

# IDC MarketScape: Worldwide Network Consulting Services 2021 Vendor Assessment

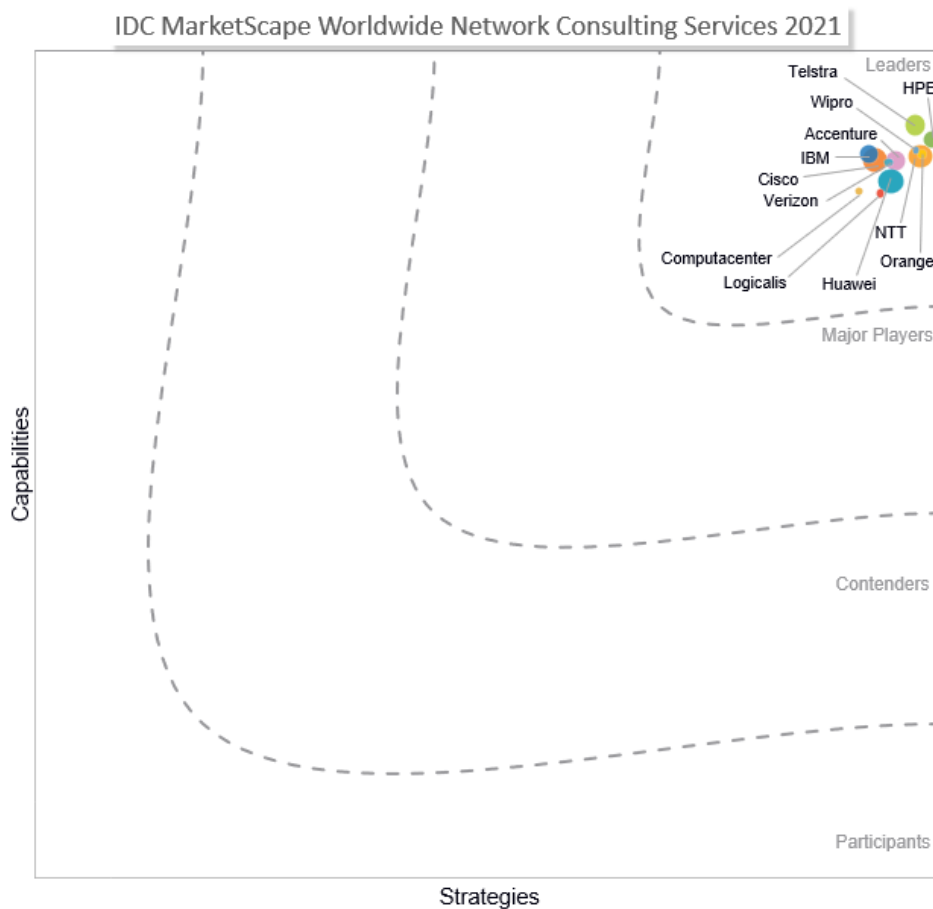
Leslie Rosenberg

THIS IDC MARKETSCAPE EXCERPT FEATURES HPE

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Network Consulting Services Vendor Assessment



Source: IDC, 2021

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Network Consulting Services 2021 Vendor Assessment (Doc # US48076121). 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

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Network consulting services are an evolving market, and the tech buyers will find it valuable to understand where the vendors are heading directionally. As one would expect of market leaders, overall, the participant firms performed very well on this assessment as the services firms have been selected because they have met the required criteria. It is important to understand that while this a mature market, it is also extremely competitive and the vendors continue to invest to provide exceptional technology expertise, tools, and resources for consistency and innovation and consultants to offer strategic guidance to help customers move from their "as is" environment to the new "to be" state as securely and efficiently as possible.

As the networking market continues to evolve – moving from hardware to software and offering new consumption models and even network as a service – network consulting firms will continually refine their offerings to meet customer demand and requirements. The network will continue to be a strategic imperative, underpinning success in collaboration, cloud, 5G/IoT, and business agility. As such, participants in this market understand the importance the network plays in their customers' business objectives and strive to provide superior business, technology, and operational experiences for continued success.

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 supported 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. This became an essential capability in 2021, illustrating that COVID-19 required services firms to engage innovatively and remotely with many customers and still deliver the same level and quality of insight and service.
- Study participants continue to invest in technology expertise, along with partner ecosystem expansion, for network innovation in new and transformational technology solutions including multicloud networking, 5G, edge, and IoT.

- Development of new offers is based on customer requirements for solving current and future business, technology, and operational challenges. 2021 illustrated the need for continued focus on improved network security, increased business agility, and a faster and more secure on-ramp to cloud to accelerate digital transformation initiatives.
- End users in this study continue to state that 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 MARKETSCOPE VENDOR INCLUSION CRITERIA

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This IDC MarketScope includes analysis of worldwide network consulting services 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 services revenue of \$25 million or more
- Global delivery in three of four regions: North America (NA); Europe, the Middle East, and Africa (EMEA); Asia/Pacific (APAC); and Latin America (LATAM)
- Network consulting services surrounding the following solution areas:
  - Mobility including enterprise private mobile networks/5G, edge, and IoT
  - Video/collaboration/conferencing (UCC)
  - Customer experience solutions including service desk and contact center
  - Datacenter networking
  - SDN/NFV/network virtualization
  - SD-WAN/hybrid WAN/multicloud
  - Campus wired and wireless
- Network consulting services portfolio that spans assessment, design, and continuous improvement

## ADVICE FOR TECHNOLOGY BUYERS

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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 services 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.

