IDC MarketScape

IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment

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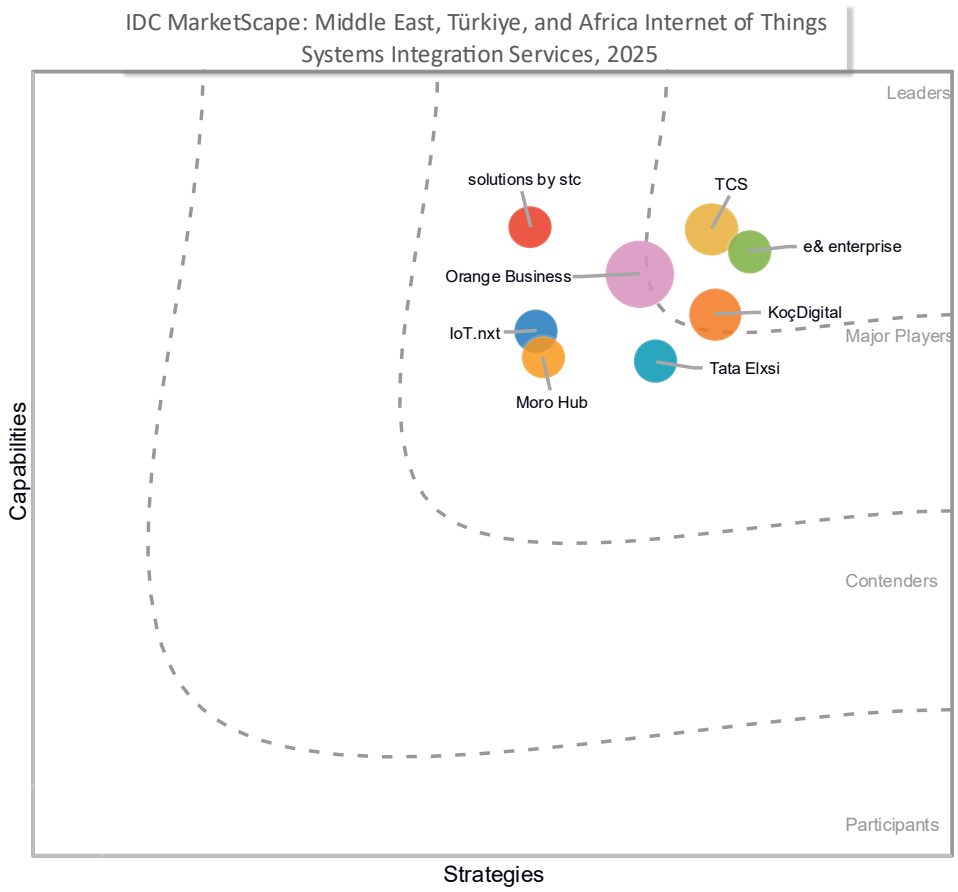
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Middle East, Türkiye and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment



Source: IDC, 2025

June 2025, IDC #META51810224

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

IDC OPINION

The Internet of Things (IoT) systems integration (SI) services market in the Middle East, Türkiye, and Africa (META) continues to evolve as organizations across industries accelerate their digital transformation initiatives. IDC's comprehensive evaluation reveals successful vendors are those that can seamlessly integrate hardware, software, and networking components into cohesive, intelligence-driven IoT ecosystems.

The META market has witnessed a fundamental transformation in systems integration requirements. While early IoT deployments focused primarily on connecting devices to networks, current enterprise demands encompass full-stack integration spanning edge devices, gateway systems, cloud platforms, analytics engines, and application layers. IDC's analysis indicates vendors offering comprehensive integration services are commanding premium pricing compared with connectivity-focused providers.

The convergence of hardware acceleration, software-defined networking, and edge computing architectures is fundamentally altering systems integration approaches in the META region. Edge computing implementations now require the integration of specialized processors with software containers and 5G network slicing. Integration complexity is particularly pronounced in industrial IoT (IIoT) deployments in which OT and IT convergence requires sophisticated systems integration expertise.

AI-enabled integration platforms are gaining significant traction as part of this technological convergence. Vendors incorporating AI capabilities into their systems integration services are achieving remarkable competitive advantages. AI-powered device management platforms are reducing deployment time by 40%–50%, while machine learning (ML) algorithms optimize network performance across heterogeneous connectivity options. Generative AI is automating integration code generation for proprietary protocols and legacy systems.

