



IDC MarketScape

IDC MarketScape: Worldwide Network Consulting Services 2026 Vendor Assessment

Leslie Rosenberg

Chris Barnard

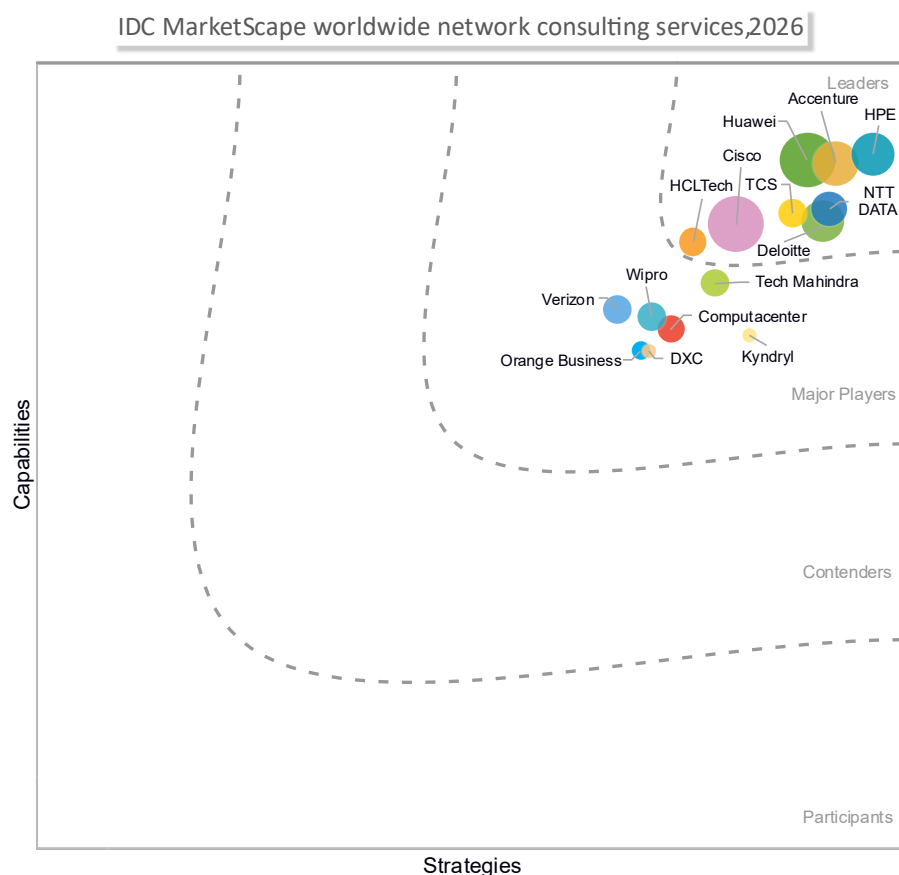
Bruno Teyton

THIS EXCERPT FEATURES NTT DATA AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide network consulting services vendor assessment



Source: IDC, 2026

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Network Consulting Services 2026 Vendor Assessment (Doc # US53764826)

