

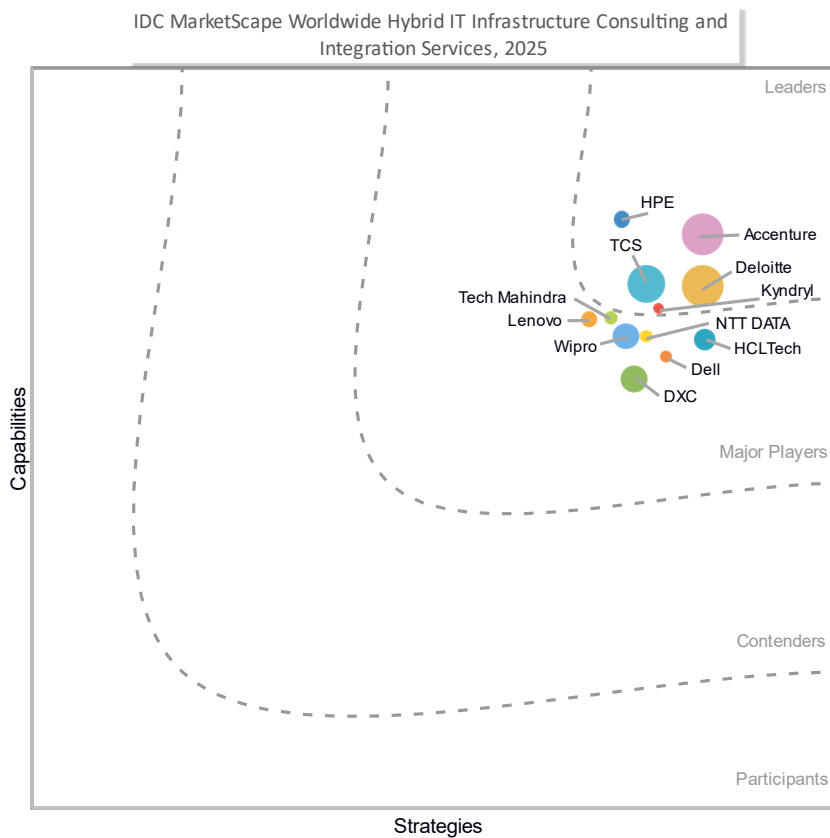
IDC MarketScape: Worldwide Hybrid IT Infrastructure Consulting and Integration Services 2025 Vendor Assessment

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IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Hybrid IT Infrastructure Consulting and Integration Services Vendor Assessment



Source: IDC, 2025

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

IDC OPINION

IDC continues to see a rise in cloud adoption and operating models to gain agility, efficiency, and competitive advantage. Today's rapidly evolving digital landscape, which is increasingly hybrid (traditional, on/off-premises private, public, or edge), requires a well-architected, intelligent, and optimally performing infrastructure for success. To keep ahead of competitors, navigate geopolitical and fiscal headwinds, and leverage the introduction of new technology paradigms (such as AI/GenAI), organizations must ensure that their foundational technology infrastructure and workforce are modernized, agile, and positioned to capitalize on the next wave of innovation.

For many enterprises, devising and implementing a hybrid IT infrastructure strategy will be overwhelming, given limited resources and skills constraints coupled with tight IT budgets. This IDC MarketScape evaluates a set of consulting and integration partners that include equipment manufacturers as well as global systems integrators (GSIs) that have created a portfolio of professional services offerings that help enterprise customers design, implement, and operate a modern hybrid IT infrastructure strategy in support of business, technology, and operational objectives.

IDC conducted dozens of in-depth enterprise customer interviews, fielded a web-based global survey, and had extensive briefings with the participating services firms to understand hybrid IT infrastructure challenges and opportunities organizations face and the consulting and integration services required to successfully achieve their objectives. The research highlighted key hybrid IT infrastructure trends, and it is not surprising that these themes are addressed in the portfolios and capabilities that services firms are presenting to the market, clearly illustrating that the services firms evaluated in this study are highly attuned to their customers' challenges and hybrid IT objectives. Further:

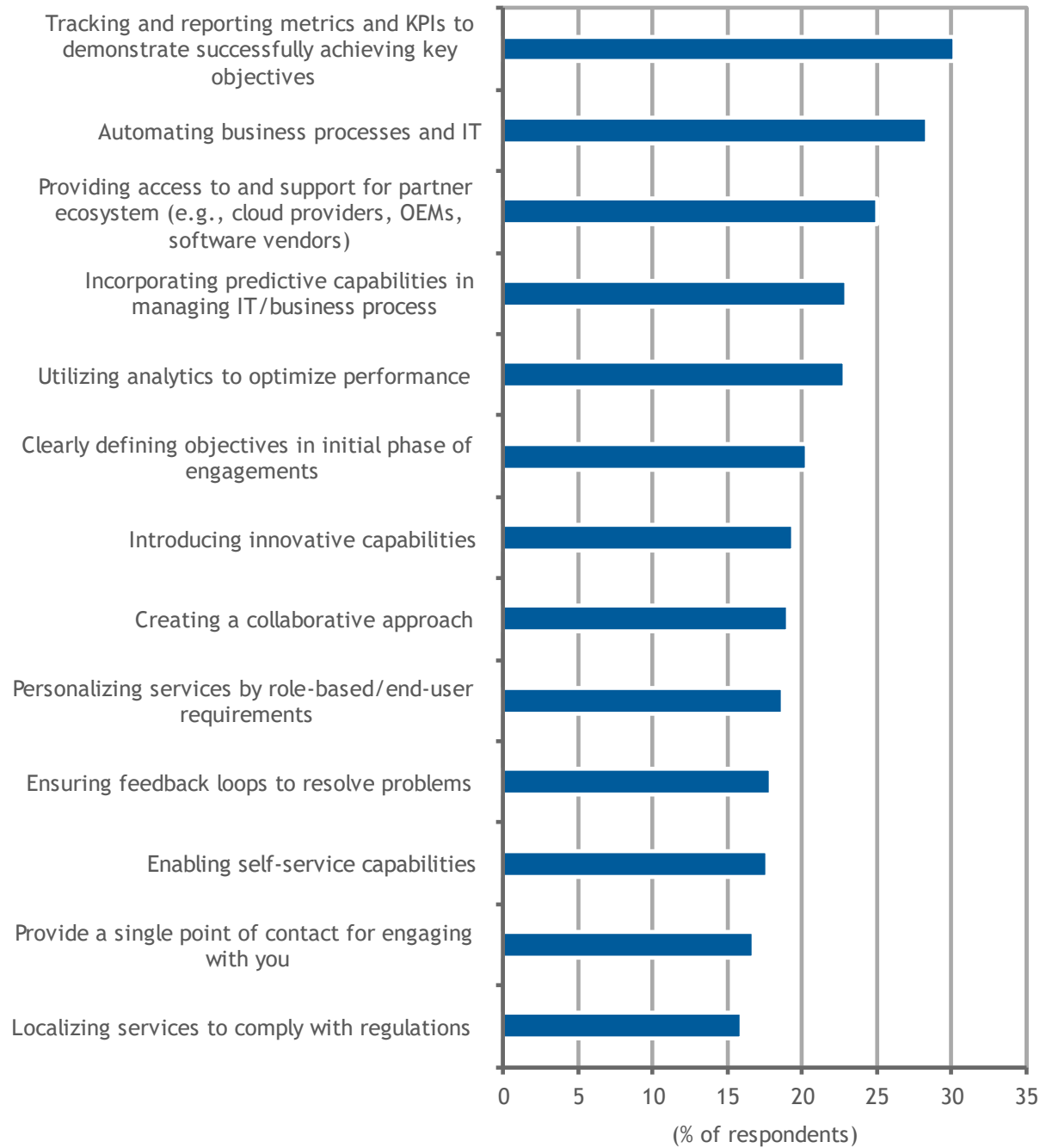
- **Full-stack value realization:** It includes best practices to maximize the return on investment (ROI) across all deployment locations. This is a holistic exercise incorporating ROI/TCO models, FinOps adoption, rightsized infrastructure and applications, new consumption models, technical debt reduction, operational process improvements, and new skills development in alignment with business imperatives. Many large enterprises have adopted FinOps best practices, but most stated they need support/best practices from their GSI partners.
- **Automation and AI/ML:** These are integral components of all hybrid IT consulting and integration solutions across tools and processes. Organizations

stated that having automated infrastructure and processes to achieve modern operations is a priority and is one of the key outcomes they expect to achieve when working with a services partner (see Figure 2).

- **Adoption and optimization services:** Services firms have developed resources and assets to ensure effective knowledge transfer, thorough documentation, and best practices for operating across all their environments (see Figure 2). These capabilities, whether digital or human delivered, ensure utilization, customer satisfaction, and maximization of investments.
- **Mainframe:** It continues to be a part of the IT estate, whether migrating off to a public/private cloud or modernizing on premises. Interestingly, many organizations felt their mainframes could be a cost-effective, secure, and sustainable component of their future AI infrastructure landscape.
- **Broadcom rationalization:** Customers want to take account of their VMware investments and understand the business, technology, and operational impacts of alternative solutions whether they include re-signing Broadcom license agreements, leveraging public cloud offers, or moving to alternative solutions. All three scenarios will have significant operational, financial, and skills/resources impacts that organizations will need to carefully consider. As of publication of this study, most organizations are still evaluating options, with very few making significant moves.
- **AI-ready infrastructure:** While not explicitly measured in this study, the demand for AI and GenAI is increasing and will accelerate hybrid cloud IT and multicloud spending. The need for professional services to help build a use case and define hybrid IT strategies and deployment models for public and private infrastructure is still in its infancy, but organizations want to begin the conversation now, so they will be well positioned to take advantage of the opportunity when the use case, market conditions, and economics are right (see Figure 3).

FIGURE 2

Top Services Required for Meeting Business, Technology, and Operational Objectives