The META region's unique infrastructure landscape presents both challenges and opportunities for systems integration services. Gulf Cooperation Council (GCC) countries are leading in 5G adoption, driving demand for integration services that leverage high-bandwidth, low-latency connectivity. Türkiye's strategic location as a bridge between Europe and Asia creates opportunities for cross-regional IoT deployments requiring sophisticated integration capabilities. Africa's heterogeneous infrastructure demands flexible integration approaches that can accommodate varying technology maturity levels. Government initiatives such as Saudi Arabia's Vision 2030 and the UAE's Smart City programs are accelerating demand for end-to-end systems integration services.

Different industry verticals in the META region present unique systems integration challenges. Key sectors include oil & gas (which require integration of legacy supervisory control and data acquisition or SCADA systems with modern IoT platforms) and manufacturing (which demands OT-IT convergence, enabling real-time data integration between factory floor equipment and enterprise systems). Smart cities necessitate multisystems integration across transportation, utilities, and public services with varying technology standards.

Given the diverse regulatory landscape across META countries, security has become a fundamental component of systems integration services. Hardware root-of-trust implementations ensure device-level security, while end-to-end encryption protocols are integrated at platform level. Secure enclaves for data processing at the edge — combined with compliance frameworks spanning GDPR, local data protection laws, and industry-specific regulations — are now standard requirements for integration projects.

The systems integration services market in META faces a significant skills gap, creating opportunities for vendors that invest in local capability-building. Training programs for integrating complex hardware-software-network stacks and partnerships with local educational institutions are critical for developing regional expertise.

These market dynamics indicate successful systems integration vendors in the META region must possess deep technical expertise across hardware, software, and networking domains while understanding local market requirements, regulatory frameworks, and industry-specific challenges. The complexity of integration requirements continues to grow as organizations pursue more ambitious digital transformation initiatives, creating sustained demand for sophisticated systems integration services.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

For this research, IDC defines systems integration as a process that includes the planning, design, implementation, and project management of a technical solution that addresses an organization's specific technical or business needs. When SI deals involve contracting for hardware integration, network infrastructure deployment, or custom application development related to systems integration, those activities are included in the definition of SI. Systems integration projects typically involve different platforms and technologies. Vendors providing any of the following two services were included in scope of the study.

- Hardware deployment or integration, network infrastructure deployment or integration, sensor deployment integration services
- Software deployment (platform, middleware, data software, etc.) or integrations and/or customization services

This IDC MarketScape focuses exclusively on vendors with dedicated IoT systems integration capabilities, excluding those that only provide general systems integration services. A critical point in this research effort was to meet the following inclusion criteria:

- Each vendor was required to possess comprehensive in-country IoT systems integration services delivery capabilities in at least one of the regions or subregions (Sub-Saharan Africa, Türkiye, Saudi Arabia, the UAE, or OGCC [i.e., a subregion comprising Qatar, Oman, Kuwait, and Bahrain]).
- The vendor had to report a minimum of $1 million in annual revenues (not pass-through revenues generated by outsourcing/subcontracting partners) from IoT systems integration services for the countries in the META region.
- Each vendor needed to have at least one local office in one of the focus subregions or in multiple countries in the rest of the META region.
- The description of the IoT service portfolio of the vendors had to match IDC's taxonomy.

ADVICE FOR TECHNOLOGY BUYERS

Organizations in the META region seeking IoT systems integration partners should consider the following strategic guidance:

- **Industry-specific expertise.** This is crucial because the META region has distinct verticals (oil & gas, healthcare, manufacturing, smart cities) with specialized requirements. Generic IoT solutions won't address sector-specific challenges such as legacy SCADA integration in energy sectors or compliance requirements in healthcare. Industry-specific expertise accelerates ROI and reduces implementation risks.
- **AI and analytics capabilities.** Given that AI-powered platforms are achieving 40%–50% deployment time reduction, this capability directly impacts project success and cost efficiency. In the META region where organizations are accelerating digital transformation, AI integration separates modern solutions from outdated approaches. This technology enables competitive differentiation and measurable business outcomes.
- **Security and compliance frameworks.** The diverse regulatory landscape across META countries (GDPR considerations, local data laws, industry-specific regulations) makes security expertise non-negotiable. With different compliance requirements in the UAE, Saudi Arabia, Egypt, and other countries, vendors must navigate complex regulatory environments while ensuring data sovereignty.
- **Ecosystem strength over individual capabilities.** No single vendor can deliver the complete hardware-software-networking stack needed for sophisticated IoT integration. In META's heterogeneous infrastructure

environment, ecosystem strength determines the ability to bridge technology gaps and deliver comprehensive solutions across varying maturity levels.