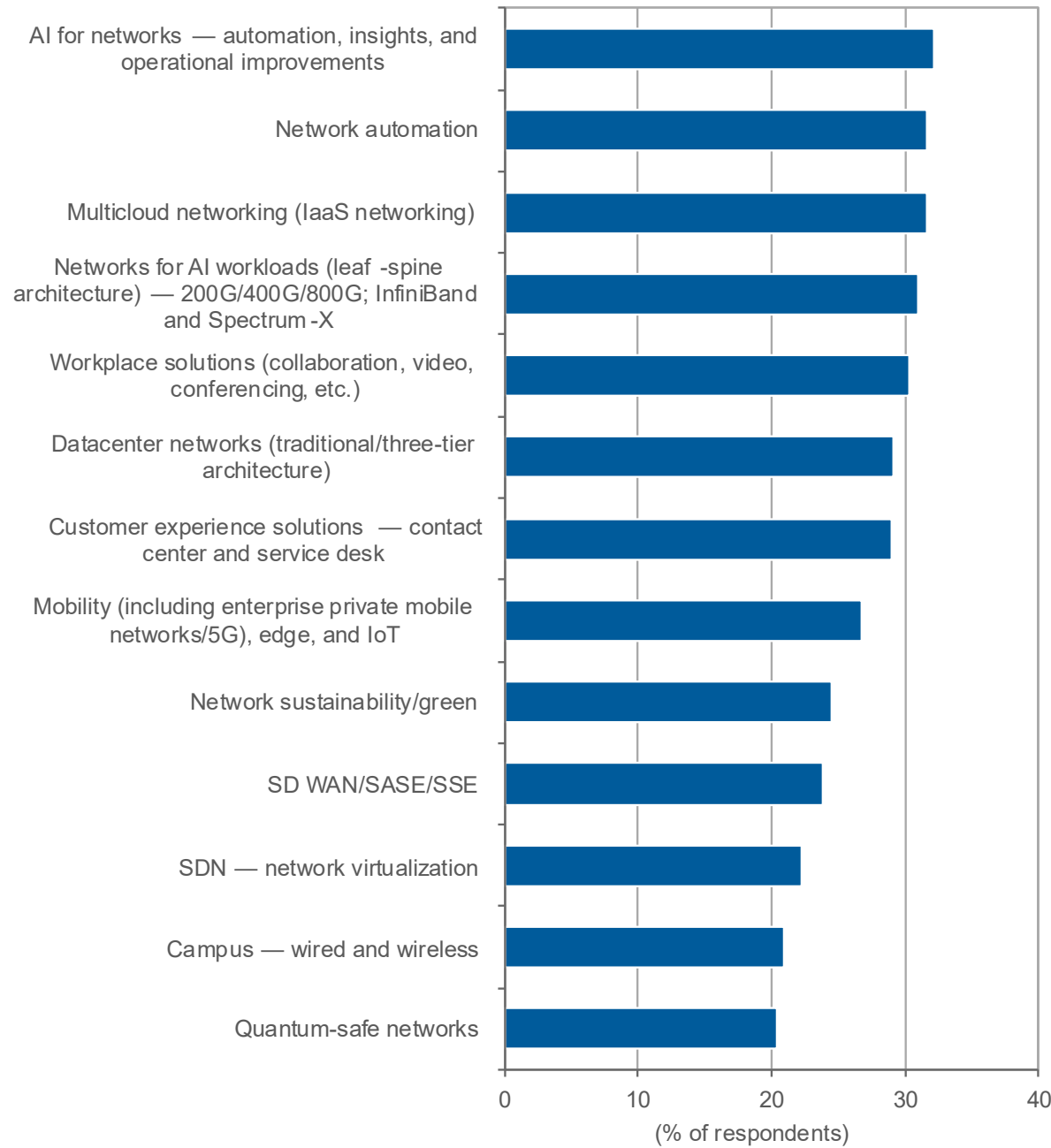
IDC OPINION

The findings from this 2026 IDC MarketScape for network consulting services indicate that buyers are increasingly engaging network consulting firms to address rising architectural complexity, accelerate digital transformation, and mitigate risk in hybrid and increasingly distributed environments. Many buyers lack in-house skills across multivendor ecosystems, software-defined networking (SDN), automation, and security integration. As a result, they seek external expertise for independent assessments, architecture design, vendor selection, migration planning, and program governance. Network consulting services firms are also engaged to provide objective validation of network strategy, cost optimization road maps, technical debt reduction, and alignment between business priorities and infrastructure investments.