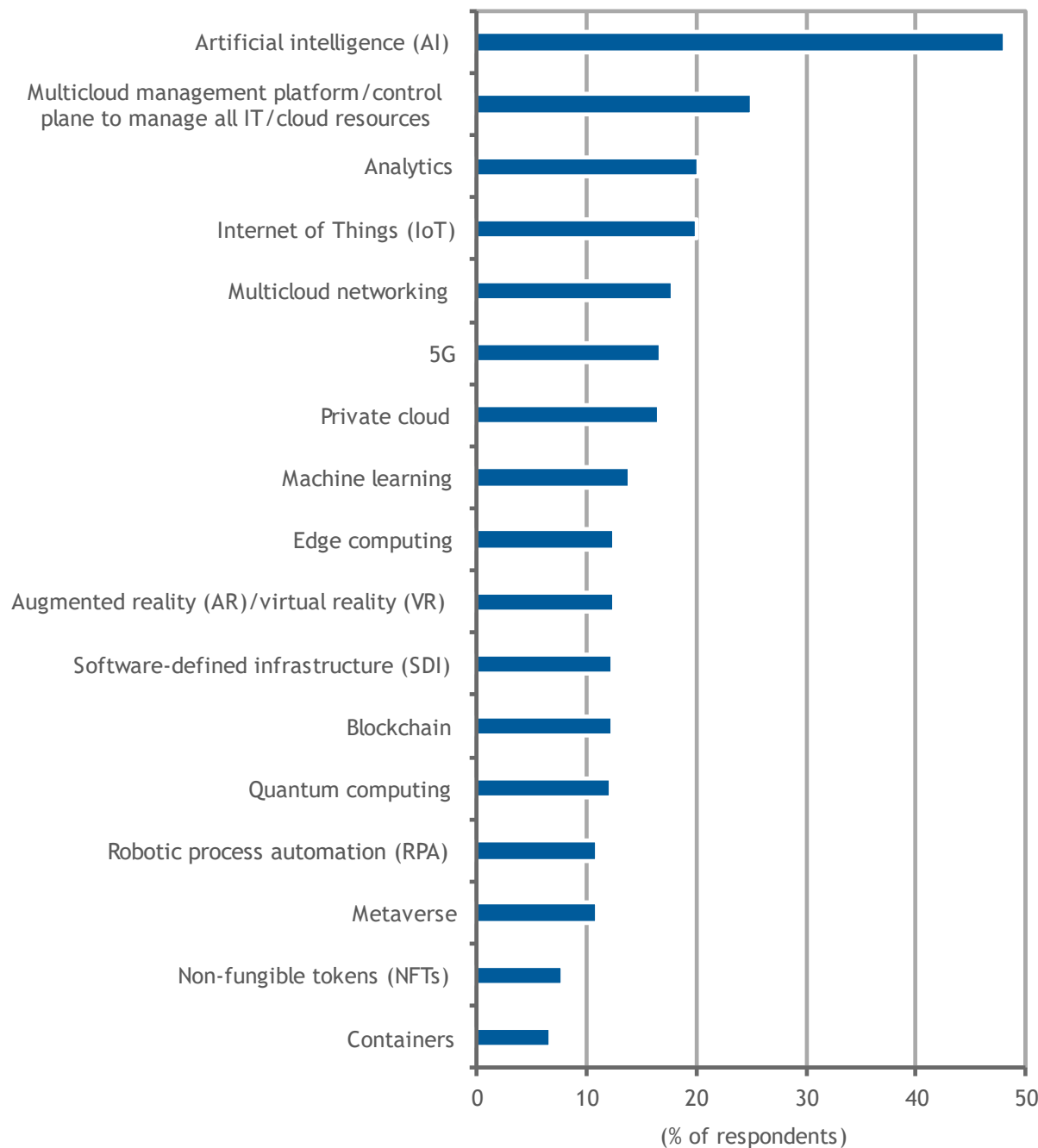


n = 3,221

Source: IDC's *ServicesPath Survey*, January 2025

FIGURE 3

Key Innovative Technologies That Organizations Require Expertise for from Their Services Partner in the Next Two to Three Years



n = 3,221

Source: IDC's *ServicesPath Survey*, January 2025

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC collected and analyzed data on 12 vendors and IT services providers for this IDC MarketScope for worldwide hybrid IT infrastructure consulting and integration services assessment. To determine the group of participants for analysis in the IDC MarketScope, IDC utilized the following set of criteria:

- **Inclusions:**

- Global scale: Three of four geographies (i.e., North America, Latin America, EMEA, APAC)
- Revenue: \$60 million
- Hybrid IT infrastructure consulting and integration services offering:
 - Full suite of consulting and integration offerings
 - Technologies included in the solution (not an exhaustive list as others may be included):
 - Compute
 - Storage hardware (HW)/software (SW)
 - Virtualization/containers
 - Control planes
 - Mainframes
 - Deployment models supported:
 - Traditional
 - Dedicated cloud on premises
 - Dedicated cloud off premises
 - IaaS
 - Compute and storage infrastructure as part of an edge use case
 - Life-cycle services activities (not limited to the following):
 - Consulting/advisory: Strategy; planning; cost optimization; infrastructure, skills, and process assessments; architecture and design; adoption; and optimization
 - Integration: Project management, integration, implementation, test/debug, configuration, migration, and test/validate

- **Exclusions:**

- *Not* included in this study: support services, managed services, network consulting and integration services, workload refactoring and/or modernization, platform as a service (PaaS), and software as a service (SaaS)

- Networking, a critical component of hybrid IT that is evaluated separately (For more information, see *IDC MarketScape: Worldwide Network Consulting Services 2024 Vendor Assessment*, IDC #US52056924, May 2024.)

ADVICE FOR TECHNOLOGY BUYERS

- **Understand that tools and processes matter.** This study highlights many of the investments that services firms are making in their tools, frameworks, processes, and people to ensure insightful consulting and service delivery capabilities. Ask questions and dig deeper into the tools and frameworks presented as well as the deliverables you will receive to ensure they provide the actionable insights you require to meet your goals without overcomplicating the process.
- **Assess everything.** You can't manage what you can't measure. Advancements in assessment tools coupled with telemetry allows services firms the ability to quickly discover and assess your *as is* environment. Take advantage of all relevant assessment services that extend across technology, people, operations, and processes. This will allow you to develop an effective plan to drive efficiencies and cost savings and improve processes.
- **Note that communication is critical.** Change is constant, and teams and personnel can be dynamic in delivery teams. Establish a weekly cadence with project and/or customer success managers that is supported with documentation to ensure that everyone is on the same page and minor adjustments do not become major realignments leading to scope creep, overruns, and project delays. And more importantly, innovation and new ideas happen when teams are in continuous communication.
- **Take a holistic financial point of view.** ROI and TCO models have been in use for many years, but the establishment of FinOps has effectively changed the way organizations look at IT investments across their organizations. According to *IDC MarketScape: Worldwide Hybrid IT Consulting and Integration Services 2023 Vendor Assessment* (IDC #US50498923, May 2023), FinOps best practices were relatively nascent in professional services portfolios; today, it is a standard best practice, and some enterprises have established their own FinOps internally. That said, enterprises stated that they still required assistance from their services providers to help them expand the practice more diligently across their organizations. Take advantage of such services.
- **Use this evaluation in your vendor selection process.** Use this IDC MarketScape as a tool not only to short-list vendors for hybrid IT consulting and integration services but also to evaluate vendors' proposals and oral presentations. For example, ask any of the vendors profiled how they are

building on the strengths identified and, likewise, how they are addressing their challenges. Make sure you understand where these players are truly differentiated, and take advantage of their expertise, industry focus, global reach, and investments in their own IP, tools, and resources. Tips about when to consider each provider are included in the Vendor Summary Profiles section.

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.

The vendor summary profiles in this study share customer feedback about their capabilities that were obtained through interviews with participants' customer references and IDC's 2025 *Worldwide Hybrid IT Consulting and Integration Services End-User Survey*.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Accenture Cloud First services deliver 161,000 cloud professionals to enable customers to meet their business, technology, and operational objectives, such as a modern digital core, self-funded transformation and full-stack FinOps, modern operating tools and processes, skills transformation, and elimination of technical debt by leveraging automation. Accenture goes to market with its ability to provide vertical industry and technology expertise to its customers on a global scale.

