

How enterprise network priorities are changing; services that help enterprises make the transition



中国移动
China Mobile

International

China Mobile International: Global Enterprise Network Trends and Capabilities Assessment

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Brian Washburn
Practice Leader, Network Transformation
brian.washburn@omdia.com

Summary



In brief

This white paper by Omdia (formerly known as Ovum) is divided into two sections: The first part covers industry trends faced by global enterprise networks. The second part is an assessment of China Mobile International (CMI) enterprise services and support capabilities. The purpose of this white paper is to help multinational enterprises understand the massive shifts that are happening to fundamental building blocks of their networks, and how these changes relate to their assets such as data centers and cloud services. The white paper also recommends actions enterprises might take in light of these major trends. The CMI assessment reviews the service provider's portfolio to help enterprises shift to new network and cloud services models.

Omdia view

The nature of networks is changing on many fronts. The cloud is unraveling the enterprise network. When enterprises refocus around cloud services and data centers, their network architecture becomes simpler, and the need for obscure enterprise MPLS features goes away. It becomes less important to use a telco partner with the largest footprint. Instead, telco networks become more of a cost-driven utility. Enterprises need a partner that gives them personalized account attention, one with relationships with many other service providers.

While the WAN is simplifying, expertise to help in managed services—especially software-defined WAN (SD-WAN)—has become more important. Enterprises need flexible managed services in the form of a partner that can step in to help if the enterprise needs it. Enterprises facing change do not always know in advance if or when they will need managed services, for example, to repoint enterprise networks around cloud, to reassess traffic flows when moving to hybrid networks, or to plan and execute a smooth migration of the existing enterprise network to SD-WAN.

CMI's portfolio supports the range of core network and related managed services that multinational enterprises need to adopt new operating models. CMI has transport, Ethernet, MPLS VPN, and network gateway services that reach dozens of countries worldwide, and the operator continues to expand its network. CMI provides managed services for SD-WAN, routers, and other customer premises equipment (CPE); hosts

internet data centers and private cloud services in its own and partner data centers worldwide; and offers unified communications and content delivery services. CMI helps protect enterprises through a portfolio that includes network security, access management, secure Wi-Fi, distributed-denial-of-service (DDoS) protection, and other enterprise assets. CMI supports multinational enterprises through offices located worldwide. While most big global enterprise network providers are cutting back and retrenching their positions, CMI is investing and expanding its global presence.

Key messages

- When enterprises refocus around the cloud, they can simplify their networks. Enterprises become less locked into a single global provider and can choose partners based on personalized account attention and reasonable prices.
- Personalized account attention is vital to help enterprises with changes such as cloud connections, SD-WAN, and hybrid networking. Enterprises need a partner with expertise and flexibility and account managers who are available and willing to have impartial conversations to help evaluate options.
- Enterprises take many different directions in data center and cloud strategies: some need direct, high-performance cloud connectivity; others connect their enterprise WAN to data center interconnect and cloud exchange partners; others run a private cloud inside their own data center. Enterprise IT decision makers should look for a partner that gives personalized attention, has expertise, is flexible, and offers a range of options and alternatives.
- Managed services on the premises (managed LAN and wireless LAN) continue to be significant options for enterprises. What was once relatively simple Wi-Fi is maturing. Enterprises are putting greater demands on their wireless LANs.
- Network functions virtualization (NFV) remains a niche service for now. Enterprise adoption of on-premises, commercial enterprise NFV services remains limited, but continues to show long-term promise.