IDC MarketScape

IDC MarketScape: Worldwide Network Consulting Services 2019 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES CISCO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Network Consulting Services Vendor Assessment

Source: IDC, 2019

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

This IDC study represents the vendor assessment model called an 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 IDC study assesses the capabilities and strategies 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 in both the short term and the long term. In this study, IDC has given additional weighting for the vendor's future view and strategic direction. Network consulting services are 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 the services firms globally that have met the defined criteria have been selected because they have met the required criteria.

Once again, 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

Key findings include:

- There is a significant investment in tools, automation, platforms, and technologies for efficient, intelligent, and value-added service delivery globally coupled with local touch
- Participants continue to be challenged to find, enable, and retain the right talent for consulting-led engagements, but have built mechanisms and programs to address this issue.
- Study participants continue to invest in technology expertise, along with partner ecosystem expansion for network innovation and certifications.
- Development of new offers is based on customer requirements for solving current and future business, technology, and operational challenges.
- End users in this study state they want to see a tighter link or more closed loop accountability between up-front consulting and project delivery for greater customer satisfaction.
- End users state that overall capabilities still matter. They view their partners holistically across business, technology, and operational expertise.
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.

Vendors were included in this research if they met the following criteria:

- Network consulting revenue of $25 million or more
- Global delivery capabilities across North America (NA); Europe, the Middle East, and Africa (EMEA); Asia/Pacific (APAC); and Latin America (LATAM) regions
- Network consulting services surrounding the following solution areas:
  - Mobility
  - Video/collaboration/conferencing (UCC)
  - Customer experience solutions including service desk and contact center
  - Datacenter networking
  - SDN/NFV/network virtualization
  - SD-WAN/hybrid WAN/multicloud
- Network consulting services portfolio that spans assessment, design, and continuous improvement

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 and interlink networking, operational, and business requirements.
- Bring together disparate stakeholders and influencers to ensure linkage between the business and the technology.
- Select a partner that can deliver the project in a globally consistent manner that may involve a variety of commercial arrangements and consumption models that are appropriate for each business case and organizational structure.
- The services partner can define and deliver repeatable methodologies for technology, operational, and business outcomes.
- A services firms can illustrate a closed loop feedback cycle between network consulting and project delivery. This study only focuses on network consulting.
A services firm can articulate investments in new technologies, processes, and tools for efficient, secure, and intelligent service delivery.

**VENDOR SUMMARY PROFILE**

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.

**Cisco**

Per IDC analysis and customer feedback, Cisco is positioned as a Leader in this 2019 worldwide IDC MarketScape on network consulting services.

Cisco Systems Inc. is based in San Jose, California, and operates globally. In 2018, Cisco Services undertook a massive internal transformation and combined its legacy services lines – advisory, professional, support, managed, and training services – into one overarching customer (Cisco CX) organization. Not only did Cisco merge the units, but more importantly reinvigorated the guiding philosophy of customer experience (CX) across the portfolio and the company. The goal of the new Cisco CX organization is to help customers choose, adopt, and have a deeper relationship throughout the life cycle of the engagement.

While Cisco is undergoing a philosophical transformation, it remains committed to investing and delivering innovation across its portfolio of offers. Growth and innovation continue to be fueled by an aggressive acquisition strategy and organically through supporting R&D and collaboration with universities and the Entrepreneur-In-Residence incubator program. Cisco CX continually strives to innovate its CX offers with continuous investment for differentiated and competitive offers to help customers drive efficiency and service quality, increase automation, improve operational insight, and enhance security.

Under the Cisco CX umbrella, the organization provides a life cycle of IT services – advisory, implementation, optimization, training, managed, and technical services – across key and emerging networking technologies including networking, datacenter, collaboration, cloud, security, and IoT in lockstep with engineering product teams. Further, Cisco continually innovates to improve its services using emerging technologies such as cognitive, machine learning, automation, and artificial intelligence more broadly across the portfolio. CX aims to build its portfolio around customer requirements while in collaboration with product teams to create services that enhance the technology investments that customers are making.

Cisco CX continues to invest and standardize on two frameworks: Cisco DNA 8 and Cisco Domain Ten. The DNA 8 framework aligns with the Digital Network Architecture (DNA). This framework identifies eight areas customers should address during network transformation and maps each area to expected improvements. The established Domain Ten framework addresses datacenter and cloud network architectures, 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 many aspects of its services delivery, the company believes it provides higher value to customers with its team of over 6,000 global consultants (and partners) to engage with...
clients, provide guidance based on intelligence, 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. Cisco's knowledge base is key differentiator for Cisco CX.

**Strengths**

Worldwide, buyers of network consulting services regard Cisco Services as strong at delivering improved network security, operational efficiencies, and increased speed of deployment. A Cisco customer states, "A true partner, CX is positive development at Cisco: easier to work across all Cisco services groups, has integrated services, alignment is better, and moves faster toward target."

Furthermore, end users from the IDC study state about Cisco "overall the best for business efficiency and customer satisfaction," "Cisco communication makes us much more efficient," and "Quality and excellence is what they deliver."

**Challenges**

To further advance Cisco's perception with buyers, Cisco can more clearly articulate its philosophy of CX and what that means to investment in the portfolio and service delivery. End users state that it "can be expensive but worth the price."

**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 represents 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.

**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 to highlight key characteristics of network consulting capabilities of the evaluated 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. Coupled with this web-based end-user survey is a significant effort to speak live with as many actual customers of the participants as possible.

Worldwide network consulting buyers consider improving network security, increasing operational efficiency, and accelerating digital transformation as among the top network transformation priorities. Regionally, North America and EMEA buyers turn to third-party services firms most often for digital transformation, while in LATAM and APAC, buyers leverage operational efficiency and business agility capabilities, respectively.

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.

**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 these services for the enterprise, as defined in the sections that follow.

**Enterprise Network Consulting and Integration Services**

The enterprise market consists of public and private organizations that typically procure project-based network consulting and integration services (NCIS), 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

**LEARN MORE**

**Related Research**

- *Design Thinking Principles Enhance Enterprise Network Life-Cycle Services* (IDC #US44515818, December 2018)
- *Reimagining CX Opportunities for Network Life-Cycle Services Firms: A New Paradigm to Grow Sales, Services, and Customer Relationships* (IDC #US44433818, November 2018)

**Synopsis**

This IDC study uses the IDC MarketScape model to provide an assessment of several providers participating in the worldwide network consulting services market. 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 in 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, operational, 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 vice president, 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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