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MARKET NOTE

NTT DATA Infrastructure Solutions Are a Cornerstone of Its AI Strategy

Chris Barnard   Leslie Rosenberg

EXECUTIVE SNAPSHOT

NTT DATA's AI strategy is structured around three pillars: developing AI-native offerings, infusing AI into existing solutions, and enabling AI-powered business operations. The company emphasized the importance of modernizing infrastructure for AI-driven growth with investments in its Infrastructure Solutions unit.

Key takeaways

- **Architecting the AI future** by addressing multiple infrastructure bottlenecks that enterprises face as they move toward wider AI adoption (These bottlenecks span architecture, networking, security, data, and storage.)

- **AI requiring a significant infrastructure refresh** since the commercial internet (The Infrastructure Solutions team is therefore aligning its offerings with AI inferencing requirements while embedding cybersecurity across every layer of the infrastructure stack.)

- **AI-powered, platform-led approach** across areas such as service delivery, licensing, and customer success, reinforcing the importance of scale, repeatability, and operational efficiency

IN THIS MARKET NOTE

This document looks at NTT DATA's strategy and execution in the wake of the recent (4Q25) analyst event, coupled with an IDC all-day session at the NTT DATA Bangalore global delivery center, with meetings with senior executives in the organization. This document specifically focuses on the Infrastructure Solutions unit, which is a key pillar of the organization's AI strategy.

Infrastructure modernization is central to an AI strategy

The Infrastructure Solutions unit is one of the foundational groups of NTT DATA, along with Applications and Business Process Services, Cloud and Security, Business Solutions, and Data Centers, Connectivity, and Digital Workplace Services. It is noteworthy that this foundational unit, led by Dilip Kumar, has changed its name recently, from Technology Solutions to Infrastructure Solutions. This change is more than cosmetic and reflects a clear affirmation that infrastructure has reemerged as one of the most strategic and competitive areas in the broader services market.

In his keynote at the analyst event, CEO and Chief AI Officer, Abhijit Dubey, set the scene by stating that "infrastructure is sexy again." He outlined how NTT DATA targets an ambitious 25x expansion of its total addressable market (TAM) through its AI strategy — by capturing the broader opportunity of AI-driven business operations transformation. The company's AI strategy is structured around three pillars: developing AI-native offerings, infusing AI into existing solutions, and enabling AI-powered business operations.

NTT DATA emphasized the importance of modernizing infrastructure for AI-driven growth. As IDC saw at the analyst event and in meetings with Infrastructure Solutions executives, NTT DATA focuses on three critical themes:

- **Architecting the AI future** by addressing multiple infrastructure bottlenecks that enterprises face as they move toward wider AI adoption (These bottlenecks span architecture, networking, security, data, and storage.)
- **AI requiring a significant infrastructure refresh** since the commercial internet (The Infrastructure Solutions team is therefore aligning its offerings with AI inferencing requirements while embedding cybersecurity across every layer of the infrastructure stack.)
- **AI-powered, platform-led approach** across areas such as service delivery, licensing, and customer success, reinforcing the importance of scale, repeatability, and operational efficiency

Driving outcomes through accelerated technology adoption, consumption, and service innovation

Aditya Afzulpurkar, global head of Services, Infrastructure Solutions, outlined how this organization has transformed its traditional portfolio of consulting, professional services, and traditional support services into an AI-powered portfolio consisting of the following:

- **Infrastructure Advisory:** Guiding organizations to prepare their infrastructure for AI
- **Strategic Sourcing Services:** Helping select and globally source the right technology solutions

- **Professional Services:** Deploying AI-ready infrastructure and integrating with multiple OEM clouds, leveraging AI to improve client satisfaction
- **Software-Defined Infrastructure Services (SDIS):** A proactive, AI-powered service that focuses on outcomes such as infrastructure availability, risk reduction, cost optimization, and ESG optimization, instead of traditional support service-level agreements (SLAs)
- **Adoption Services:** Bridging the gap between technology implementation and value realization
- **One Enterprise Agreement Services:** Aiming to simplify software procurement, consumption, and life-cycle management for clients

NTT DATA's focus will be to open the aperture of how customers consume legacy service models that focus on basic service-level agreements, which offer a narrow set of key performance indicators. This narrow scope often traps organizations into maintenance cycles rather than expanding innovation. As a result, NTT DATA's AI-powered SDI Services have been developed to help infrastructure leaders break out of these maintenance cycles and focus on outcomes through real-time infrastructure insights. As part of this service, NTT DATA has launched a conversational SDI Services agent that helps:

- Gain a comprehensive view of license usage to increase consumption.
- Track outcome success metrics to ensure continuous improvement.
- Optimize infrastructure with real-time debt analysis, sustainability planning, and operational risk insights.
- Track SLAs and drive faster remediation with intelligent escalation management.

By following this approach, NTT DATA enables its clients to focus on outcomes such as multivendor infrastructure availability, risk reduction, cost optimization, and improvements in sustainability scores. At the same time, an agentic AI approach will increase client experience and drive employee productivity.

