



IDC MarketScape

IDC MarketScape: Worldwide Network Consulting Services 2017 Vendor Assessment

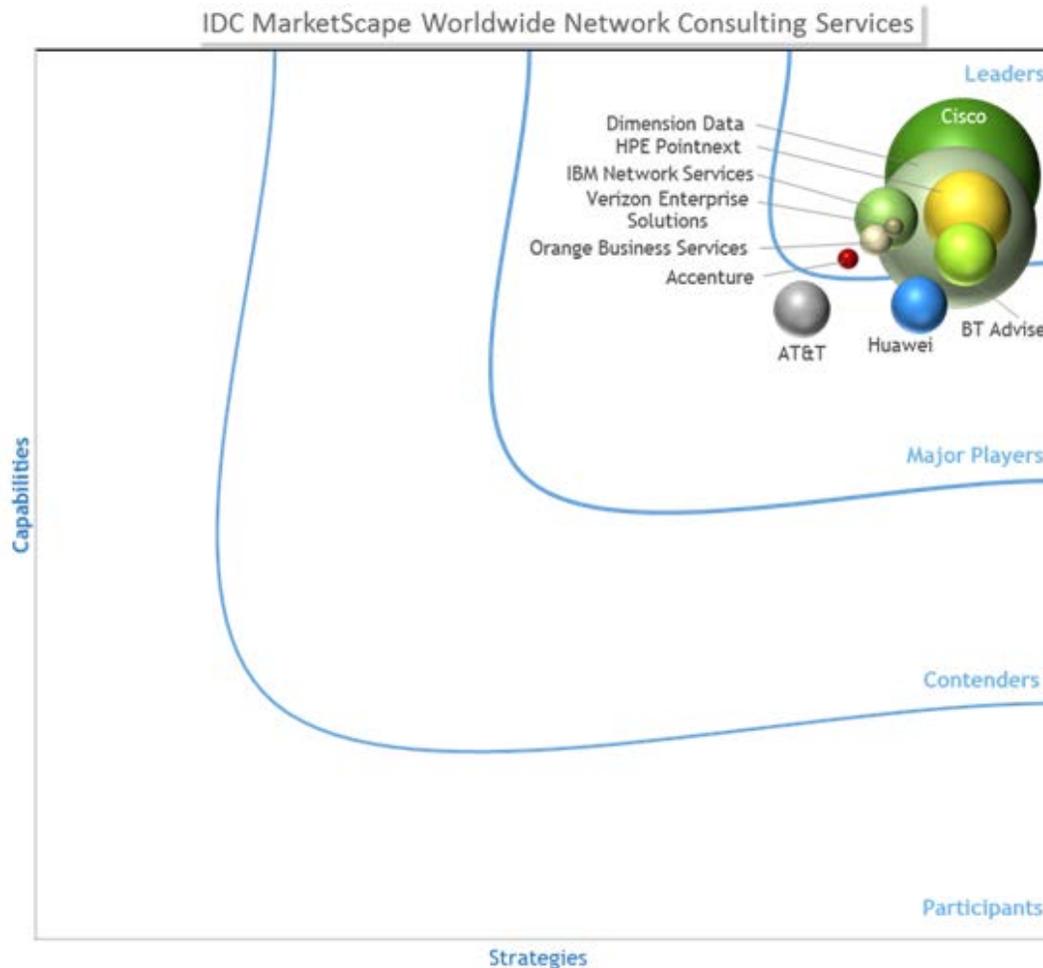
Leslie Rosenberg

THIS IDC MARKETSCAPE EXCERPT FEATURES: IBM NETWORK SERVICES

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Network Consulting Services Vendor Assessment



Source: IDC, 2017

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Network Consulting Services 2017 Vendor Assessment (Doc # US41623217). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

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 MARKETSCOPE VENDOR INCLUSION CRITERIA

This IDC MarketScope 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 MarketScope. 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.

IBM Network Services

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

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.

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

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.

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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