

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

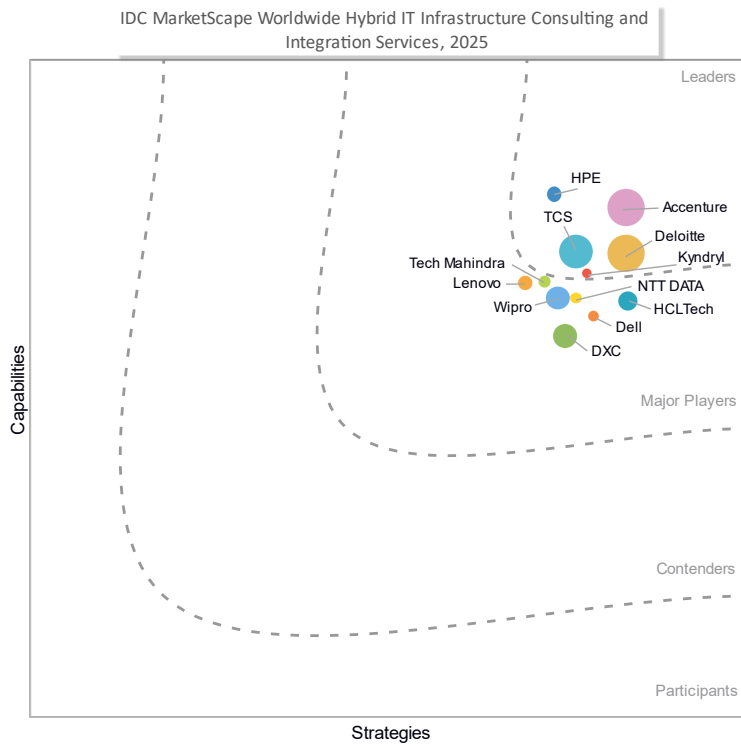
Leslie Rosenberg

THIS EXCERPT FEATURES KYNDRYL AS A LEADER

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.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Hybrid IT Infrastructure Consulting and Integration Services 2025 Vendor Assessment (Doc # US53312825).

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:

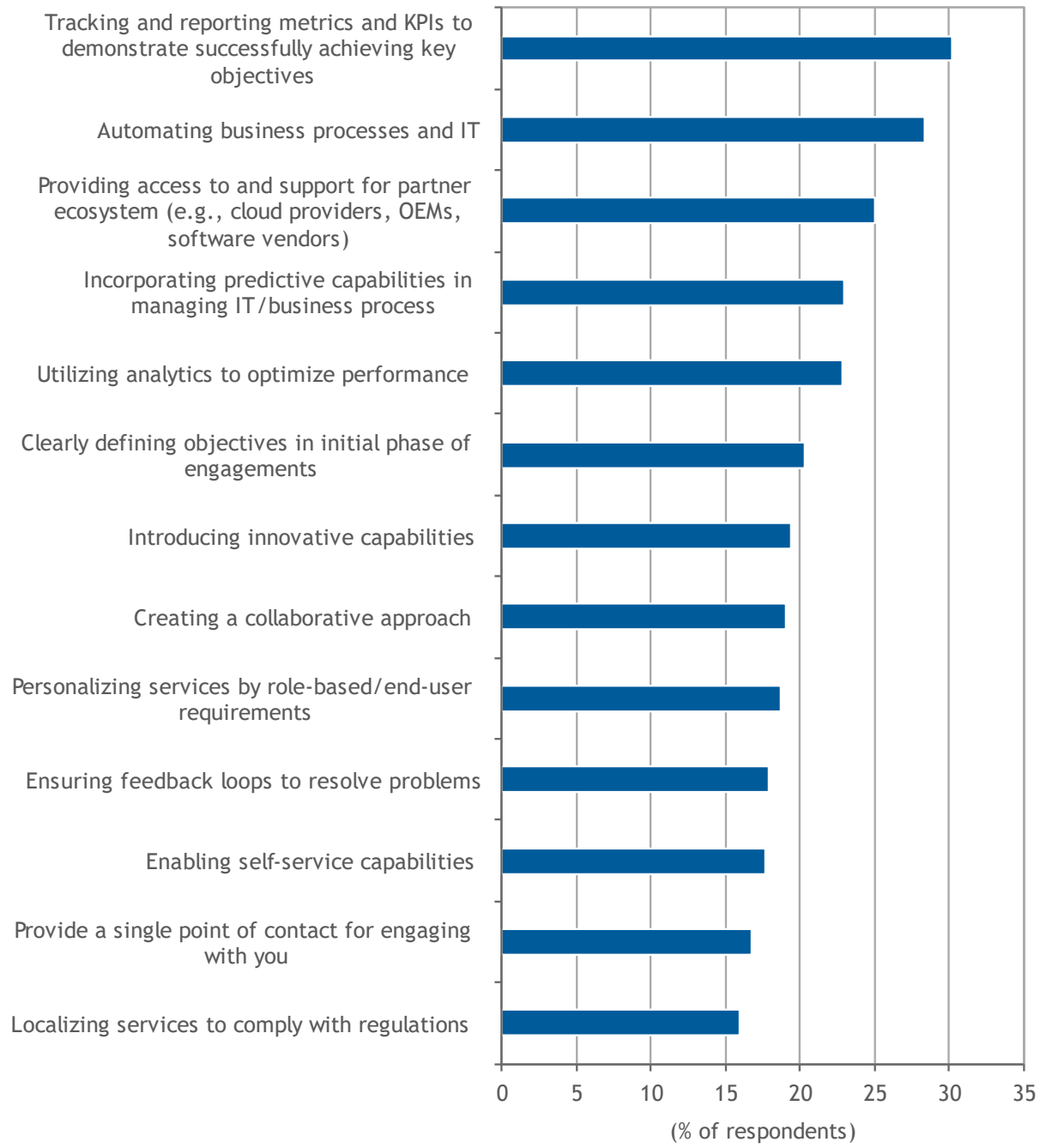
- **Full-stack value realization:** It includes best practices to maximize the return on investment (ROI) across all deployment locations. This is a holistic exercise incorporating ROI/TCO models, FinOps adoption, rightsized infrastructure and applications, new consumption models, technical debt reduction, 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