Accenture posits that a modern, agile digital core is the key to unlocking new opportunities for growth and innovation. In support of this, Accenture continues to develop and invest in its suite of capabilities designed to accelerate its clients' cloud and digital journeys. The suite is based on implementing a strong digital foundation encompassing Cloud First infrastructure, security, and composable integration and utilizing Accenture's Continuum Control Plane, which centralizes and standardizes hybrid cloud and multicloud management via tools, data, and insights. Other core tools and IP that Accenture leverages include myNav, a platform to deliver a full life cycle of cloud capabilities, processes, and methodologies to accelerate cloud adoption, and GenWizard, a platform with modular capabilities that utilize AI and GenAI to drive automation efficiencies across the life cycle. In addition, Accenture provides other capabilities including data and AI backbone services and digital platforms that can

enable its customers to achieve the full potential of cloud. From this digital foundation, Accenture provides industry and verticalized expertise to meet customer requirements.

Strengths

Accenture continues to expand its technology, industry, and operational expertise supported by its M&A strategy, ecosystem partnerships, and own IP. Study respondents found Accenture to have the ability to improve customer experience and compliance as well as allow faster time to market with hybrid cloud capabilities. An Accenture customer stated, "Accenture helped us with Cloud FinOps and is focused on telemetry, which enabled us to improve charging back to the business, and as a result, the business became more diligent." Another Accenture customer stated, "Accenture stands out for its ability to anticipate client needs and deliver customized solutions that go beyond expectations. Its integrated approach combines technological innovation with market expertise."

Challenges

While Accenture's customers rate the company highly, study participants felt that Accenture could help them ensure that they achieve successful migrations of applications and workloads and reduce capex. An Accenture customer stated, "More of an art than a science. The culture is hard to change, but spend more time communicating the why."

Consider Accenture When

Consider Accenture if you require a global technology partner that provides defined hybrid IT methodologies and best practices that are rooted with an industry focus.

Dell

According to IDC analysis and buyer perception, Dell is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Dell Services delivers holistic hybrid cloud and multicloud consulting and integration services regardless of the deployment location to ensure that Dell's customers have choice, flexibility, and control even as equipment manufacturers. Dell Services has 60,000 consultants and engineers around the world supporting a portfolio of offers across AI infrastructure, data and analytics, security, modern workplace, and multicloud. Its multicloud offerings focus on cloud platforms, operating models, automation and integration, and datacenter modernization.

Dell Services uses its Dell Services Consulting methodology that leverages its *as is/to be* processes, incorporating its own IP built on years of designing and implementing

customers' complex environments with customers' business, technology, and operational outcomes. Dell utilizes a suite of outcome accelerators, which are prescriptive services to help customers realize their hybrid cloud and multicloud objectives. Examples of these modular services are deployment, cloud platform customization and automation, organizational and operational change with service cost visibility, and managed services and educational services, which enable customers to quickly realize the benefits of their hybrid cloud and multicloud ambitions.

Strengths

Dell aims to accelerate its customers' hybrid IT infrastructure initiatives with continued investment in its portfolio capabilities and IP. Dell's customers spoke highly of the company's ability to accelerate digital transformation, improve employee efficiencies, and improve customer experience. A Dell customer stated, "We are using Dell Services for implementation, best practices, and efficiencies, and we extract a lot of benefits. We work with many Dell teams across our organization." In addition, another Dell customer said, "They gave me many comprehensive solutions."

Challenges

Dell was viewed favorably across the study, but some respondents felt less strongly about Dell's ability to reduce capex and operational costs.

Consider Dell When

Consider Dell if you require deep technical expertise and tight collaboration and communication.

Deloitte

According to IDC analysis and buyer perception, Deloitte is positioned in the Leaders category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Deloitte's global hybrid datacenter and cloud transformation (HDCT) practice provides a suite of services spanning strategy, design, implementation, ongoing management, and continuous optimization of infrastructure across multiple clouds (private and public). Deloitte's attention to customer pain points and requirements such as talent and skills, cost control, technical debt, security, compliance, and sustainability are considered essential inputs for developing a hybrid cloud strategy. Deloitte offers a suite of services to address these challenges that include datacenter optimization for facilities, observability and hybrid cloud management for monitoring and visibility, platform optimization, hybrid operations and cost optimization, AI infrastructure, and resiliency, as well as security, AI and data, and software engineering.

Deloitte continues to invest in and develop new offers and capabilities enhancing the HDCT practice, which includes Deloitte Engineering for software, platform, and product growth; IndustryAdvantage leveraging cloud, infrastructure, and GenAI coupled with vertical expertise; Integrated FinOps for modern financial operations; and GreenLight Solution and GreenSpace Tech for enhancing ESG initiatives.

Strengths

Deloitte's customers highlighted their partner's ability to collaborate and be a proactive partner and stated that the company's knowledge transfer capabilities are a big selling point. IDC survey respondents rated Deloitte favorably in its ability to accelerate digital transformation, reduce capex, and allow customers to bring services to market faster. One Deloitte customer stated, "They take the driver's seat and work with me to steer internal customers to action." Another customer stated, "One of the best from executive sponsorship on down. They are unique for strategy and execution across the board."

Challenges

While Deloitte was evaluated favorably by customers and survey respondents, some respondents felt Deloitte could highlight its abilities to improve operational efficiencies and risk mitigation capabilities.

Consider Deloitte When

Consider Deloitte if you are looking for a holistic partnership that brings technical expertise, defined methods, expert resources, and project management, as well as considers all customer pain points and provides solutions or offerings to address them.

DXC

According to IDC analysis and buyer perception, DXC is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

DXC transforms and manages infrastructure across traditional, private, public, and edge locations, offering a range of services to enable its customers' successful adoption of the right hybrid cloud and multicloud strategy. The company prides itself on running mission-critical operations across various industries, including transportation, capital markets and banking, manufacturing, consumer/retail, energy, insurance, and healthcare, ensuring stability and efficiency through consulting and integration services.