- **Change management and adoption.** The significant skills gap in the META region makes change management critical for project success. Vendors that invest in local capability building not only ensure successful implementation but also create sustainable competitive advantages by developing regional expertise.
- **Regional and local expertise.** The META region's cultural diversity, linguistic differences, and varying infrastructure maturity levels require deep local understanding. Vendors with regional presence and government relationships are better positioned to navigate initiatives such as Vision 2030, understand local market dynamics, and deliver culturally appropriate solutions.

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 opportunities.

e& enterprise

e& enterprise is positioned in the Leaders category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

e& enterprise (formerly known as Etisalat Group) is a multinational technology and telecommunications company headquartered in the UAE. Operating across the Middle East, Africa, and Asia, e& enterprise has expanded its portfolio to include digital solutions such as cloud computing, cybersecurity, artificial intelligence, 5G, and IoT. The company focuses on digital transformation to enhance business operations, urban infrastructure, and digital economies.

Through diverse connectivity solutions including 5G, LTE, fixed connectivity, and satellite networks, e& enterprise enables real-time IoT applications across multiple sectors. The company serves key industries such as utilities, oil & gas, transportation, government, financial services, and smart cities, with tailored solutions addressing sector-specific requirements. e& collaborates with global technology providers including Microsoft, AWS, PTC ThingWorx, and Cumulocity — as well as hardware providers such as JCI, Honeywell, and Huawei — to deliver comprehensive integrated solutions. Additionally, e& enterprise benefits from its close integration with Help AG, its in-house cybersecurity arm and a recognized market leader. These strategic partnerships enhance its market presence and provide access to advanced technologies.

e& enterprise has implemented extensive smart utility automation projects, connecting numerous water and electricity meters for clients such as TAQA and Etihad Water and Electricity. The company operates R&D and innovation centers, including the e& enterprise IoT Lab in the UAE and the Open Innovation Centre in Dubai, which contribute to advancements in IoT and systems integration capabilities.

With a substantial presence in the Middle East and a team of IoT experts across the GCC region, e& enterprise delivers scalable solutions. Its expertise in technology adoption supports its role in digital transformation across various industries.

Strengths

e& enterprise IoT provides end-to-end integration services, supporting enterprises and government organizations in implementing data-driven and automated operations. The company specializes in systems integration, including infrastructure development, application integration, and AI-driven automation. Its IoT Edge Compute capabilities process data closer to its source, reducing latency for time-sensitive applications. AI and machine learning enhance predictive analytics, anomaly detection, and intelligent automation, improving operational efficiency.

With a focus on in-country deployment, e& enterprise offers smart utility automation solutions such as UtilitySync and UtilityPlanner for large-scale metering projects. The company's R&D and innovation centers support prototyping, system testing, and solution development.

e& enterprise enhances client engagement through innovation demonstrations, training programs, and structured review sessions. The company invests in workforce development to align with emerging technologies and market needs. Strategic recruitment and career development programs support its growth, and the acquisition of Smartworld has expanded its IoT services, particularly in the aviation sector.

Emphasizing sustainability, security, and compliance, e& enterprise integrates generative AI, machine learning, and automation to enable real-time insights, predictive maintenance, and operational efficiency while supporting environmental, social, and governance (ESG) objectives. The company also prioritizes data security and regulatory compliance, with plans to enhance in-house advisory capabilities for customized client solutions.

Challenges

In the rapidly evolving IoT landscape, continuing investment in research and development represents an opportunity for e& enterprise to further strengthen its position in systems integration and IoT services. As the company expands its offerings, maintaining alignment with global security standards and best practices will remain important areas of focus. e& enterprise is particularly well-positioned to

address emerging cybersecurity considerations through its close integration with Help AG, its in-house cybersecurity arm and a recognized market leader.

e& enterprise's current approach to operations provides advantages for data security and regulatory compliance, while future strategies may explore balancing these strengths with enhanced operational flexibility to support expanded geographic coverage and diverse talent acquisition.