Organizations turn to network consulting services firms when undertaking large-scale modernization initiatives such as cloud migration, datacenter transformation, SASE rollouts, or AI-ready network infrastructure upgrades. Buyers most frequently utilize network consulting services in conjunction with next-generation architecture. These include hybrid and multicloud networking, software-defined WAN (SD-WAN), secure access service edge (SASE), zero trust architectures, datacenter fabric modernization, AI-enabled campus networks, private 5G, and edge networking deployments. As enterprises adopt distributed operating models, they will require architectural redesign that integrates security, automation, observability, and performance management across cloud, edge, and on-premises domains. Network consulting engagement is particularly strong in multivendor environments where interoperability, policy consistency, and orchestration complexity demand advanced design expertise. Buyers also leverage network consulting when transitioning from legacy hardware-centric architectures toward software-defined, API-driven, and consumption-based network models. Network automation, AI for networking, as well as networks designed to support AI initiatives will be a driver for network consulting engagements (see Figure 2).

FIGURE 2

Top networking initiatives enterprise buyers engage network consulting services to accelerate



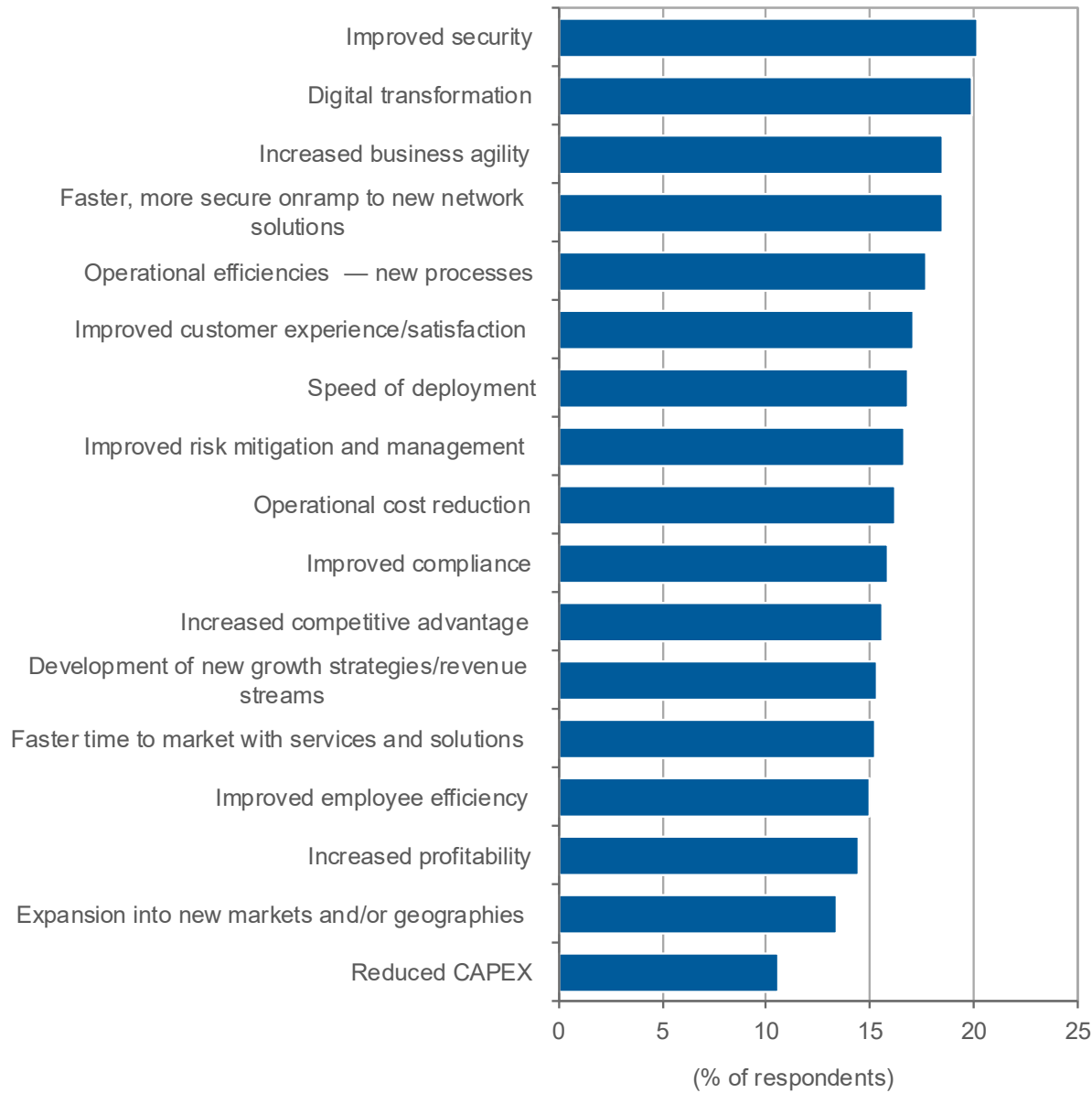
n = 500

Source: IDC's *Worldwide Network Consulting Services End User Survey*, March 2026

From a business perspective, the top outcomes network consulting buyers seek include improved agility, faster time to deploy new digital services, cost transparency and optimization, risk reduction, and stronger alignment between IT and business strategy. Technology outcomes typically center on enhanced network performance, improved security posture, greater scalability, and modernization of legacy infrastructure. Operationally, buyers aim to increase automation, standardization, visibility, and resiliency while reducing manual tasks and operational overhead. According to the IDC's *Worldwide Network Consulting Services End User Survey*, March 2026, insights, organizations that effectively leveraged network consulting services reported meaningful progress toward these objectives — particularly in accelerating transformation timelines, reducing architectural complexity, and strengthening governance frameworks. However, the degree of success often depended on the services firm's ability to translate strategy into executable road maps and integrate change management across IT and business stakeholders (see Figure 3).

FIGURE 3

Top business, technology, and operational outcomes achieved when working with a network consulting services provider



n = 500

Source: IDC's *Worldwide Network Consulting Services End User Survey*, March 2026

An important trend highlighted in the research is the growing demand for outcome-based and value-focused consulting models. Buyers increasingly expect measurable business impact rather than purely technical deliverables. They are prioritizing network consulting

