the other hand, IBM Network Services can increase attention toward its customer satisfaction and retention activities by providing a broader spectrum of outreach and measurement matrix.

Orange Business Services

According to IDC analysis and customer feedback, Orange Business Services (Orange) is a Leader worldwide in this IDC MarketScape.

Orange Business Services, which is based in France, delivers IT and communications services in 220 countries and territories to enterprises, government agencies, and public sector organizations. Building on its historical network focus, Orange fosters innovation through a product factory, a start-up accelerator, a venture capital fund, acquisitions, and other avenues. The Orange Labs and R&D centers conduct research, develop automated tools (some include AI), and provide resources to start-up firms that enter into partnership agreements with Orange Business Services.

Orange approaches digital transformation in three ways: digital inside, which relates to collaborative workspaces; digital outside, which focuses on how organizations interact with their customers; and digital enablers, which drive transformation discussions with customers about connectivity, infrastructure, and security. Network consulting services are part of digital enablers.

Network consulting delivery is organized into audit and strategy, design and transition, expertise, support and coaching, and security. Strategy workshops, advisory consulting, assessments, and implementation/migration activities align with these phases. Orange has 200 business consultants and 300 assessment and solution consultants that are trained and certified on methodologies such as TOGAF and ITIL, along with partner technologies. Investment priorities include a service catalog, an expanded knowledge database for consultants, and skill building in SDN, cloud/OpenStack, cybersecurity, and IoT.

From a go-to-market perspective, Orange has developed industry practices for seven verticals. Network consulting services can be bundled with Orange network products or purchased separately. The company's "build, buy, partner" philosophy enables a flexible approach to developing customer-specific solutions.

Strengths

Orange Business Services strengths highlighted in the IDC end-user study were improved compliance, improved operational efficiency and increased profitability. An Orange manufacturing client states, "Orange is open and transparent, they are flexible and provide a lot of support even on small requests."

Challenges

To improve buyer perception, Orange should amplify its messaging surrounding its investments and R&D in automation, AI, and ML capabilities. In addition, end users feel that Orange could be stronger in the U.S. market, particularly when working with MNC customers.

Verizon Enterprise Solutions

According to IDC analysis and customer feedback, Verizon Enterprise Solutions is a Leader worldwide in this IDC MarketScape.

Based in New York City, Verizon manages more than 4,000 networks in more than 150 countries, runs more than 200 datacenters, and delivers network services globally. The Professional Services organization is home to the network consulting practice and more than 300 consultants who offer network design and architecture services that encompass technologies such as SDN/hybrid, WiFi, and NFV. Virtual network services and SD-WAN-based network as a service are the company's solution foundations. Network consulting offers are developed primarily with Verizon IP, although some involve customization of third-party products.

Verizon starts its network conversations with a customer experience perspective and its "digitally connected enterprise experience" model. The model is built out for customers at the consulting level via "expertise as a service," which comprises digital consulting and advisory services. "Integration as a service" encompasses onboarding, implementation, and integration of various elements such as cloud/IT services, security services, unified communications, and mobility. "Verizon as a service" offers managed services, including managed SD-WAN/WAN/LAN, to address customers' operational and support requirements. Much of what Verizon offers its customers, specifically in relation to SDN, cloud, and IT operations, is built and deployed internally before it goes to market.

Verizon's target audiences span home office, small office/retail, remote/branch offices, enterprises, and multinationals. Channel partners are a key aspect of Verizon's growth, so investments are being made to enhance the partner program and package network consulting offers in ways that make them easier for partners to incorporate into their businesses.

Strengths

According to buyer perception, Verizon is the strongest firm to provide improved risk mitigation and management. It also performed well in regard to its capability to provide speed of deployment on network solutions. End users state the following: "reliable," "good value," and "deliver on time."