DXC's approach involves a comprehensive understanding of customer environments, leveraging a global delivery network and regional delivery centers to address regulatory

and compliance needs. The company emphasizes the importance of intelligent operations, using AI and automation to minimize incidents and optimize performance. Its transformation methodology, Precision Guided Modernization (PGM), can tailor strategies utilizing cross-functional inputs and assessments to accurately address customer requirements to enable customers to optimize resources, maximize efficiency, enhance security, improve compliance, and reduce costs across hybrid cloud and multicloud environments.

Strengths

DXC's focus on intelligent operations and an understanding of the customers' environments resonate with customers and survey respondents, as they rated DXC positively for its ability to increase the speed of deployment, improved management and monitoring of infrastructure, and improved visibility of infrastructure. One customer stated, "DXC focused on finding the right IT solutions to support our business — not just a public cloud-only approach." And a higher education customer stated, "DXC's ability to reevaluate my needs in projects and operations is excellent. Every semester we sat down to reevaluate the needs, and each time DXC's proposals were always aimed at meeting those needs and even improving processes."

Challenges

While survey respondents were favorable overall toward DXC, areas where DXC can focus include improved risk mitigation and management and helping customers improve compliance.

Consider DXC When

Consider DXC if you require a partner that is focused on providing the right hybrid IT solution for its customers through optimizing resources and maximizing efficiencies at a global and regional level.

HCLTech

According to IDC analysis and buyer perception, HCLTech is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

HCLTech's approach to hybrid cloud and multicloud emphasizes the importance of continuous modernization, agile infrastructure, and cognitive enterprise solutions. The company offers a comprehensive range of services, across consulting, design, build, and run, with a strong focus on sustainability, security, and change management. HCLTech's is committed to creating competitive advantages for clients through industry

expertise and productivity enhancements while enabling their customers to achieve ESG compliance, create new revenue streams, and reinvent business models.

HCLTech's Digital Foundation Services (DFS) is one of HCLTech's three core segments (Digital Business Services and Digital Process Operations are the other two), which is the cornerstone for the customers' digital transformation journeys that focus on automation-led infrastructure and next-generation AI. DFS provides frameworks that accelerate transformation at scale, consulting services that address personas and key requirements, and investments in expertise, tools, and IP that deliver standardized approaches and tested methodologies to help customers accelerate their hybrid cloud and multicloud strategies successfully.

Strengths

HCLTech's DFS was rated positively by survey respondents for its ability to deliver increased business agility, expansion into new geographies and markets, and improved customer experience. As one HCLTech customer stated, "The workshops, technologies, and programs presented were adapted to our needs, and their staff always guided us well," and another said, "Very good; delivered exactly what it promised."

Challenges

Study respondents praised HCLTech favorably across the study but felt less strongly regarding HCLTech's ability to deliver improved operational efficiencies and visibility across infrastructure.

Consider HCLTech When

Consider HCLTech if you require a partner that has made significant investments in automation and AI to transform the service delivery experience while enhancing consulting capabilities to meet customers' business, technology, and operational needs.

HPE

According to IDC analysis and buyer perception, HPE is positioned in the Leaders category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Hewlett Packard Enterprise (HPE) Service's approach to hybrid IT includes leveraging AI for advisory services, complex migrations, and automation to enhance efficiency and reduce costs. Sustainability is a significant focus, with innovations aimed at reducing carbon footprints in datacenters and workloads. HPE's strategy involves both organic growth and strategic acquisitions (e.g., Morpheus) to enhance the company's multicloud capabilities. HPE Services addresses customer challenges through AI-driven IT platform transformations, modernization via multicloud and hybrid cloud solutions,

and simplifying complex IT landscapes. HPE's GreenLake cloud platform plays a central role in these efforts.

HPE Services utilizes a suite of frameworks, platforms, and tools to guide, design, implement, adopt, and optimize its hybrid cloud and multicloud strategies, including the overarching Edge-to-Cloud Adoption Framework (E2CAF) and the newly launched Advisory Hub for a consolidated view of a customer's *as is* and *to be* environments. Other tools and frameworks include the Right Mix Advisor (RMA) for workload placement, Cybersecurity Analysis Report, rapid migration tools, and the Energy and Emissions Reporting tool, to name a few. HPE's broad portfolio, global footprint, and strong partnerships position the company to continue addressing complex customer challenges in the hybrid IT landscape. And as a trusted advisor, HPE Services is continuously evolving its portfolio to meet market demands and customer needs.

Strengths

HPE Service's investment in the company's methodologies and delivery capabilities was highlighted by respondents' satisfaction with the company's ability to increase customers' speed of deployment and business agility and reduce capex through the use of HPE GreenLake. As one customer stated, "Thorough information when we needed it: licensing, discovery, features, etc. Excellent management and timelines — and they can adapt as needed." And another said, "... deep technical expertise, customized solutions, global and regional support, and proven methodologies to scale up any business powerfully."

Challenges

HPE Services was viewed favorably across the study, but respondents felt less strongly about its ability to deliver digital transformation and improved compliance.

Consider HPE When

Consider HPE if you require holistic insights and expert guidance to make informed decisions for your hybrid IT initiatives, coupled with a partner that can adapt to market dynamics.

Kyndryl

According to IDC analysis and buyer perception, Kyndryl is positioned in the Leaders category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Kyndryl was formed in late 2021 through the spin-off of IBM's infrastructure services business. The company has leveraged 30+ years of business and IT experience while creating and defining its own best practices, capabilities, methodologies, and culture.

Kyndryl Consult presents its services proposition as "pragmatic modernization" that emphasizes continuous innovation and security. Kyndryl Bridge is an integration bus that aggregates and correlates data from across the IT estate (traditional, private, or public) as well as its managed services and applies AI to bring actionable insights to its customers. Kyndryl Bridge is a platform that supports advisory, implementation, and management services, enabling customers to maximize value and drive transformation. And Kyndryl Vital is an open, AI-driven, and human-centered framework wherein Kyndryl and its customers uncover, define, and solve complex IT and business challenges.