services firms that can demonstrate industry-specific expertise, provide benchmarking insights, and link network modernization directly to digital revenue enablement, customer experience improvements, and regulatory compliance. There is also rising interest in advisory services that bridge network strategy with broader enterprise architecture domains such as cloud, cybersecurity, AI infrastructure, data strategy, and sovereignty. This reflects a shift from siloed networking projects to integrated transformation programs.

Network consulting firms are leveraging AI and machine learning techniques to improve service delivery capabilities. These include AI-assisted network assessments, predictive modeling for capacity and performance planning, automated discovery and topology mapping, and ML-driven analytics for benchmarking and anomaly detection. Firms are embedding generative AI tools to accelerate documentation, design scenario modeling, configuration validation, and proposal development. AI is also being used to enhance migration simulations, risk analysis, and automated policy validation in complex multicloud environments. By integrating AI/ML into network consulting methodologies, leading providers are improving delivery speed, increasing architectural accuracy, reducing human error, and providing more data-driven recommendations — thereby strengthening their value proposition to buyers navigating increasingly intelligent and autonomous network environments.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Network consulting services are an evolving market, and the tech buyers will find it valuable to understand where the participants are heading directionally. As one would expect from a mature market, overall, the participant firms performed very well on this assessment as the services firms have been selected because they have met the required criteria and have mature network consulting service offerings. It is important to understand that while this a mature market, it is also extremely competitive and the participants continue to invest to provide exceptional technology expertise, tools, and resources for consistency and innovation as well as 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.

IDC collected and analyzed data on 15 firms — including network equipment vendors, global systems integrators (GSIs), and the services arms of global telecommunications providers for this IDC MarketScape. It is important to note the strategic relationships and ecosystem partnerships between most of the participants in this study.

As organizations and their priorities become increasingly dispersed around the globe, developing a vetted team of experts that can deliver a foundation of highly resilient, secure, and dynamic network infrastructure will be critical. In some cases, a leader in a particular region or a vertical industry expert may own the customer relationship but rely on another partner for more global or technical capabilities, so, naturally, the participants in this study

are partners and coopetitors with each other for the ability to successfully deliver networking solutions to their customers. It is important to view the market through this lens.