IoT.nxt

IoT.nxt is positioned in the Major Players category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

Established in 2015, IoT.nxt is a Pretoria-based global IoT provider offering services across Europe, Africa, North America, and other regions. The company was acquired by Vodacom Group in 2019, which provided strategic leverage including access to Vodacom and Vodafone's distribution channels. The company maintains offices in South Africa (Pretoria, which also serves as its main development center), the U.K. (London), and the Netherlands (The Hague).

IoT.nxt offers an array of IoT solutions, including vertical products built on its platform technology, hardware, managed services, and professional services. The company offers two Raptor gateway products: Edge Raptor (an IoT gateway typically deployed onsite with client equipment) and Virtual Raptor (an IoT gateway that runs in the cloud, either IoT.nxt's or the client's private cloud) and remotely connects to onsite devices via IP-based protocols. The company's Commander platform orchestrates real-time data from various IoT devices, while its Navigator platform focuses on data analytics and integrates with the Commander platform to streamline AI and IoT application development and operations. Its business model combines licensing revenue, hardware solutions, and professional services, providing a balanced portfolio approach.

Strengths

IoT.nxt has built significant in-house technology development and complex solution integration capabilities in a relatively short time span. The company has established a strong reputation for technical excellence in the IoT domain, with core focus on telecommunications, utilities, mining and smart spaces, while also maintaining successful projects across education, government, insurance, retail, real estate, agriculture, manufacturing, and transportation. Its verticalized approach has resulted in industry-specific solutions that address targeted operational challenges.

A key differentiator for IoT.nxt is its proprietary Raptor gateways (i.e., Edge Raptor and Virtual Raptor), which facilitate bidirectional communication and the integration of sensors, devices, and systems. The platform's technology-agnostic approach enables organizations to integrate IoT capabilities without replacing existing

equipment, thereby delivering faster ROI. The company's acquisition by Vodacom has accelerated its global market access, with both Vodacom and Vodafone adding IoT.nxt's offerings into their enterprise solutions.

IoT.nxt has successfully implemented numerous projects with major enterprise and service provider customers. Recent notable deliveries include Eskom, Shoprite, Vantage, Vodacom, Vodafone Italy, Vodafone UK, Vodafone Germany, and Pakistan Telecommunication, validating its solutions and capabilities in real-world environments across multiple markets.

Challenges

As the company expands into new markets, there are opportunities to elevate its branding strategy to increase visibility in established regions and areas of new growth. Highlighting vertical-specific expertise and successful implementations could further differentiate IoT.nxt in an increasingly competitive marketplace.

KoçDigital

KoçDigital is positioned in the Leaders category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

Founded in 2018, KoçDigital has established itself as a focused provider of industrial IoT, supply chain, and AI services, particularly in the manufacturing sector. The company is part of Koç Holding, which gives it strong foundations in the Turkish market while supporting its expansion into other META countries. With a substantial team of dedicated IoT professionals, KoçDigital has demonstrated impressive growth in its IoT integration business over recent years, establishing itself as a notable player in the region.

KoçDigital's approach centers around its proprietary Platform360 family of solutions, which offers connectivity, execution, and AI capabilities specifically tailored for industrial environments. Its portfolio includes a range of modules covering areas such as IIoT platform services, remote asset management, manufacturing execution, predictive maintenance, and energy monitoring. The company has developed specialized AI capabilities, including its Platform360 Co-Pilot that combines generative AI with manufacturing operations data to provide actionable insights and decision support.

The vendor has developed a strong presence in sectors including automotive, home appliances, oil & gas, metal production, and defense, with notable clients such as Beko, Ford Otosan, and Tüpraş. KoçDigital has an established regional presence with offices in Türkiye, Saudi Arabia, the UAE, and representation in other regional countries. Recent partnerships, such as with Saudi Business Machines (SBM), indicate a strategic push to expand further across the META region.

Strengths

KoçDigital demonstrates strength in its domain expertise, with a consultative approach that begins with industrial readiness assessments and road map development. The vendor possesses solid manufacturing industry knowledge, which helps in addressing complex shop-floor integration challenges. Its proprietary Platform360 family provides a foundation for industrial IoT deployments with composable, reusable components that can reduce deployment times and enhance value realization.

The company has invested significantly in AI capabilities, developing solutions that leverage operational data to deliver enhanced value. Its Platform360 Co-Pilot, which enables natural language interaction with manufacturing data, represents an innovative approach to making industrial data more accessible to decision-makers. KoçDigital's focus on well-defined ROI calculations and business cases also strengthens its position with industrial customers that require clear value demonstration.