The Kyndryl Integrated Digital Enterprise Advisory (IDEA) framework spans IT strategy and transformation and encompasses enterprise architecture; sustainability, ESG, and FinOps; and program and change management to ensure successful hybrid IT adoption. Kyndryl's approach to modernization includes understanding the requirements for workloads driven by business, skills, and technical challenges; selecting the best-for-purpose platforms; optimizing the infrastructure; modernizing the applications; and integrating cloud-native services. The company emphasizes the importance of a consultative approach, continuous innovation, and the use of AI and automation to enhance service delivery.

Strengths

Kyndryl's ability to understand the customers' business objectives coupled with the company's capabilities for insights across the IT estate was viewed favorably among customers and study participants who rated Kyndryl highly for its ability to increase business agility, accelerate speed of deployment, and improve compliance. A Kyndryl customer stated, "Recommendations are based on deep understanding of our business through weekly meetings," and another customer found Kyndryl to be "progressive, reliable, modern, and efficient."

Challenges

While respondents rated Kyndryl favorably in this study, they felt less strongly about Kyndryl's ability to migrate applications, workloads, and infrastructure and the ability to lower operational costs.

Consider Kyndryl When

Consider Kyndryl if you want to improve operational processes and capitalize on automation that is in lockstep with business priorities.

Lenovo

According to IDC analysis and buyer perception, Lenovo is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Lenovo's Solutions & Services Group (SSG) — launched in 2021 in support of the company's product portfolio across end users, enterprise datacenters, and IoT and cloud — provides a suite of services including cloud advisory; data advisory; workload, database, and storage migration; datacenter consolidation; private cloud provisioning; multicloud provisioning; multicloud convergence; and the newly launched hybrid AI consulting and integration services. Lenovo services are standardized on Lenovo's five-stage methodology, which includes discovery/advisory (utilizing tools and intelligence), deploy and scale (which utilize the Lenovo AI Fast Start service), support management, and sustainable refresh. These services are designed to meet customers where they are on their journey, allowing them to procure services as they mature.

Lenovo leverages proven methodologies, tools, templates, and processes such as the Lenovo xIQ Cloud platform to support the full life cycle of cloud build, migrate, use, and operate. Lenovo xIQ Cloud is an integrated service delivery platform that enables organizations to optimize workloads and infrastructure in preparation for hybrid AI across technology areas such as containerization, microservices, AIOps, and platform management. Additional tools include OneIQ for infrastructure assessments and CAST for application-level assessments. Lenovo has significantly invested in its portfolio globally over the past three or more years, with a focus on continuing to build services that accelerate its customers' hybrid cloud, multicloud, and AI cloud initiatives.

Strengths

Lenovo's investments in the company's tools, processes, and methodologies were reviewed positively among customers and study respondents, highlighting the ability of the company to improve digital infrastructure and increase visibility of infrastructure and enabling its customers' business agility. A Lenovo customer stated, "Lenovo offered significant improvement in all negotiated areas of our business and did exactly what we expected within our price and agreed timing." And another customer stated, "The goals that we had were achieved when working with them; we are able to have their support at all times, and we are operational and functional and more efficient because of their services."

Challenges

Study respondents felt very favorable toward Lenovo's services but felt less strongly in the company's ability to provide improved customer experience and compliance.

Consider Lenovo When

Consider Lenovo if you require a global partner with technical expertise and an eye on future hybrid AI solutions, such as designing AI-ready infrastructure and platforms.

NTT DATA

According to IDC analysis and buyer perception, NTT DATA is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

NTT DATA fully integrated its consulting and integration capabilities across NTT DATA and NTT Ltd. in 2022, allowing the company to deliver a comprehensive approach to hybrid IT by leveraging its global consulting resources to provide end-to-end transformation services. NTT DATA's success in managing complex client environments, starting from initial strategy, discovery, and assessment to implementation and management, underscores the importance of understanding client culture and business goals to deliver tailored solutions that enhance agility and performance.

NTT DATA delivers hybrid IT infrastructure consulting with an emphasis on security, cost optimization, and innovative technology integration. The company's ability to adapt to client needs and provide strategic guidance is highlighted in the approach to managing workloads, leveraging AI, and ensuring comprehensive cybersecurity measures. Utilizing a suite of defined and repeatable methodologies, processes, and frameworks such as NTT DATA's Unified Cloud Adoption Framework, cloud management and operations, and FinOps practice ensures that the company's clients are maximizing their investments in hybrid cloud and multicloud across their technology estate.

Strengths

NTT DATA's focus on cost optimization and technology expertise coupled with the company's managed services capabilities resonates with customers, as study respondents rated NTT DATA favorably for its ability to help them reduce capex, improve operational efficiencies and processes, and increase business agility. One NTT DATA customer stated, "Their strategic consulting with advanced technologies [allows us] to drive digital transformation," and another customer stated, "Always exceeding our expectations — and appreciating much of your work."

Challenges

While the study respondents reacted favorably to NTT DATA's capabilities, they would like the company to increase its ability to help them increase their speed of deployment and improve employee efficiency.

Consider NTT DATA When

Consider NTT DATA if you want a global partner that can provide technology expertise across hardware and software and managed services and has a keen eye on cost, security, and sustainability as part of its DNA.

TCS

According to IDC analysis and buyer perception, TCS is positioned in the Leaders category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

TCS' comprehensive suite of hybrid cloud and multicloud consulting and integration services span consulting, assessments, design, implementation, migration, modernization, and management as well as next-generation services supported by proprietary products, platforms, accelerators, and strategic partnerships. The company offers a range of professional services including cloud service provider evaluation, cloud strategy, road map and business case definition, skills transformation and FinOps, and cloud optimization as part of its full-stack cloud offering.

TCS has significant investments in its AI-powered tools and platforms such as hybrid cloud accelerator and TCS Cognix, an end-to-end IT infrastructure service across datacenter, workspaces, and network and service management; Clouconomy for real-time observability; and Cloud Exponence providing automated multicloud management and cost optimization. These platforms and tools are part of TCS' Cloud 3.0 vision framework, which enables clients to efficiently adopt, manage, and optimize their hybrid IT environments with TCS Enterprise Cloud and multicloud offers.