In addition, enterprise decision makers must ensure:

- The services partner can define and deliver repeatable methodologies for technology, operational, and business outcomes
- A services firm 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 PROFILES

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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.

### HPE

Per IDC analysis and customer feedback, HPE is positioned as a Leader in this 2021 worldwide IDC MarketScape on network consulting services.

HPE Pointnext Services has thousands of IT experts positioned globally coupled with a robust partner network that deliver services in 200 countries around the globe. Since its introduction, the portfolio and the value proposition have continually aligned to meet new customer challenges and business, operational, and technology requirements. The portfolio offerings include solutions that are edge centric, data driven, and cloud enabled, all underpinned by a modern network that has been architected to be pervasive and intelligent and automated and secure. This service portfolio also reflects specific vertical solutions for manufacturing, IoT, telco, retail, healthcare, and public networks in venues and cities.

In addition, HPE Pointnext Services has evolved its portfolio to address other key customer requirements such as the ability to consume products and services "as a service," via HPE GreenLake. The HPE Pointnext GreenLake Financial model allows customers to consume and pay for only the components that they use, while the design and implementation services are bundled as part of the monthly pricing model. The new suite of offerings is now integrated in the portfolio enhancements, addressing the post-pandemic network solutions and operations requirements.

HPE Pointnext Services is continually evolving and expanding its offerings by providing services for its own HPE-based networking solutions as well as a full breadth of multivendor services. HPE Pointnext Services continues to invest to broaden its consulting capabilities for cloud, hybrid cloud, and SD-WAN (including acquisitions of Cloud Technology Partners, Red Pixie [2018], and Silver Peak [2020]). The company purchased Aruba in 2016, and it continues to operate as an independent brand. Aruba has

strong relationships with its customers and those positive customer sentiments extend to HPE and HPE Pointnext Services.

## Strengths

Among network consulting services firms worldwide, end users from IDC's *Worldwide Network Consulting Survey* consider HPE Pointnext Services for improved risk mitigation and management, improved network security, and driving competitive advantage and digital transformation.

End users state that HPE Pointnext Services "are very efficient and professional" and "deliver high quality and good benefit." One HPE Pointnext Services customer states the following about the company: "Continuous communication between sales/delivery and [our team]. And good involvement throughout the life cycle of the project with multiple deployments."

## Challenges

HPE GreenLake offers have been in the market only a few years and customers still require education and handholding to embrace these new business models. HPE Pointnext Services will need to amplify its education efforts in the market across all its infrastructure and network offerings to illustrate its ability to provide increased agility, customization, and cost reduction.

## APPENDIX

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### 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

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 services 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.

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***

An important component of this evaluation is the inclusion of data from IDC's *Worldwide Network Consulting Survey* of 500 end users examining the requirements of network consulting buyers where they highlighted key characteristics of the evaluated providers. This insight is captured in a broad-based random global end-user survey of network consulting services firm clients and reveals key insights regarding the capabilities of the individual firms. The survey also provides insights into the kinds of initiatives that enterprises are engaging consultants to help address. This web-based end-user survey is coupled with a significant effort to speak live with as many actual customers of the participants as possible.