Challenges

While KoçDigital has established a strong position in Türkiye and is expanding across the META region, the company will need to further develop its presence and partnerships to compete effectively in the market.

The company will need to continue expanding its go-to-market partnerships and channels as it grows beyond its core market. Although KoçDigital has established offices in key regional locations, building the necessary ecosystem of partners and integrators will be crucial for scaling operations effectively.

Moro Hub

Moro Hub is positioned in the Major Players category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

Moro Hub drives digital transformation, helping businesses and governments leverage smart technologies. Based in the UAE, the company provides smart city solutions and IoT integration, reshaping urban landscapes with innovative technologies. By incorporating AI, 5G, and edge computing, Moro Hub enhances operational efficiency, optimizes resource use, and supports sustainability.

Its offerings span utilities, government, and healthcare, with a strong presence in these sectors. Moro Hub's IoT platforms — WMW Hub, Esri, Cumulocity, Johnson Controls, and the Smart Cities & IoT Hub — enable organizations to access real-time analytics, seamless connectivity, and data-driven insights. The company also offers integrated physical security platforms (IPSP) for government digital transformation and location solutions for advanced GPS tracking. Moro Hub provides

comprehensive GIS services that manage complex technology stacks and develop specialized applications for urban planning, infrastructure management, and spatial intelligence initiatives.

With expertise in AI/ML, generative AI, private 5G networks, and Microsoft DevOps, Moro Hub delivers scalable and secure IoT solutions. It has partnered with communication providers to ensure reliable connectivity and seamless integration. Its pricing models — capex, opex, and pay-as-you-go — offer businesses flexible and cost-effective options to drive innovation and improve decision-making in the digital era.

Strengths

Moro Hub specializes in seamless IoT systems integration, ensuring interoperability across diverse platforms and devices. Its expertise in AI, machine learning, edge computing, and digital twin technology enables real-time data processing, predictive insights, and enhanced automation. By incorporating 5G and private networks, Moro Hub improves connectivity and system responsiveness for smart city applications.

The company actively engages in proofs of concept (POCs), workshops, and industry events to showcase its capabilities and drive IoT adoption. Its 24 x 7 IoT command and control center, combined with cloud and cybersecurity services, provides a secure foundation for deployments. Moro Hub also leverages generative AI for anomaly detection and customized user experiences.

Through strategic vendor partnerships and collaboration with local ecosystem players, Moro Hub delivers scalable and future-ready IoT solutions. Its focus on automation, AI-driven optimization, and standardized protocols ensures cost-effective and adaptable integration. By continuously refining its approach through agile development and industry engagement, Moro Hub supports businesses in accelerating digital transformation.

Challenges

Moro Hub faces industrywide talent acquisition challenges in specialized domains such as AI, cybersecurity, and edge computing. The company's innovation capabilities currently center around its UAE operations, which may present scaling considerations for large international deployments.

Moro Hub's growth opportunities include expanding market presence across additional sectors such as supply chain logistics and education. Further development of capabilities in emerging technologies such as AR/VR and autonomous systems could strengthen its portfolio as the regional IoT market matures.

Orange Business

Orange Business is positioned in the Major Players category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

Orange Business is the enterprise division of the global Orange Group telecommunications company, operating with a separate P&L structure. While Orange Group has a significant global presence spanning more than 168 countries, Orange Business has focused on developing its capabilities across the Middle East and Africa region, with offices in strategic locations such as the UAE, Saudi Arabia, Qatar, Türkiye, South Africa, Morocco, Egypt, and Nigeria. The company has an extensive R&D network comprising 12 innovation centers worldwide, and it has made significant investments in IoT, AI, and connectivity technologies.

The company's portfolio and services are structured around four strategic value propositions — digital infrastructure, operational experience (OX), customer experience (CX), and employee experience (EX) — and it is overarched by its cybersecurity offering. Within these, Orange Business offers comprehensive services covering consulting, design, build, and operate phases for complex integration projects. The company has particularly distinguished itself in large-scale implementations, integrating thousands of IoT devices and OT subsystems across smart cities, smart stadiums, smart airports, datacenters, and industrial facilities.