Challenges

To improve buyer perception, Verizon can articulate its investments in automation and tools for improved service delivery, cost efficiency, and insight. While Verizon leverages a partnering strategy for service delivery, more can be done to enable partners to bring Verizon solutions to enterprise customers.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Inclusion criteria:

- Significant network consulting revenue
- Global delivery capabilities across North America, EMEA, APAC, and LATAM regions
- Network consulting services surrounding the following solution areas:
  - Mobility/collaboration
  - Datacenter networking
  - SDN-network virtualization
  - SD-WAN and hybrid WAN
  - Cloud
  - Network consulting supporting IoT

Importance of Technology, Operational, and Business Outcomes for End Users

A significant and unique component of this evaluation is the inclusion of the perception of network consulting buyers of key characteristics and capabilities of the evaluated network consulting providers. This insight is captured in a broad-based random global end-user survey of network consulting firm clients and reveals key insights regarding the capabilities of the individual firms. The broad survey also provides key insights into the kinds of issues that enterprises are engaging consultants to help address.

Worldwide network consulting buyers consider improving network security, increasing operational efficiency, and accelerating business agility as among the top network transformation priorities. EMEA sees improving operational efficiency as more important than companies in the Americas and APAC. And companies in the Americas and Asia/Pacific see increasing network security as a higher priority than those in EMEA (see Table 1).

Based on these priorities, enterprise customers worldwide see improving network security and operational efficiency are still core requirements for selecting a network consulting services partner.

TABLE 1

Importance of Business, Operational, and Technology Outcomes (% of Respondents)

	Worldwide	Americas	EMEA	Asia/Pacific
Development of new growth strategies/revenue streams	22.6	25.7	23.1	17.4
Expansion into new markets and/or geographies	21.5	24.8	16.5	19.5
Operational efficiencies	35.6	37.7	43.7	27.4
Digital transformation	29.1	29.0	28.1	29.9
Improved customer experience	23.7	27.7	22.1	18.5
Increased competitive advantage	29.4	30.0	24.1	31.7
Speed of deployment	27.5	31.8	22.4	24.0
Improved network security	35.9	39.2	31.0	33.8
Increased business agility	31.0	32.4	25.5	32.2
Improved employee efficiency	22.6	24.9	17.7	22.1
Operational cost reduction	24.3	24.4	19.0	27.2
Reduced capex	13.9	15.3	16.8	9.9
Increased profitability	27.7	27.9	24.0	29.6
Faster time to market	21.7	28.5	21.5	11.1
Improved risk mitigation and management	24.4	23.9	21.7	26.8
Improved compliance	24.0	28.0	23.1	18.3
Unweighted valid n =	507	257	150	100

Source: IDC's *Network Consulting Survey,* February 2017

Market Definition

Network consulting and integration services (NCIS) are defined as those activities associated with planning, designing, and building local and wide area data networks (commonly known as LANs and WANs), including multiservice, converged wireless, and wireline networks that allow voice, video, and data applications (such as VoIP and unified messaging) to be propagated across a single, common infrastructure. This study specifically focuses on services for the enterprise, as defined in the section that follows.

Enterprise Network Consulting and Integrations Services

The enterprise market consists of public and private organizations that typically procure project-based network consulting and integration services, including design, integration, and optimization services around their corporate voice, data, video, and datacenter infrastructures to serve the needs of their employees. Enterprise IT organizations have historically procured networking solutions (products and services) from one of three sources: network equipment suppliers and their channel partners, systems integrators, and telecom service providers.

And more specifically, this study focuses only on network consulting services and includes the following services activities:

- Strategy workshops
- Network assessment
- Network inventory
- Network design
- Network configuration
- Network security consulting
- Capacity planning
- Network performance analytics
- Network tuning
- Network testing
- Operations assessment
- Needs assessments
- Process improvement
- Benchmarking

Strategies and Capabilities Criteria

The importance of a firm's characteristics to project success and relevance of the particular issue combined with IDC's opinion about the impact those elements have on the selection of firms implies a unique weighting of these elements when evaluating a firm's overall strategy and capability to address market opportunity and realizing market success (see Tables 2 and 3).

