

## Competitive Intelligence Service

# Business Network and IT Services

The **Business Network and IT Services** industry is one of the most dynamic and investment intensive industries in the world, fueled by a combination of deregulation and rapid technology developments that has led to a complete transformation of the market. It's essential for industry players to keep a close eye on this evolving ecosystem of network operators, IT service providers, OTT Internet companies, and software and hardware vendors, to meet customers' demand for more integrated and cloud-based solutions tailored to their business. Real-time competitive intelligence has become a vital component to the marketing and sales strategies of telecom and IT organizations worldwide.

Intensifying cost pressures and competitive concerns are driving organizations to explore their options to outsource IT functions and consider cloud services as a way to operate more effectively, efficiently, and successfully through difficult global economic conditions. This redefining of what is strategic and should be kept in-house, and what is merely a utility function that can be handed over to external service providers is accompanied by an increased focus on end-to-end application performance management between any fixed or mobile device and any application server.

The **Current Analysis** coverage of the **Business Network and IT Services** industry includes analysis of U.S., European, and global telecom and IT competitors that sell services to enterprises, from SMEs up to the largest multinational companies, as well as wholesale carrier services. We cover a unique blend of network operators, IT service providers, challengers, and emerging disruptors. Much of our coverage focuses on the competitive landscape around data center and cloud, UCC, enterprise mobility and the networks and security that underpin the delivery of key applications. We do this through in-depth product and competitor assessments and timely analysis of key service launches, deals, partnerships, acquisitions and market trends shaping our industry.

## Business Network and IT Services Market Segments Covered

**Current Analysis** delivers competitive response solutions for companies competing in fast-paced markets, including:

- Data Center and Cloud Services
- Mobility Services
- Network Services
- Security Services
- IP Telephony and Unified Communications Services
- Wholesale Services

**Current Analysis** provides Competitive Response Solutions that enable companies to effectively anticipate and counter competitive threats, and win more business.

This is achieved through the rapid delivery of tactical, actionable intelligence to help fast-paced companies compete in the highly volatile telecom, networking, and business software markets.

As the only company to provide comprehensive Competitive Response solutions, **Current Analysis** is capable of supporting many roles across the organization. Sales teams, product managers, marketing professionals, and executives now have complete access to the business intelligence they need to be more competitive.

Business Network and IT Services

# Analyst Team



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## Business Network and IT Services

## Key Competitors Covered

United States	Europe	Global Enterprise	Wholesale
AT&T Broadview Cbeyond CenturyLink Charter Comm. Comcast Cox Business EarthLink Business Frontier Comm. Granite Telecom. Hughes Network Systems Integra Telecom Level 3 Masergy MegaPath Optimum Lightpath Sprint Nextel T-Mobile USA TelePacific Comm. Time Warner Cable Business Class tw telecom Verizon Windstream XO Communications	AT&T Azzurri Belgacom BT Cable&Wireless Colt Deutsche Telekom Easynet Elisa Exponential-e Interoute Kcom KPN Getronics Level 3 Orange Business Services QSC Sunrise Swisscom TalkTalk Business T-Systems TDC Telecom Italia Telefónica Telekom Austria Telenor TeliaSonera Verizon Virgin Media Business Vodafone Vtesse	<b>IT SPs/Integrators</b> Accenture Atos Capgemini CSC Computacenter Dell Services Dimension Data Fujitsu KPN Getronics HP Enterprise Services IBM Global Services Tata Consultancy Services T-Systems  <b>Operators</b> AT&T BT Global Services Cable&Wireless Deutsche Telekom MNC FreeMove Level 3 NTT Communications Orange Business Services Pacnet PCCW Reliance Globalcom Singtel Tata Communications Telefónica Telstra International Verizon Vodafone	Akamai AT&T Belgacom ICS BT Wholesale Cable&Wireless Colt Deutsche Telekom ICSS Interoute KPN/iBasis Level 3 Limelight Networks MegaPath NTT Communications Opal Telecom Orange Business Services Tata Communications Telecom Italia Sparkle Telefónica TeliaSonera IC Verizon Global Wholesale Virgin Media Business

## Business Network and IT Services

## Data Center and Cloud Services

The **Current Analysis** coverage of **Data Center and Cloud Services** focuses on the market trends and service offerings from all major suppliers delivering both traditional solutions and on-demand services to enterprise customers. This includes the leading telecom operators, hosting providers as well as IT service providers. Key topics include virtualization (e.g., server, storage and desktop), Software as a Service (SaaS) and Infrastructure as a Service (IaaS) solutions. Coverage also focuses on service provider go-to-market strategies, including how providers are partnering to guarantee their future competitiveness and relevance in this space. Other topics include hosting, managed application services, business continuity and disaster recovery (DR), data center security, and energy efficiency measures.