Strengths

Orange Business brings a unique network-native approach to IoT integration, leveraging its telecommunications heritage while expanding into end-to-end systems integration. The company's founding membership in LoRa Alliance and experience with connectivity technologies provides a solid foundation for successful IoT deployments. This connectivity expertise is complemented by strong capabilities in IT/OT integration, enabling the company to bridge traditional gaps between operational technologies, data discipline, and modern IT systems.

A key differentiator for Orange Business is its experience with massive-scale IoT integrations, exemplified by projects such as Msheireb Doha Downtown where over 645,000 IoT endpoints were integrated into a single platform. This capacity for managing complex, large-scale deployments positions the company well for significant government and private sector initiatives across the region.

The company's new flexible commercial models for smart city as a service (SCaaS), including pay-as-you-go options alongside traditional capex and opex approaches, also enhance its appeal to potential clients in the region.

Orange Business demonstrates mature delivery capabilities through its structured approach to governance, architecture, and project management.

Challenges

While Orange Business possesses strong technical capabilities in integration services, the company faces challenges in market perception. Despite its significant presence in the systems integration space, potential customers still primarily associate Orange with telecommunications services rather than comprehensive IoT integration.

Looking ahead, Orange Business has indicated plans for strategic acquisitions to strengthen its position in the MEA region. Successfully integrating these acquisitions while maintaining service quality will be crucial for the company's growth ambitions, particularly as it expands its footprint across both established markets such as the UAE and Saudi Arabia and other emerging markets in the Middle East, Türkiye, and Africa.

solutions by stc

solutions by stc is positioned in the Major Players category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

The company functions as the systems integrator and digital services arm of Saudi Telecom Company (STC) and IoT Square, leveraging extensive partnerships with over 150 organizations including OEMs, systems integrators, and cybersecurity providers locally and globally. Established as a systems integrator, solutions by stc has evolved into comprehensive digital solutions provider with strength in IoT integration across diverse sectors including oil & gas, telecom, banking, government, education, healthcare, and real estate. The company maintains a dominant market presence in Saudi Arabia, focusing on improving productivity and performance through IoT implementations.

Within its IoT portfolio, solutions by stc offers a diverse range of offerings including fleet management, video surveillance service, mobile point of sales, virtual clinics, enterprise medical imaging, medical voice recognition, digital signage, asset management, and staff identification. The company's service capabilities span the entire IoT value chain — from strategy and consulting to design, deployment, integration, and management. Its R&D teams actively develop software for analytics and platform enhancements for data visualization, while also providing prototyping, implementation, and integration services with AI/ML, Big Data, and security components for comprehensive IoT solutions.

Strengths

solutions by stc benefit from its position as a subsidiary of the incumbent telecommunications operator, providing access to an extensive customer base, well-established client relationships, and significant infrastructure developed over time. The company was among the pioneering telecommunications service providers in

Saudi Arabia to offer an end-to-end fleet management solution, building a reputation for delivering machine-to-machine connectivity with high reliability. Its approach combines domain-focused expertise with a customer success framework that emphasizes business outcomes rather than purely technical deliverables.

A key differentiator for solutions by stc is its ability to co-develop unique solutions customized to client business demands and budgetary constraints, with options for subscription-based models that offer payment flexibility and scalability. The vendor maintains strong technological partnerships with leading providers including AppsWave, Davra, Cisco, Genesys, Avaya, Bosh, Huawei, Hikvision, and Microsoft. Its in-house experts demonstrate proficiency in comprehending client requirements and developing bespoke solutions utilizing the up-to-date tools and approaches, enabling clients to make informed business decisions.

Challenges

solutions by stc appears to maintain a primary focus on enterprise and public sector clients, with opportunities to develop additional offerings tailored for small businesses. While the company has established presence across multiple verticals including oil & gas and healthcare, there may be opportunities to further deepen market penetration in some of these industries.

As digital transformation initiatives expand across the region, solutions by stc could benefit from increasing its capacity in emerging technologies such as AR/VR implementation for IoT applications. The company has established a solid foundation for innovation through its R&D teams working on analytics and platform enhancements. Continued investment in these capabilities, along with strategic partnerships, could further strengthen solutions by stc's market position as IoT adoption accelerates across diverse industry segments throughout the region.