TABLE 2

Key Strategy Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
Functionality or offering strategy	Offering/portfolio investments	Excellence is reflected in plans to expand and refine offerings, resources, and expertise in the network consulting practice.	4.0
	Investment in advanced services	Superior road maps include investments in SDN, SD-WAN, and IoT, preferably with a full life-cycle approach.	5.0
	Development of framework	Vendor methodology is clearly defined and repeatable *and* continually refined to meet customer requirements to support consistent delivery of network consulting services.	3.0
Delivery model	Automation investment	Vendors plan to automate tools and service delivery as a way to manage costs and accelerate service delivery.	5.0
	Delivery scope	Vendors plan to deliver services globally.	4.0
	Own IP versus partner IP	Vendor plans to strategically partner to expand its partner ecosystem to enhance and/or augment its services offers.	4.0
Cost management	Tools and techniques	Vendors plan to use multiple tools to facilitate adoption of network consulting services, help clients justify expenditures, and manage costs.	5.0
	Automated service delivery	To manage costs and be competitive in the marketplace, vendors plan to utilize automated delivery and artificial intelligence/machine learning across their offerings.	5.0
	Automation via AI/ML investment	Vendors plan to invest in AI/ML to increase automation across their offerings.	5.0
Portfolio strategy	Complementary consulting	Vendors plan to offer a range of complementary consulting services to ensure that customers receive the most value from their investments.	3.0

TABLE 2

Key Strategy Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
	Measurement of outcomes	Vendors plan to measure business and operational outcomes to demonstrate efficiency and effectiveness as well as customer value.	4.0
Pricing model	Varied pricing models	Vendors plan to offer multiple pricing models to align with customers' preferences and market direction.	4.0
Sales/distribution strategy	Types of partners	Sales/distribution strategy will leverage varied types of partners to serve markets or industries.	4.0
	Partnering strategy	Vendors plan to leverage partners to maximize the sales and distribution of network consulting services.	3.0
Marketing strategy	Marketing messages	Vendors can articulate and demonstrate clear go-to-market messaging.	5.0
	Marketing tools	Vendors employ diverse marketing tools to raise market awareness and attract/engage customers.	3.0
Customer service strategy	Measurement of customer satisfaction	Vendors plan to focus on ways to measure customer satisfaction.	4.0
	Customer retention activities	Vendors plan to focus on ways to increase customer retention.	4.0
	Incorporation of customer feedback	Vendors plan to leverage customer feedback to improve service delivery.	3.0
Growth strategy	Market expansion	Vendors plan to maximize growth opportunities with plans to expand geographically, vertically, organically, and so forth and in alignment with market trends.	3.0
Innovation/R&D	Innovation activities	Vendors plan to invest in R&D and innovation activities to attain and maintain competitiveness.	5.0
	Investment in R&D	Vendors plan to invest in diverse R&D areas so that they are able to bring innovation to market and demonstrate ROI.	5.0

TABLE 2

Key Strategy Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
Employee strategy	Attracting, hiring, and retaining consulting talent	Vendors plan to have a clear, detailed strategy for attracting, hiring, skilling, and retaining talent.	5.0
	Achievement of global knowledge exchange	The ability to share knowledge globally is a key element of consistent global service delivery.	5.0
Total			100.0

Source: IDC, 2017

TABLE 3

Key Capability Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
Functionality/offering delivered	Depth and breadth of portfolio	The ideal portfolio of offerings includes solutions along the full life cycle of network consulting services.	4.0
	Delivery on outcomes	Vendors achieve outcomes (ideally measurable) for customers that encompass business, operational, and technical.	3.0
Delivery model	Methodology	The ideal delivery methodology encompasses elements such as automation, tools, experience, best practices, AI/ML, consistency/repeatability, and superior change management.	5.0
	Expertise	Vendor expertise encompasses elements such as understanding of business, technology, and operational requirements; industry-specific knowledge; best practices; knowledge transfer; technology agnosticism.	5.0
	Execution	Superior execution is described as on time, on budget, meets promises, and maximizes value.	5.0