To determine the group of participants for analysis in the IDC MarketScape, IDC utilized the following set of inclusion criteria:

- **Global scale:** Three of four geographies (North America, Latin America, EMEA, APAC)
- **Revenue:** \$40 million in network consulting revenue
- **Network consulting services offering:** A full suite of consulting/advisory (strategy, planning, assessment, design, adoption, and optimization) offerings across a comprehensive set of network solutions:
 - Private mobile networks
 - Datacenter networking
 - Datacenter networking for AI workloads
 - SDN/NFV/network virtualization
 - SD-WAN/multicloud networking
 - Edge networking and Internet of Things (IoT)
 - Campus networking
 - Wired/wireless networking
 - Workplace solutions (collaboration, UCC, video, etc.)

Exclusions are:

- Implementation services, support services, and managed services are not included in this study. IDC believes these services are critical components of the life cycle, but for the purposes of this study, the evaluation will solely focus on network consulting services or the "plan" phases of the life cycle.

ADVICE FOR TECHNOLOGY BUYERS

As AI impacts every area of technology, including professional services, it will be critical that buyers of network consulting services understand the investments that their services partners continue to make to enhance their service delivery capabilities, technology expertise, and thought leadership. IDC recommends technology buyers ask questions about the following market dynamics to understand the new value proposition your network consulting services provider can deliver:

- **Outcome and impact-based engagements with measurable KPIs.** This is a pivot from traditional time and materials or fixed-price contracting.

- **Technology expertise no longer the main requirement.** Delivering insights and enablement ensures successful adoption and value realization.
- **Project-based services evolve.** Intelligent platforms that provide actionable recommendations and insights ensure continuous optimization of complex networking environments.
- **Standardized, repeatable consulting.** This improves consistency and reduces delivery timelines. AI-enabled proprietary tools, automation frameworks, benchmarking data sets, and industry-specific assets are key investments.
- **AI and automation capabilities for improved service delivery:** AI/ML is embedded into consulting (assessments, simulations, validation, and analytics). Assess how providers use AI to accelerate delivery, improve accuracy, and reduce risk.
- **Multivendor and interoperability expertise.** In increasingly heterogeneous environments, success depends on integration across vendors and platforms. Ensure your consulting partner demonstrates strong capabilities in interoperability, policy consistency, and orchestration across hybrid and multicloud ecosystems.
- **Skills gaps with structured knowledge transfer.** Given internal skill shortages, prioritize partners that enable your teams, not just deliver projects. Look for capabilities in training, documentation, and operational handover to ensure long-term self-sufficiency.
- **Strong multidomain expertise.** Network consulting is no longer isolated. Ensure your partner can integrate networking with cloud, cybersecurity, AI infrastructure, and data strategy, reflecting the shift toward end-to-end digital transformation rather than siloed projects.

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.

NTT DATA

NTT DATA is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide network consulting services.

NTT DATA delivers a globally consistent, AI-first network consulting portfolio that spans campus, branch, edge, datacenter, cloud, OT, and private 5G environments. The firm has embedded AI/GenAI and agentic AI across its consulting life cycle, particularly in discovery, analysis, and documentation, which improves documentation efforts and accelerates site

surveys through AI-assisted automation. Its Client Experience Platform (CXP) serves as a unified, AI-enabled consulting workbench that automates data collection, benchmarking, report generation, and downstream integration into support and managed services, ensuring predictable quality and faster delivery across 190 countries. NTT DATA combines engineering with platform-driven consulting to help clients build secure, AI-ready network architectures aligned to business outcomes.