Tata Elxsi

Tata Elxsi is positioned in the Major Players category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

Founded in 1989 and headquartered in Bangalore, India, Tata Elxsi has evolved into a design-led technology service provider with operations in 33 cities globally. The company organizes its business around three primary verticals: transportation (50%), media & communications (36%), and healthcare & life sciences (14%). With over 12,000 professionals, Tata Elxsi has maintained consistent growth in recent years, demonstrating its ability to execute and deliver end-to-end projects across various industry segments.

Tata Elxsi's IoT systems integration approach is distinguished by its design-led methodology, combining industrial design capabilities with digital engineering expertise. Its portfolio encompasses diverse connected solutions spanning

automotive telematics, smart manufacturing, connected healthcare, and smart city applications. The company offers a range of proprietary platforms including Tether (a hyperscaler-neutral IoT platform), Tether Auto (for connected vehicle solutions), and LEXI (a digital twin framework), augmented by complementary offerings in AI/ML, AR/VR, and cloud services.

In the transportation sector, Tata Elxsi provides comprehensive connected vehicle solutions from in-vehicle telematics and V2X connectivity to cloud-based analytics and digital twin implementations. The company's healthcare division delivers IoT-enabled connected care solutions focusing on remote patient monitoring, clinical workflow automation, and device connectivity. For industrial applications, Tata Elxsi offers manufacturing execution systems integration, edge computing solutions, and AI-based quality control and predictive maintenance services.

Strengths

Tata Elxsi brings distinctive advantages through its design-led approach to IoT systems integration, enabling holistic solutions that address both technical functionality and user experience considerations. The company's vertical-focused business structure allows for deep domain expertise and specialized solutions for sectors such as automotive, healthcare, and industrial manufacturing.

The firm has developed a robust ecosystem of proprietary platforms and accelerators that can be deployed across diverse IoT implementations, potentially reducing time-to-market and integration complexity. Tata Elxsi's capabilities span the entire IoT value chain from device connectivity and edge processing to cloud platforms and analytics, allowing for comprehensive enterprise solution development. Tata Elxsi's center of excellence for AI/ML and generative AI capabilities demonstrate commitment to incorporating emerging technologies into its IoT offerings. The company's expertise in 5G-enabled IoT solutions positions it to collaborate with telecommunications providers in META as they seek to monetize cross-industry enterprise offerings through connected platforms.

Challenges

Competition in the META IoT systems integration market is intensifying as vendors expand their service offerings and technical expertise. To maintain differentiation, Tata Elxsi will need to continue investing in its vertical-specific expertise while adapting offerings to the unique requirements of META markets. Additionally, the company could benefit from more clearly articulating its success stories and reference implementations within the region to build greater market recognition.

TCS

Tata Consultancy Services (TCS) is positioned in the Leaders category in the IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment.

TCS is a global IT services, consulting, and business solutions company, delivering IoT systems integration to drive digital transformation across various industries, including energy and utilities, telecom, manufacturing, public sector, and smart cities. With expertise in AI, ML, industrial IoT, Industry 4.0, and digital twin technologies, TCS provides solutions that optimize operational efficiency, enhance automation, and support data-driven decision-making.

TCS offers a range of solutions such as IP2, DigiFleet, Digital Manufacturing Platform (DMP), InTwin (digital twin), TCS Clever Energy, and Cognitive AI solutions, designed to improve real-time monitoring, predictive maintenance, and operational performance. Collaborating with global partners such as Microsoft, Amazon, Google, Nvidia, and Intel, TCS delivers secure, scalable IoT-based platforms to support businesses in their digital transformation efforts.

The company is committed to sustainability, fostering a green environment through IoT solutions while building a solid foundation for AI. TCS continues to invest in research and development, leveraging generative AI to enhance efficiency and advance its IoT integration services, helping businesses in their transformation journeys.

Strengths

TCS's IoT-based systems integration capabilities focus on AI-driven analytics, predictive maintenance, and process optimization, enabling industries to enhance efficiency and reliability. TCS' ability to leverage the right technology across AI, GenAI, industrial AI, digital twin, Industry 4.0, and other technologies for solving the business problem at scale is seen as its greatest strength.

With expertise in smart infrastructure, industrial automation, and connected operations, TCS delivers scalable IoT solutions such as the Smart Street Lighting project, integrating AI-powered analytics for automation and energy optimization. TCS addresses complex client challenges, such as supply chain optimization, by implementing GenAI solutions. It modernizes legacy systems with digital and AI-first strategies, leveraging IoT sensors, AI analytics, and digital twins to enhance asset maintenance and minimize downtime. Its advanced robotics and AI-driven video analytics enhance quality inspection, worker safety, and operational efficiency in manufacturing and logistics.