TABLE 3

Key Capability Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
	Pre-engagement	Vendors are able to meet customer expectations for timing, pricing, and decision-making capabilities. Vendor coordinates appropriate stakeholders and understands business and technology requirements and meets pricing, scope, and timing expectations.	3.0
Cost competitiveness	Tools and techniques	Vendors use tools to assure their pricing is competitive and flexible to meet customer requirements.	4.0
	Tools effectiveness	Vendor tools that are used to assure competitive pricing and customer decision support are effective.	4.0
	Automation for cost competitiveness	Vendors are investing in AI/ML to increase automation across their offerings.	4.0
Portfolio benefits delivered	Complementary consulting	Complementary consulting services deliver value to customers.	3.0
	Measurement of outcomes	Vendors measure business and operational outcomes to demonstrate efficiency and effectiveness as well as customer value.	3.0
Pricing models	Varied pricing models	Vendors offer pricing models that align with customers' preferences and market direction.	4.0
	Proposal pricing model expectations	Vendors' pricing models meet customer expectations.	5.0
Sales/distribution	Types of partners	Sales/distribution strategy leverages varied types of partners for service delivery to serve markets or industries.	3.0
	Channel/partner enablement	Vendors leverage multiple types of partners to maximize sales opportunities and geographic/vertical reach of network consulting services.	2.0
Marketing	Go-to-market messages	Vendor clearly articulates value proposition across technology, operations, and business benefits/outcomes.	5.0
	Tools	Vendor effectively uses varied marketing tools and techniques.	3.0

TABLE 3

Key Capability Measures for Success: Worldwide Network Consulting Services

Criteria	Scoring Element	Definition	Weight (%)
Customer service capabilities	Customer satisfaction	Vendor uses varied methods to measure and deliver customer satisfaction/service.	4.0
	Communication	Vendor consistently and effectively communicates with customers throughout the engagement process.	3.0
	Retention	Vendor provides continuous outreach through a broad variety of methods.	4.0
Innovation/R&D	Activities	Vendors invest in R&D and innovation activities to attain and maintain competitiveness.	3.0
	R&D investments	Vendor invests in diverse R&D areas to bring innovation to market and demonstrate ROI.	4.0
Employee strategy	Attracting, hiring, and retaining consulting talent	Vendors can articulate a clear, detailed strategy for attracting, hiring, skilling, and retaining talent.	4.0
	Knowledge transfer	Vendor achieves globally consistent knowledge exchange/transfer.	3.0
Other business	Quality of services	Vendors meet customer expectations for overall quality of services.	5.0
	Overall capabilities	Vendors meet customer expectations for overall capabilities.	5.0
Total			100.0

Source: IDC, 2017

LEARN MORE

Related Research

- *Software-Defined Networking Requires Services-Defined Professional Services – Services Observations from the IDC SDN Survey* (IDC #254697, March 2015)
- *IDC's Worldwide Services Taxonomy, 2015* (IDC #254824, March 2015)
- *Worldwide and U.S. Enterprise Mobility Network Consulting and Integration Services 2014-2018 Forecast* (IDC #251200, September 2014)

- *Worldwide and U.S. Enterprise Network Consulting and Integration Services 2014-2018 Forecast* (IDC #248685, May 2014)
- *Evolution of Network Consulting and Integration Strategies in the 3rd Platform Version 2* (IDC #247816, April 2014)
- *Worldwide Enterprise Communications and Datacenter Networks 2014 Top 10 Predictions* (IDC #246585, February 2014)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of several providers participating in the worldwide network consulting services market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in each market during both the short term and the long term.

"While the participants in this study are highly capable of delivering network consulting services, the study aims to differentiate those consulting firms that are investing to be ahead of the market and meeting customers' needs. This requires a strategic road map for helping enterprise customers innovate, differentiate, and compete on technology, innovation, and business playing fields. To do this successfully, network consulting firms must have the right mix of people, process, and technology to meet the demand," said Leslie Rosenberg, research director, Network Life-Cycle Services.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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