Strengths

According to study respondents, TCS' investments in the company's AI-powered tools and platforms have successfully helped customers reduce capex and opex for their hybrid IT environments as well as improved customer experience. One TCS customer stated, "They know us after 10 years and they know our environments and points" and "they are working collaboratively with our internal teams." Another customer said, "Implementation was done smoothly and there was a reduction in cost."

Challenges

TCS customers and study respondents overall felt positively about TCS' capabilities to achieve outcomes but felt less strongly about the company's ability to help them expand into new markets and geographies and accelerate digital transformation.

Consider TCS When

Consider TCS if you want a long-term partnership that works collaboratively with your teams and understands your environment and pain points in the context of your business, technology, and operational objectives.

Tech Mahindra

According to IDC analysis and buyer perception, Tech Mahindra is positioned in the Major Players category in this IDC 2025 MarketScape for hybrid IT infrastructure consulting and integration services.

Tech Mahindra utilizes an integrated approach to its hybrid cloud services, combining cloud infrastructure, application modernization, SaaS integration, packaged cloud ERP solutions, and data and AI solutions, which are underpinned by Tech Mahindra's Cloud and Hybrid BlazeTech Platform (CBT). The company also focuses on providing verticalized solutions to cater to specific industry needs, such as manufacturing, banking, financial services, telecommunications, and healthcare. Its offerings include a comprehensive range of services, from assessment and migration to disaster recovery and IT operations, supported by partnerships with major technology providers. The company offers end-to-end solutions that integrate cloud, data, and infrastructure services, including cost optimization and leveraging AI/GenAI to enhance digital transformation and improve operational efficiency.

Tech Mahindra has created multiple tools and platforms supporting its clients' hybrid IT initiatives including the BlazeTech platform that covers the entire cloud adoption journey, from advisory and consulting to platform engineering and ongoing operations. And Tech Mahindra's HybridNXT 2.0 is a holistic framework that enables services delivery across hybrid clouds, based on validated reference architectures, and considers a client's people, processes, and infrastructure. And the Managed Platform for Adaptive Cloud (mPAC), which is one of the modules in CBT, offers a unified view across all environments via a single console. Tech Mahindra addresses the evolving needs of the market, focusing on integrated cloud services and verticalized solutions and leveraging AI to drive digital transformation and operational efficiency.

Strengths

Tech Mahindra's tools and platforms were rated positively among study respondents in the company's ability to improve visibility across the infrastructure, increase employee efficiency, and more quickly expand into new markets. A Tech Mahindra customer stated, "Their operational tools and assessments are very effective to [help us] expand into new market areas of business." And another stated, "They are experts in the hybrid cloud, and their training is very good; they explain in detail."

Challenges

While study respondents rated Tech Mahindra positively across the study, they felt less strongly about its ability to bring services faster to market and improve compliance.

Consider Tech Mahindra When

Consider Tech Mahindra if you require a partner that has invested in the development of technologies, tools, and platforms for improving service delivery and insights for its clients' hybrid IT journey.

Wipro

According to IDC analysis and buyer perception, Wipro is positioned in the Major Players category in this 2025 IDC MarketScape for hybrid IT infrastructure consulting and integration services.

Wipro's hybrid infrastructure consulting and integration services are part of the FullStride Cloud Global Business Line. Wipro's FullStride Cloud initiative, which represents a significant portion of Wipro's revenue, acts as a comprehensive ecosystem orchestrator, integrating cloud consulting, infrastructure, and application services. FullStride Cloud's advisory and consulting services are aligned to the following critical customer needs: IT strategy and operations, cloud and infrastructure, IT optimization, and IT modernization. This approach is coupled with an understanding of customers' needs and aligning IT strategies with business goals, which utilizes a structured methodology leveraging Wipro IP involving discovery, evaluation, planning, advising, and transforming the clients' hybrid IT landscape.

FullStride Cloud's beginning-to-end capabilities, from advisory to managed services, highlight the ability to stabilize, modernize, and manage complex IT environments that align with business outcomes for clients. Wipro's investment in the company's tools and accelerators is designed to help customers accelerate their hybrid infrastructure initiatives. Tools and platforms include AI-Ready Platform for provisioning infrastructure and core software stack for the consumption of AI/GenAI workloads. Wipro IP and accelerators include Boundaryless Enterprise (BLE), a plug-and-play platform for IaaS, PaaS, and containers, and SLICE, an AI-powered cost and impact management suite of solutions. The company aims to leverage its deep expertise and partnerships to help clients navigate the complexities of modern IT landscapes and achieve their strategic hybrid IT objectives.

Strengths

Study respondents felt positively about Wipro's FullStride Cloud capabilities that help them achieve business, technology, and operational outcomes such as improved

infrastructure management and monitoring, improved visibility across all infrastructures, and improved customer experiences. A Wipro customer articulated, "They have evolved over our journey; they understand our business. Operational efficiency has improved. Innovation also has improved, and we are now using automation."

Challenges

Survey respondents felt positive about Wipro's FullStride Cloud capabilities but would like Wipro to help them with their ability to have faster time to market and increase employee efficiency.

Consider Wipro When

Consider Wipro if you want a responsive and flexible partner that understands your business and if its investment in tools allows you to accelerate innovation and operational efficiency.

Other Vendors to Consider

There are many services firms and vendors that have consulting and integration services offers to support their customers' hybrid IT infrastructure initiatives. While not all vendors and services firms are evaluated in this study, IDC lists a few additional resources for consideration. The following list of vendors is not exhaustive, but IDC finds their capabilities additive to the market landscape:

- Hitachi Vantara/Hitachi Data Systems
- Broadcom-VMware
- Cognizant
- Computacenter
- Logicalis
- Infosys
- IBM

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

Market Definition

IDC defines hybrid IT infrastructure services as consulting and integration services for compute and storage infrastructure across traditional IT, private on-premises, private off-premises, and public cloud deployments. This market includes the enterprise spend on professional services provided by either an infrastructure vendor, a systems integrator, and/or a cloud service provider or telco. The service engagements may be purchased discretely or as part of a larger IT contract. They do not include managed or support services but may lead to a managed or a support service contract.