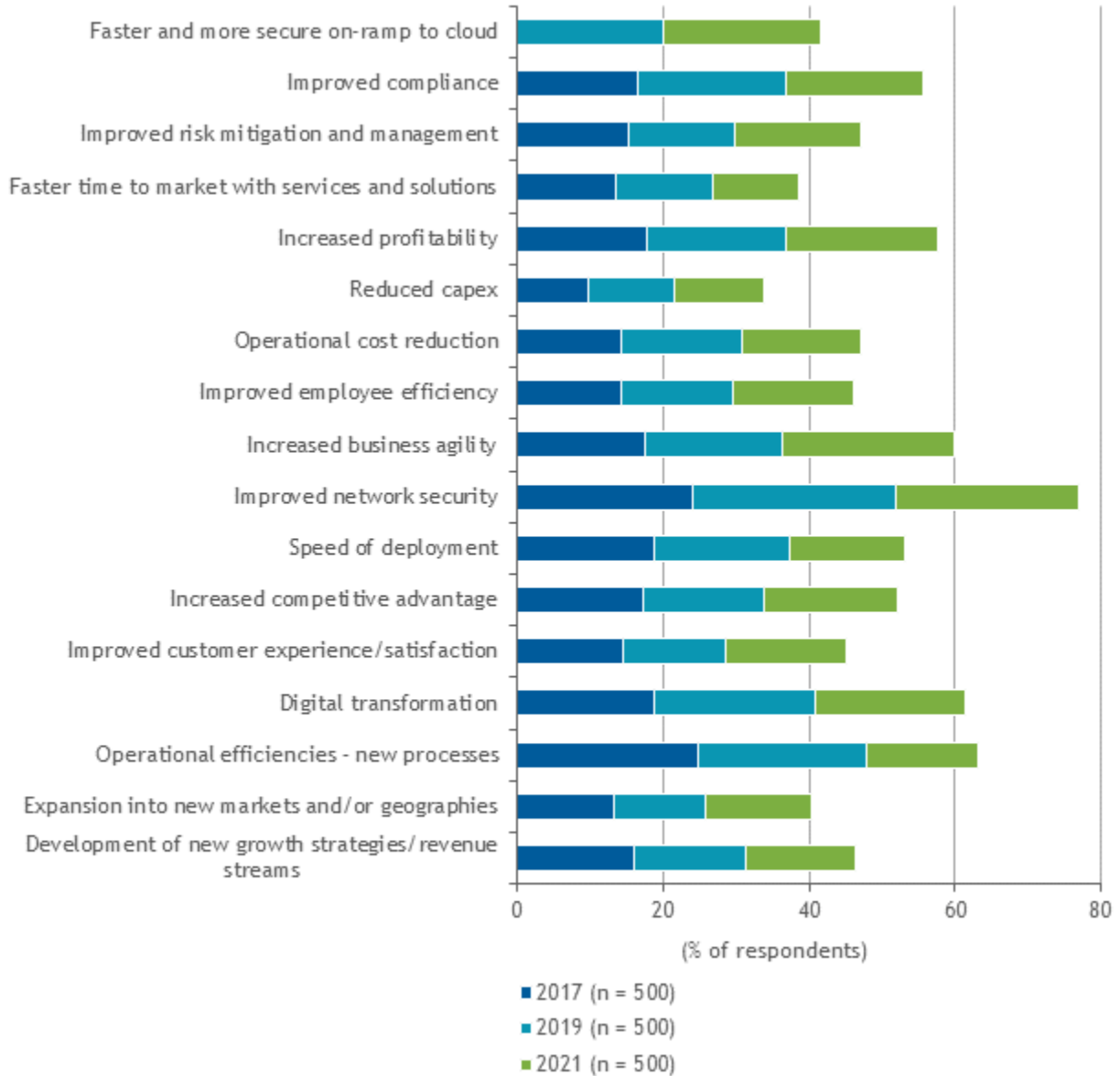
In IDC's 2021 *Worldwide Network Consulting Survey*, enterprise network consulting services buyers articulated a change in their priorities for their business, technology, and operational outcomes. Network security remains the top priority in 2021 over 2019, but increased business agility and faster and more secure on-ramp to the cloud stood out as business imperatives for 2021. These sentiments are in alignment with other IDC studies where business agility and digital resiliency are key enterprise priorities.

In 2019, network consulting services buyers considered improving network security, increasing operational efficiency, and accelerating digital transformation as among the top network transformation priorities. And in 2017, improved operational efficiencies, increased network security, and digital transformation were top of mind for enterprises – only a slight change in priorities from 2017 to 2019. In 2021, priorities completely shifted, demonstrating the impact that COVID-19 had on enterprises and the business, technology, and operational requirements that they had from their services partners.

Fortunately, IDC found during the course of this research that all participants had made the necessary realignments to their portfolios during the pandemic and have been able to successfully address their customers' requirements and business priorities in this "new normal" (see Figure 2).

**FIGURE 2**

**Importance of Business, Technology, and Operational Outcomes Comparison, 2017, 2019, and 2021**



Source: IDC's *Worldwide Network Consulting Surveys*, 2017, 2019, and 2021

**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 section that follows.

## ***Enterprise Network Consulting and Integration Services***

The enterprise market consists of public and private organizations that typically procure project-based 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 assessment
- Process improvement
- Benchmarking

## **LEARN MORE**

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### **Related Research**

- *Worldwide and U.S. Enterprise Network Consulting and Integration Services Forecast, 2021-2025* (IDC #US47748721, June 2021)
- *IDC's Worldwide Services Taxonomy, 2021* (IDC #US47191221, May 2021)
- *Worldwide Unified Communications and Collaboration Forecast, 2021-2025* (IDC #US47669321, May 2021)
- *Professional Services Help Enterprises Rationalize Technology and Financial Impacts of Network as a Service* (IDC #US47582921, April 2021)
- *Worldwide Enterprise Datacenter Network Consulting and Integration Services Forecast, 2020-2024* (IDC #US46993220, November 2020)



## 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 services firms must have the right mix of people, process, and technology to meet the demand," said Leslie Rosenberg, research vice president, Network Life-Cycle and Infrastructure Services at IDC.

## 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.

## Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
blogs.idc.com  
www.idc.com

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