IDC MarketScape

IDC MarketScape: Worldwide Cloud Professional Services in the AI Era 2026 Vendor Assessment

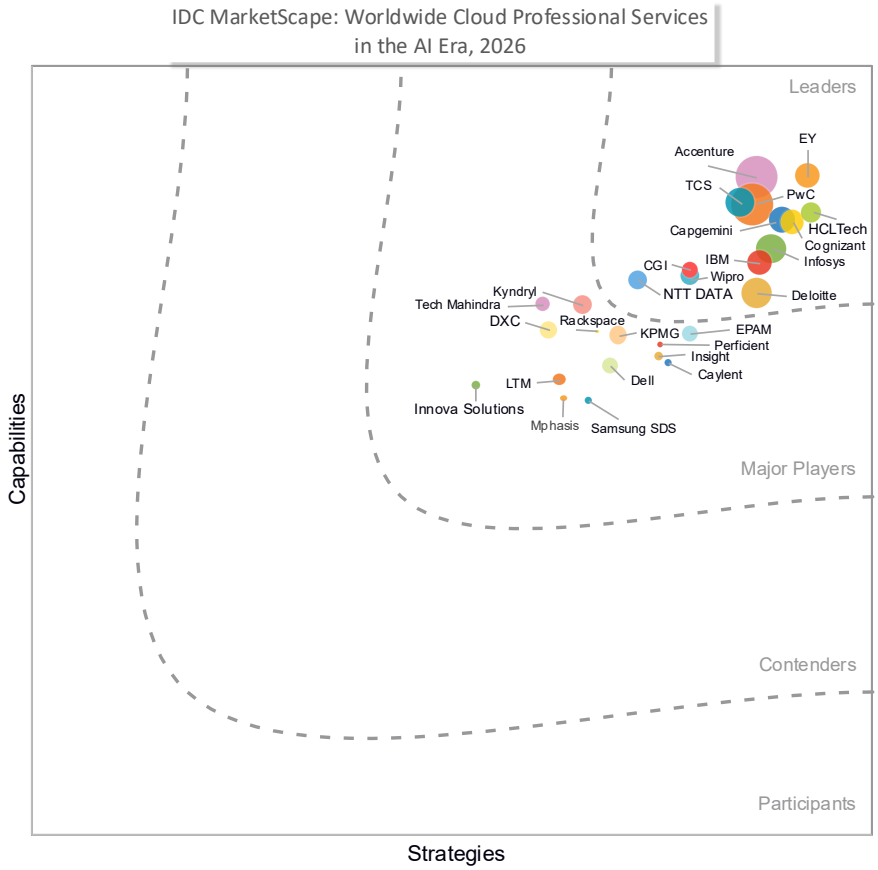
Jennifer Thomson Eren Eser

THIS EXCERPT FEATURES NTT DATA AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide cloud professional services in the AI era vendor assessment



Source: IDC, 2026

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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 Cloud Professional Services in the AI Era 2026 Vendor Assessment* (Doc #US54117426).

IDC OPINION

Buyers of cloud professional services in 2026 face a market that has been redefined by the rapid maturation of generative AI (GenAI) and the rise of agentic AI. What began two years ago as enthusiasm around large language models has evolved into board-level demand for measurable AI-driven business outcomes, and cloud is now positioned as the foundation for that ambition. A record 27 vendors were evaluated in this seventh biannual evaluation, reflecting the further democratization of cloud professional services capabilities and the continued expansion of provider portfolios into AI-native engineering, data modernization, and intelligent operations.

When buyers were asked which provider capabilities are most important to the success of a cloud professional services engagement, the highest-ranked attributes were execution oriented and outcome oriented rather than technology led. Buyers placed the greatest importance on the provider's ability to deliver measurable business outcomes and to execute projects on time and deliver results, which ranked jointly at the top, closely followed by strong technical expertise and the application of appropriate technologies and platforms. Providing high-quality talent and delivery teams remained important to buyers but ranked in the middle of the field rather than at the top, indicating that talent is treated as a necessary condition rather than a primary differentiator. Notably, the ability to leverage data, analytics, and AI effectively ranked among the lowest capabilities in this wave, suggesting that buyers currently prioritize dependable delivery over AI proficiency when judging engagement success.

In terms of the business priorities buyers rely on their cloud professional services vendors to help deliver, the top priority in this wave was improving efficiency and reducing costs by optimizing operations, followed by investment in IT and cybersecurity to build digital trust and by customer-centric processes that improve experience. AI-related priorities, including developing AI-enabled products and services and deploying AI to improve productivity and decision-making, ranked in the middle of the field rather than at the top, indicating that buyer intent around AI has not yet translated into top-ranked demand in this reference base.

IDC continues to recommend that buyers think about providers' expanding capabilities akin to a college graduate with a major and a minor and prioritize their needs accordingly but in

2026, the "major" is increasingly likely to be data and AI engineering, with cloud infrastructure modernization as the "minor."