Coverage areas include:

- Cloud Services (SaaS, PaaS, IaaS)
- Managed Application services
- Utility Computing
- Managed Hosting
- Virtualization
- Business Continuity/Disaster Recovery
- Managed Storage
- ITIL Service Management
- Energy Efficiency Measures
- Physical/Logical Site Security

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**Mobility Services**

The **Current Analysis** coverage of **Mobility Services** focuses on the services, go-to-market strategies and positioning of network and IT service providers that offer mobility solutions to enterprise customers. The service covers all of the components of managed mobility from mobile voice and data to device management and security, telecommunications expense management, FMC/UC, mobile application enablement and M2M connectivity, value-added services and strategies. Mobility Services will also selectively cover the services and product roll-outs of non-carrier partners (such as middleware, device and equipment providers, mobile applications vendors and device management solutions).

Coverage areas include:

- Mobile voice and data service within managed services contracts
- Device Management and Security
- Telecom Expense Management
- Fixed Mobile Convergence and Mobile Unified Communications
- Global Remote Access
- M2M Connectivity and Value-added Services
- Mobile Application Enablement and Delivery
- Managed Mobility Solutions

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# Network Services

The **Current Analysis** coverage of **Network Services** tracks carriers' activities in traditional and next-generation metro, long-haul and international telecom services. The sector examines services supplied both by incumbent carriers and newer competitors, and focuses on their efforts to introduce and enhance services, extend their reach, streamline operations, and assist customers in assembling and managing enterprise networks.

**Current Analysis** also offers a premium **Global Network Tracker** service that tracks PoP ownership and NNIs of leading carriers across key markets globally.

Coverage areas include:

- MPLS VPN
- CPE-based VPNs
- Managed WAN
- Ethernet
- Optical Transport
- Broadband
- WAN Acceleration and Optimization
- Voice and Access Bundles

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# Security Services

The **Current Analysis** coverage of the **Security Services** sector focuses on managed and outsourced services such as security assessment, intrusion detection/prevention services (IDS/IPS), authentication, hosted application security and professional services offerings designed to help enterprise customers mitigate risks and maintain consistent and reliable access to their network resources.

Coverage areas include:

- Intrusion Detection and Prevention
- DDoS Mitigation
- Clean Pipes
- Managed Authentication
- Identity Management
- Mobile Security
- Cloud Security
- Governance, Risk and Compliance
- Business Continuity
- Security Information and Event Management

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## IP Telephony and UC Services

The **Current Analysis** coverage of **IP Telephony and UC Services** focuses on stand alone and integrated solutions from core IP Telephony products (e.g., managed IP PBX, network-hosted VoIP, integrated access, trunking and UC solutions that provide end users with enterprise instant messaging (IM), presence awareness and access to a rich set of real-time multimedia collaboration applications, regardless of location or preferred means of access. This area also includes Telepresence. In addition, there is special focus on 'communications as a service' and UCaaS, and rigorous monitoring on how providers are aligning within the ecosystem. There is also a focus on desktop integration, VDI and the potential substitution of the IP PBX.

Coverage areas include:

- Hosted IP Telephony
- Managed CPE
- SIP Trunking
- Unified Communications and Collaboration
- UCaaS
- Telepresence
- Fixed Mobile Convergence

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# Wholesale Services

The **Current Analysis** coverage of the **Wholesale Services** sector provides insight into the competitive landscape for service providers in the international carrier-to-carrier services market. The module covers traditional voice/data connectivity and services for mobile network operators, as well as new and evolving strategies in the areas of CDN and media services, all-IP communications, wholesale cloud, managed services, and consulting. The analysis covers Tier 1 major global telcos, as well as newer market entrants and alternative operators.