Strategies and Capabilities Criteria

Tables 1 and 2 indicate each criterion and scoring element evaluated alongside a definition for strategies and capabilities, respectively. These elements are not weighted evenly; the criteria weighing columns provide insight as to which criteria are weighted more heavily.

TABLE 1**Key Strategy Measures for Success: Worldwide Hybrid IT Infrastructure Consulting and Integration Services**

| Strategies Criteria | Definitions | Weight (%) |
|------------------------------------|--|------------|
| Functionality or offering strategy | <ul style="list-style-type: none">▪ Excellence is defined by the ability to help customers create a simplified architectural model across all deployment locations▪ The framework can easily adjust to new market dynamics and customer requirements (e.g., maximizing Broadcom, anticipating AI infrastructure impacts)▪ Development of a control plane to allow for improved insight, operational efficiencies, automation, and management across all deployment locations | 31.00 |
| Service delivery strategy | <ul style="list-style-type: none">▪ Most service delivery tasks with high levels of automation for efficiency and repeatability▪ Defined processes and tools for globally consistent delivery across all deployment models | 19.00 |
| Customer satisfaction strategy | <ul style="list-style-type: none">▪ Life-cycle practices to expand and renew hybrid IT consulting and integration projects▪ Excellence defined by continuous re-engagement processes and with formalized engagement teams with defined roles to drive success | 25.00 |
| Pricing models | <ul style="list-style-type: none">▪ Ability to develop new pricing and consumption models that are aligned with customer needs | 7.00 |
| Innovation | <ul style="list-style-type: none">▪ Can clearly demonstrate a strategy for alliances, partnerships, and joint ventures (JVs) to expand offers | 5.00 |
| Employee strategy | <ul style="list-style-type: none">▪ Process to acquire new skills and talent to meet or exceed customer expectations | 9.00 |
| Growth | <ul style="list-style-type: none">▪ A defined plan to maximize growth opportunities across new geographies, markets, industries, and offers | 4.00 |
| Total | | 100.00 |

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Worldwide Hybrid IT Infrastructure Consulting and Integration Services

| Capabilities Criteria | Definitions | Weight (%) |
|------------------------------------|--|------------|
| Functionality or offering | <ul style="list-style-type: none"> ▪ Ability to clearly articulate defined offers for hybrid IT by deployment location ▪ Articulating defined processes for appropriate deployment locations based on customer requirements including applications and workloads, skills, cost, operational readiness, and alignment with business objectives ▪ A combination of best-of-breed tools, automated processes, and expertise to fully assess, plan, and deploy the <i>as is</i> and the <i>new to be</i> environment | 24.00 |
| Service delivery capabilities | <ul style="list-style-type: none"> ▪ Can demonstrate technical expertise globally with high levels of certifications across all partners ▪ Can demonstrate investments in a variety of tools, processes, and methods that utilize automation and AI/ML to enhance service delivery globally and meet customer requirements ▪ Superior execution as described by on time, on budget, meets promises, and maximizes value ▪ Open and continuous communication; leveraging various multiple channels ▪ Proposal scope, pricing, pricing models, and timeline that met our expectations | 27.00 |
| Customer satisfaction capabilities | <ul style="list-style-type: none"> ▪ Has best practices for customer success with investment in teams and processes to closely align with customers outcomes | 6.00 |
| Marketing | <ul style="list-style-type: none"> ▪ Can clearly articulate messages across business, technology, and operational benefits/outcomes ▪ Recognized and awarded excellence by peers and partners ▪ Has created thought leadership demonstrated at industry events and press ▪ Ease of navigation to hybrid IT consulting and integration services | 18.00 |
| Growth capabilities | <ul style="list-style-type: none"> ▪ Robust year-over-year revenue growth via organic or M&A activity | 5.00 |
| Employee capabilities | <ul style="list-style-type: none"> ▪ Innovative programs for hiring, skilling, and retaining employees with skills that customers require | 4.00 |
| Innovation capabilities/R&D | <ul style="list-style-type: none"> ▪ Can demonstrate R&D investments, JVs, partnerships, and alliances to create innovative offers | 4.00 |

TABLE 2

Key Capability Measures for Success: Worldwide Hybrid IT Infrastructure Consulting and Integration Services

| Capabilities Criteria | Definitions | Weight (%) |
|-----------------------|---|------------|
| Other | <ul style="list-style-type: none">Vendors meeting customer expectation of overall quality of services | 12.00 |
| Total | | 100.00 |

Source: IDC, 2025

LEARN MORE

Related Research

- Worldwide Hybrid IT Infrastructure Consulting and Integration Services Forecast, 2024–2028 (IDC #US52546424, August 2024)
- IDC MarketScape: Worldwide Hybrid IT Consulting and Integration Services 2023 Vendor Assessment (IDC #US50498923, March 2023)
- IDC's Worldwide Services Taxonomy, 2022 (IDC #US47769222, July 2022)
- IDC MarketScape: Worldwide Datacenter Transformation Consulting and Integration Services for Infrastructure 2020 Vendor Assessment (IDC #US46184020, May 2020)

Synopsis

This IDC study evaluates global vendors providing hybrid IT infrastructure consulting and integration services, highlighting the increasing need for modern, agile, and AI-ready infrastructures. It assesses vendors based on their capabilities and strategies to help enterprises design, implement, and optimize hybrid IT environments. The study underscores the importance of automation, AI/ML, and FinOps in achieving operational efficiency and competitive advantage, offering insights into vendor strengths and challenges and recommendations for technology buyers.

"To stay competitive in the evolving digital landscape, organizations must modernize their hybrid IT infrastructure and workforce to capitalize on the next wave of innovation," stated Leslie Rosenberg, research VP, Network Life Cycle and Infrastructure Services, 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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