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors are required to meet the following criteria to be included in this study:

- Have cloud professional services offerings
- A minimum threshold of the most recent 12 months available of IT project–based revenue of $550 million or greater and at least $35 million in each macroregion (Americas, APAC, EMEA) as recorded in IDC's Services Tracker, or at least $100 million in cloud professional services revenue and either at least two of the three macroregions or at least 1,500 dedicated resources to cloud professional services

ADVICE FOR TECHNOLOGY BUYERS

- **Be clear about the role cloud must play in your AI strategy.** The past 24 months have demonstrated that AI value is gated by data quality, platform readiness, and governance, not model availability. Decide up front whether your cloud spend is being directed primarily at AI enablement, cost optimization, or sovereign and regulatory resilience, and align provider selection accordingly. Many of the providers in this evaluation now claim end-to-end AI capability; the differentiator is which of those goals they have actually delivered against in production environments comparable to yours.
- **Weigh AI-model and hyperscaler ecosystem access as a real selection factor, but distinguish access from badges.** IDC's broader Agentic Enterprise Transformation 2026 buyer research shows that preferred access to frontier AI models and hyperscaler relationships is now among the most decisive factors buyers cite when choosing a strategic transformation partner, and that providers with ecosystem-orchestration strength are rated among the highest-performing on delivery. The same research shows narrowly defined partner certifications carry far less weight than demonstrated, production-grade use of that access. When a provider cites partner-tier status or hyperscaler awards, ask for the production engagement, the named use case, and the outcome it produced.
- **Make AI governance and FinOps inseparable.** Cloud governance was a rising priority in our 2024 evaluation; in 2026 it is table stakes, and it has merged with two adjacent disciplines: AI governance and FinOps for AI workloads. GPU consumption, token-level cost tracking, and model-routing decisions can swing project economics by an order of magnitude. Ask professional service providers to describe their tooling and policy frameworks for tracking AI consumption against business outcomes, and how those frameworks integrate with the broader cloud cost-management approach.

- **Push for outcome-based or gain-sharing contracts, but budget for the friction of getting there.** IDC's 2026 Agentic Enterprise Transformation buyer research found buyers want these models, yet there is 76–80% agreement across every friction point tested: internal procurement and governance make outcome-based contracts hard to structure, most providers don't yet offer them at the maturity buyers need, providers tend to favor the outcomes that suit them, and buyers themselves struggle to define the outcomes to tie to fees. This means both sides need to invest in scoping and governance before signing, not after.
- **Plan for agentic operating models, not just agentic pilots.** Most buyers IDC interviewed have run agentic AI proofs of concept; the harder problem is redesigning processes so that AI agents, human workers, and legacy systems coexist. Look for professional service providers that combine business consulting depth with engineering muscle and a clear point of view on human-in-the-loop design, change management, and the operational telemetry needed to keep agentic systems trustworthy at scale.
- **Don't assume operating-model readiness matches ambition.** Across the eight foundational capabilities IDC tracks for agentic transformation (strategy, governance frameworks, data foundations, cloud/integration architecture, monitoring and audit, human-agent operating models, AI centers of excellence, and workforce training), only 23–28% of the 885 buyers IDC surveyed report each capability as already in place and operational; the rest are still piloting or planning within the next 12 months. Ask any provider you're evaluating which of these capabilities they can stand up for you today versus which they are still building alongside you.
- **Evaluate sovereign cloud and data residency capabilities seriously.** Regulatory developments in the EU, India, the Middle East, and the United States have made sovereign cloud and sector-specific data residency a meaningful selection criterion. Several providers in this evaluation have invested significantly in sovereign cloud offerings, partner ecosystems, and local delivery centers; others have not. Match the provider's sovereign posture to your jurisdiction and risk profile.
- **Add new insights to your vendor selection process.** Use this IDC MarketScape as a tool not only to short-list vendors for cloud professional services bids but also to evaluate vendors' proposals and oral presentations. 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, particularly with respect to industry-specific AI accelerators, data engineering depth, and the maturity of their agentic platforms. 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.

NTT DATA

After a thorough evaluation of its offerings and capabilities, IDC has positioned NTT DATA in the Leaders category in this 2026 IDC MarketScape for worldwide cloud professional services in the AI era.

NTT DATA delivers cloud professional services through a large global practitioner base concentrated more heavily in Asia/Pacific than in EMEA or the Americas, reflecting its heritage and operational history. The firm's central capability is a full-stack proposition that extends from datacenter and network infrastructure up through the application and systems layer to digital business processes, drawing on the connectivity and datacenter heritage of the broader NTT group to offer end-to-end transformation.

NTT DATA takes clients from cloud strategy and readiness through migration and modernization to ongoing managed optimization and governance, industrialized through a small number of interconnected models, including Agentic AI Studio, a governed environment for deploying reusable task-oriented agents across migration, SRE, FinOps, DevSecOps, and data modernization, and the Private AI Factories Center of Excellence for full-stack, sovereign AI infrastructure. Application modernization is structured around a continuous Run-Transform-SRE model rather than point-in-time migration, embedding agentic AI across the development life cycle.