On the professional services front, the transformation continues as AI agents focus on improving Site Survey lead times and providing real-time project updates to clients. This AI-driven experience is a differentiator for NTT DATA coupled with its global IP and scale developed from 35 years of executing on large, complex projects for clients.

Service delivery execution will be fundamental to success

The evolution of the NTT DATA Bangalore global delivery center demonstrates how NTT DATA is transforming itself. Starting as a managed services desk for clients in Asia/Pacific in 2002, the operation now handles 80% of NTT DATA's SDIS business, which is now centralized and globally delivered. Additional services such as NTT DATA's internal IT Hub, Professional Services Global Capability Center, and Global Field Services, which support

customers in 165 countries, are now delivered from this location. Scale is only one element of how services have changed over the past two decades.

How NTT DATA delivers support services is another example of the portfolio's transformation. The Software-Defined Infrastructure Services value proposition is delivered across three stages, whereby each stage addresses different customer requirements for supporting their increasingly complex environments:

- **Service-level agreement:** SLA includes traditional "keep the lights on" support services to guarantee performance and reliability.

- **Utilization-level agreement (ULA):** ULA includes optimization of infrastructure and risk reduction. Services offered include Simplified License Management, providing best practices and real-time insights; Optimization and ROI Maximization Services that include advice on "True-Forward" costs with expert guidance on "value shift" to track Enterprise Agreement ROI to close consumption gaps; and Technology Design Review Services to ensure every deployment delivers maximum value with annual design reviews aligned to vendor best practices. The focus on risk reduction as part of the ULA is also a significant shift with an emphasis on reducing last day of support (LDOS), coupled with benchmarking data across 5,000+ NTT DATA clients.

- **Value-level agreement (VLA):** VLA focuses on achieving business outcomes. Unique offerings include Outcome Success Plan (OSP) framework to drive business value, Sustainability Insights for CO_2 Scope 2 and Scope 3 emissions, and energy consumption. NTT DATA has also taken this a step further by combining Sustainability Insights into Asset Lifecycle Planning to identify energy and CO_2 savings from technology refresh of LDOS devices.

In addition, Adoption Services are another important offering in the portfolio, as they play a vital role in accelerating business outcomes by assessing use case adoption by fast-tracking onboarding and implementation of high-impact solutions.

The upside of a visit to the NTT DATA Bangalore global delivery center was the opportunity to see this strategy being put into practice. Examples included a global aircraft and defense manufacturing firm that came to NTT DATA to enable its multivendor network (35,000 assets from 30 vendors across 23 countries), security sourcing, and services. A significant component of the engagement went beyond keeping the lights on by expanding the opportunity to modernize the campus network and IT infrastructure. The customer worked closely with the Infrastructure Services unit and committed to a multiyear premium support contract (based on the Software-Defined Infrastructure Services approach outlined previously) for 35,000 devices at 67 global locations. In addition, an NTT DATA Digital Wallet provided a consolidated view of licenses across all vendors, One Enterprise Agreement supported the growing license estate of the client, and an eprocurement agreement enabled rapid and efficient infrastructure transactions.

IDC'S POINT OF VIEW

IDC is encouraged that the Infrastructure Solutions unit is now one of the centerpieces of the overall NTT DATA strategy. It reflects the impact that AI is having on the market and the importance of building a modern infrastructure foundation, the vitality of key partners in areas like networking and security, and the innovation investments by services partners like NTT DATA Infrastructure Services organization outlined previously.

Driving and sustaining growth requires continuous investment in a range of services capabilities across the stack and an ecosystem of market-leading technology partners. We believe that NTT DATA is doing a good job in terms of both strategy and technical execution. However, realizing this vision will require the company to enhance its mindshare among IT buyers as a full-stack technology services partner in a competitive market. Despite its global reach and very healthy balance sheet, it can and should become more visible in key geographies and industry segments where it already is an established player. Continuing to build credibility and influence with C-suite and line-of-business leaders driving AI-driven business transformation initiatives will be critical for success, coupled with its continued engagement with traditional IT decision-makers that will work to give NTT DATA the market awareness it needs to effectively compete.

LEARN MORE

Related research

- *NTT DATA: Gearing for a 25x AI Economy Through Responsible, Full-Stack Transformation* (IDC #AP54107125, January 2026)
- *NTT DATA Reignites Go-To-Market Strategy for Large Accounts* (IDC #EUR153225525, March 2025)

Synopsis

This IDC Market Note looks at NTT DATA's strategy and execution in the wake of the recent (4Q25) analyst event. NTT DATA's Infrastructure Solutions unit is central to the company's AI-driven strategy, focusing on modernizing infrastructure to enable scalable, outcome-based services. By transforming traditional offerings into AI-powered solutions and emphasizing platform-led approaches, NTT DATA aims to drive operational efficiency, risk reduction, and sustainability. IDC views this strategic shift positively, but notes that greater visibility and influence among IT buyers and C-suite leaders will be essential for NTT DATA to fully realize its growth ambitions in a competitive market.

"Infrastructure is critical again," states Chris Barnard, VP, Networking. NTT DATA understands the importance of how modernized infrastructure and AI-powered services are redefining business outcomes and transforming the competitive landscape for global technology services."

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Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com