Coverage areas include:

- **Transport** – covers Layer 1 physical network, and Layer 2 and 3 data transmission including core and edge backbone capacity and aggregation, IP Transit, and last-mile access. Also looks at bilateral and peering arrangements.
- **Ethernet** – focuses on Layer 2 Ethernet connectivity and transport solutions from basic interconnectivity through to value-added Ethernet VPN and mobile backhaul over Ethernet, and DWDM wavelengths. Also looks at E-NNIs and the evolution of Ethernet Exchanges.
- **IP Services** – focuses on platform-based IP communications, including basic and premium QoS-enabled VoIP, IP Centrex, SIP trunking, Telepresence and data WANs. Also focuses on next generation cloud services developed as white-label cloud enablement solutions for resale.
- **CDN and Media Services** – focuses on traditional caching and distribution of video and content on the Web, and on private networks and coverage of content trading and rights management. This focus area also includes coverage of the delivery of video content moving into higher value services beyond basic CDN, such as advanced video compression and broadcasting.
- **Managed services** – covers managed wholesale solutions, network consulting including NGN migration, and managed infrastructure and operational processes. This area also includes managed cloud and data WAN services, managed broadband, and managed wholesale voice platforms.
- **Mobile wholesale services** – examines the portfolios and strategies of wholesale telecom companies seeking to meet the needs of Mobile Network Operators (MNOs), including for example international roaming, hubbing, mobile broadband and data, mobile voice termination, IP eXchange, MMS, SMS, GRX, and so on.
- **Voice** – covers traditional fixed-line telephony transport and worldwide termination, including voice exchanges and wholesale call signaling/voice routing features.

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## Business Network and IT Services

# Products Covered

### Global Enterprise Product Classes

- Cloud Security Services
- Customer Support
- Data Center Services
- Data WAN Services
- IP Telephony and Unified Communications Services
- IT Service Provider Mobility
- M2M Services
- Managed Mobility Services
- Managed Security Services
- Remote Access Services
- Telepresence Services
- Workspace Management Services

### US Product Classes

- Data Center Services
- Enterprise Mobility Services
- Ethernet Services
- IP Telephony and Unified Communications Services
- IP VPN Services

### Europe Product Classes

- Data WAN Services (UK)
- IP Telephony and Unified Communications Services (UK)

### Wholesale Product Class

- Content Delivery Networks

## Business Network and IT Services

# Global Network Tracker

The **Current Analysis Global Network Tracker** service provides a competitive database of the countries and cities where leading carriers own network PoPs, and have NNIs with other carriers in order to deliver IP/MPLS VPNs and Ethernet VPLS, and Ethernet and DSL access. The service is designed to help competitors bid more effectively on global network deals for multinational customers.

Features of the **Current Analysis Global Network Tracker** include:

### Global Network Database

Using the **Global Network Tracker** database, clients can quickly find what a carrier can offer in a particular region, country or city and build up a picture of global service capabilities and where they can deliver services on-net. Updated every six months, the database includes carrier offerings in Western Europe, Eastern Europe, United States and Latin America, Middle East and Africa and Asia Pacific.

### Global Network Alerts

Concise impact analysis reports alert clients whenever major competitors have expanded their network reach, upgraded their network or service capabilities in a region via their own infrastructure or NNIs.

### Advisory Market Trend Reports

Published every six months, Market Trend Advisory reports provide market commentary on the global network operator market, new network expansion, partnerships and MNC bid activity, and determine competitiveness by geographical region.

### Carrier Competitiveness Ratings

Analysts call out which carriers are competitive by region for MPLS, Ethernet Private Line, Ethernet Virtual Private Line and VPLS services, as well as DSL and Ethernet access.

### Talk to an expert

Analyst inquiry time is bundled in with subscriptions to the **Global Network Tracker**.



### Companies Tracked

- AT&T
- BT Global Services
- Cable&Wireless
- CenturyLink
- Colt
- Interoute
- KPN
- Level 3
- NTT Communications
- Orange Business Services
- PCCW
- Reliance Globalcom
- SingTel
- Sprint
- Tata Communications
- Telefónica
- Telstra International
- TI Sparkle
- T-Systems
- Verizon