NTT DATA's hyperscaler partnerships have strengthened materially, with strong year-over-year growth in its Microsoft and Google Cloud alliances. The AWS relationship deepened through selection as a European Sovereign Cloud launch partner, early participation in the AWS Agent Path program, and the acquisition of Zero&One, a Dubai-based AWS partner that strengthens reach across the Middle East and North Africa. The firm holds a large certification base across AWS, Google Cloud, Azure, and Oracle Cloud Infrastructure, with notable depth in Azure specializations.

Strengths

NTT DATA's core strengths are its global scale and the depth of its hyperscaler relationships, reinforced by the recent acceleration in Microsoft and Google Cloud alignment and strong AWS competency coverage across several priority industries and use cases. The firm reports a high rate of client re-engagement following initial contracts, consistent

with its trust-based, long-term account model. Its cost-benefit analysis and pricing model flexibility are notable strengths.

The combination of Agentic AI Studio, a governed environment for deploying task-oriented agents, and the Private AI Factories model is a capability, addressing both the application-layer design of agent-based solutions and the secure, sovereign infrastructure required to run them at scale, backed by early recognition from both AWS and Microsoft in agentic AI delivery programs. Its composable industry cloud service engines, with prebuilt accelerators across financial services, manufacturing, and public sector, combined with sovereign cloud capabilities such as air-gapped, policy-led architectures and its AWS European Sovereign Cloud launch-partner status, address regulated and data-sovereign buyer segments that generalist providers tend to underserve. Its broad award portfolio across major hyperscaler and technology partners provides further evidence of recognized execution across the ecosystem.

Challenges

NTT DATA's delivery footprint and revenue remain more concentrated in Asia/Pacific than in the Americas and EMEA, which can affect reference density and industry-vertical depth outside its core geographies. NTT DATA's market recognition still leans toward infrastructure, advisory, and migration work rather than full application transformation, suggesting the firm has an opportunity to build greater visibility for its custom development, application management, and engineering capabilities so that clients see it as a full life-cycle transformation partner rather than primarily an infrastructure and migration one.

On agentic AI specifically, production maturity should be validated. The full-stack, end-to-end message, while a genuine capability, is one buyers have historically resisted out of vendor lock-in concerns, and NTT DATA must continue educating prospects on the value of integrated network, datacenter, and cloud delivery to convert the positioning into wins.

Consider NTT DATA when

Consider NTT DATA when you want a provider with global scale, a commitment to long-term client relationships, and the depth to manage complex multicloud and hybrid environments across regulated industries. It is particularly well suited to organizations whose requirements span network, edge, and cloud convergence, where the group's connectivity and datacenter heritage is a meaningful advantage, and to financial services, insurance, and public sector buyers needing sovereign cloud capabilities backed by hyperscaler launch-partner and competency credentials. It is also a strong fit for enterprises seeking an industrialized agentic AI delivery model, and for organizations in Asia/Pacific and EMEA that value NTT DATA's local delivery depth and partner recognition.

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

The cloud professional services market includes elements from four of IDC's services foundation markets: IT consulting, custom application development, systems integration, and network consulting and integration. Examples of specific cloud professional services include cloud maturity assessments, IT strategic planning, cloud-native development using PaaS, the setup of modern development environments, modernization efforts, migrating and integrating legacy systems with cloud applications and infrastructure, integrating disparate cloud applications and platforms, and planning, designing, or building local and wide area networks to accommodate cloud services.

LEARN MORE

Related research

- *From AI Maturity Gap to Service Pipeline: The Opportunity for Service Providers — Insights from IDC's MaturityScape Benchmark Survey, May 2026* (IDC #EUR154810526, August 2026)
- *Agentic AI in Cloud Professional Services: From Assisted Delivery to Orchestrated Autonomy* (IDC #EUR154684826, July 2026)
- *The Evolution of Cloud Professional Services: Navigating the Next Horizon — Agentic AI, Delivery Reinvention, and the Shift to Outcome-Centric Value* (IDC #US53408826, July 2026)
- *The Impact of Agentic AI on Professional Services: A Playbook for Services Providers* (IDC #US53339226, May 2026)
- *Agentic AI's Impact on Services* (IDC #US54505125, May 2026)
- *AI's Four Dimensions of Impact on Digital Business Professional Services: Strategy, Delivery, Commercial Model, and Operating Model Transformation* (IDC #EUR154505526, May 2026)

Synopsis

This IDC study represents a vendor assessment of the 2026 cloud professional services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate that vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide cloud professional services market and reflects the dramatic reshaping of buyer expectations driven by generative and agentic AI. A record 27 vendors were evaluated, including six new entrants — Caylent, Infosys, Innova Solutions, Insight, Tech Mahindra, and Wipro — reflecting both the maturation of inclusion thresholds and the broader expansion of cloud professional services capability across the global services landscape.

"Cloud has shifted from being the destination of a transformation to being the foundation of a transformation. In 2026, the question for buyers is no longer 'how do I move to the cloud' but 'how does my cloud estate let me deploy and govern AI agents that materially change how my business runs' and the providers that can answer that question convincingly are the ones that will lead the next decade of this market," said Jennifer Thomson, vice president, Research at IDC.

ABOUT IDC

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

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