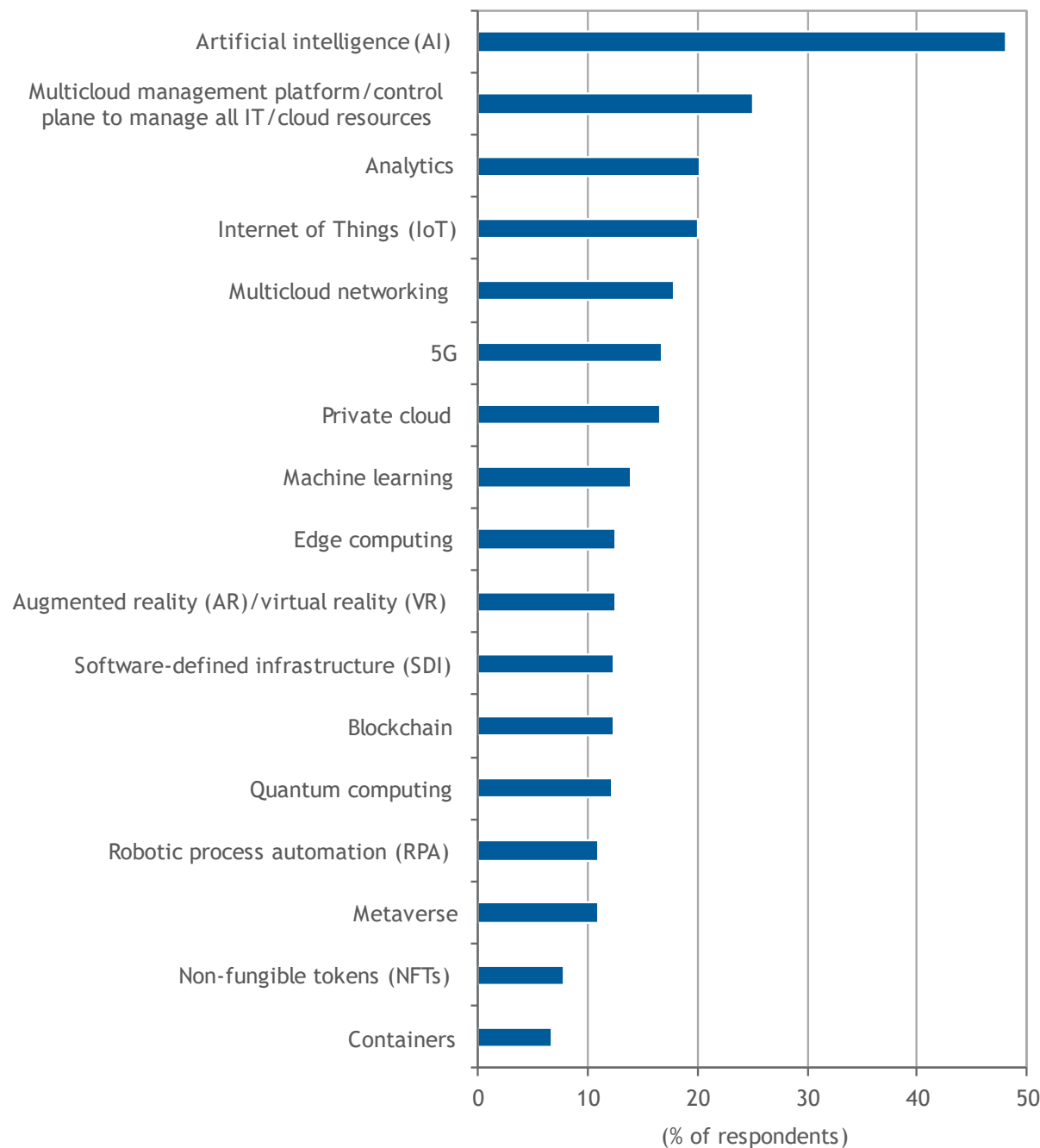


n = 3,221

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*.

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.

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.

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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