NTT DATA's standardized consulting methodology (engage, initiate, discover, analyze, recommend, conclude, and manage) ensures global repeatability and alignment to business, technology, and operational objectives. This modular framework allows consulting teams to assemble assessments tailored to each client, including network strategy and modernization, infrastructure life-cycle assessments, network readiness for AI, WAN/edge/SASE transformation, cloud and datacenter optimization, and zero trust network reviews. CXP enhances these assessments by providing telemetry integration, automated scoping, predictive insights, and benchmark comparisons against thousands of prior engagements. These capabilities allow NTT DATA to create transformation road maps that tightly link network modernization to measurable business outcomes such as resilience, cost optimization, carbon reduction, operational efficiency, and AI-workload readiness.

NTT DATA is also making targeted investments in regions and industries where network modernization and sovereign AI infrastructure are accelerating. A major expansion in Europe and the Middle East focuses on sovereign AI factory infrastructure, supported by a specialist team, new datacenter-based AI labs, and early lighthouse deployments in healthcare, manufacturing, and research environments. The firm is also scaling consulting capabilities in North America to support large enterprises and AI-driven network transformation. Vertical expertise is reinforced by joint frameworks with business consulting teams. These investments position NTT DATA to guide clients through end-to-end modernization from advisory to architecture, deployment, life cycle, and managed services.

Strengths

NTT DATA stands out for its AI-first consulting model, leveraging CXP and agentic AI to automate assessments, accelerate delivery, and generate predictive, business-aligned insights at a global scale. Its deep engineering, certifications, and vertical and regional investments, particularly in sovereign AI infrastructure in Europe, enable differentiated, high-value engagements. An end-user survey respondent and NTT DATA customer states, "NTT DATA has optimized our performance and sustainability in real time with its continuum of services for edge and cloud."

Challenges

NTT DATA operates a globally integrated consulting delivery model that leverages network, AI, and security assessment capabilities across nearshore and offshore locations to support

complex engagements. However, its relatively small consulting workforce footprint in North America may limit visibility in the world's largest IT services market, requiring continued investment and workforce expansion. In addition, as innovation continues to accelerate in automation and AI-driven consulting, NTT DATA must maintain rapid innovation in CXP and agentic AI capabilities to preserve differentiation.

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.

In this IDC MarketScape, we have chosen to place additional emphasis on a participant's strategic investments and direction. This is a dynamic time in the market, with significant investments in AI and service delivery platforms. We felt it essential to reflect the investments participants are making to enable their customers and differentiate themselves competitively.

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 in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

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, including campus, branch, datacenter, multicloud, edge, OT, and private 5G network architectures that allow voice, video, and data applications 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, including design, integration, and optimization services around their LAN, WLAN, WAN, datacenter, edge, OT, and private 5G infrastructures to serve the needs of their employees, partners, and customers. 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

Related research

- *Worldwide Private 4G/5G Networks Managed Services and Professional Services Forecast, 2025-2029* (IDC #US52872225, October 2025)
- *Market Analysis Perspective: Worldwide Enterprise Network Consulting and Integration Services, 2025* (IDC #US53787825, September 2025)
- *Worldwide and U.S. Enterprise Network Consulting and Integration Services Forecast, 2025-2029* (IDC #US53609925, June 2025)
- *IDC MarketScape: Worldwide Network Consulting Services 2024 Vendor Assessment* (IDC #US52056924, May 2024)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of several providers participating in the worldwide network consulting services market for 2026. 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. The document highlights the importance of new defining thought leadership and delivery best practices for mature as well as emerging networking technologies alike. It also provides an assessment of various network consulting services firms, their strengths, challenges, and when to consider them.

"As enterprises navigate rising architectural complexity, accelerating digital transformation, and persistent skills gaps across multivendor environments, network consulting services have become an essential strategic lever — enabling organizations to accelerate transformation timelines, reduce technical debt, and align infrastructure investments directly to outcomes," states Leslie Rosenberg, research vice president, Network Life Cycle and Infrastructure Services, IDC. "IT buyers that effectively engage network consulting firms report meaningful progress in designing AI-ready infrastructure, modernizing legacy networks, and building the frameworks needed to sustain long-term operational resilience."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

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