To support diverse business needs, TCS offers flexible pricing models, including outcome-based, risk-reward, and license-based structures, enabling organizations to scale IoT adoption in a cost-effective manner. Complementing its technical expertise, TCS employs targeted marketing strategies such as thought leadership initiatives, digital campaigns, and social media outreach to highlight its capabilities. Its service delivery approach focuses on developing customized solutions and tailored road maps for Industry 4.0 implementation. By collaborating with technology providers,

cloud partners, and hardware manufacturers, TCS ensures end-to-end IoT solutions that drive efficiency, automation, and improved decision-making for businesses.

Challenges

TCS faces market challenges in balancing value realization with cost optimization demands from enterprises. While many organizations prioritize immediate cost reduction, TCS recognizes the opportunity to focus on long-term digital transformation value. The company is addressing this by enhancing its marketing efforts for small and medium-sized enterprises that may adopt digital-led customer experience road maps more readily.

The rapid evolution of digital platforms, AI, cloud computing, and IoT technologies require continuous innovation and investment. TCS is responding by scaling emerging technologies such as generative AI and industrial IoT while ensuring alignment with evolving industry requirements. The company continues to strengthen its go-to-market strategies through partnerships, industry-specific frameworks, and innovation labs to stay ahead of technological shifts.

VENDORS TO WATCH

While the evaluated vendors represent a significant share of the IoT systems integration services market in the META region, several other notable providers did not meet all the criteria for inclusion but warrant consideration for specific use cases.

HCLTech

HCLTech's Digital Foundation Services include IoT integration capabilities with emphasis on automation and AI-driven service delivery. Its proprietary industry framework addresses IoT needs across multiple verticals, with particular strength in manufacturing and utilities. The company's focus on sustainability and ESG compliance aligns well with regional government initiatives.

IDC recognizes that many of these providers deliver valuable IoT systems integration services to specific market segments or geographies within the META region. Organizations should consider these providers alongside the vendors evaluated in this study when their specific capabilities align with business requirements or regional needs.

Tech Mahindra

Tech Mahindra offers comprehensive IoT systems integration services with strong capabilities in manufacturing and telecommunications verticals. Its industry platform and focus on Industry 4.0 solutions make it particularly relevant for organizations seeking integrated cloud and IoT services. The company has established

partnerships with major technology providers and demonstrates solid expertise in hybrid cloud environments.

Wipro

Wipro's cloud-native approach encompasses IoT integration services with strong focus on digital transformation. Its industry platform and investment in AI-powered integration tools position it well for complex enterprise IoT deployments. The company demonstrates strength in automotive and healthcare verticals with proven management capabilities.

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 with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts look at how well a vendor builds/delivers 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 would like to thank all the organizations that participated in this study for their time, insights, and commitment to the evaluation process. The IDC team reached out to over 100 vendors operating in the META IoT systems integration services market, evaluating their capabilities and strategies through detailed questionnaires, briefings, and client references.

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

Market Definition

IDC's IoT systems integration (SI) services encompass planning, design, implementation, and project management processes that address specific technical or business needs through connected technologies. These services include hardware deployment, network infrastructure integration, sensor implementation, and software deployment across platforms such IoT middleware and data analytics tools. SI projects typically bridge various platforms and technologies, focusing on creating seamless connections between operational technology (OT) and information technology (IT) systems.

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 weighed evenly; the criteria weighing columns provide insight as to which criteria are weighed more heavily.

TABLE 1

Key Strategy Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
Functionality/offering road map	▪ Evaluation of how well the vendor identifies and addresses key customer business priorities ▪ Assessment of effectiveness in developing new skills and capabilities to meet emerging needs ▪ Extent of generative AI incorporation into services, including use cases and vision ▪ Evaluation of service differentiation strategy and unique value propositions	37.0%
Delivery model	▪ Comprehensiveness of approach to developing tools, frameworks, and methodologies ▪ Assessment of delivery infrastructure optimization to improve efficiency and reduce labor dependency ▪ Completeness and sophistication of platform features and implementation details	16.0%

TABLE 1

Key Strategy Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
	▪ Evaluation of strategy to make delivery processes stand out from competitors	
Customer service & support delivery & strategies	▪ Effectiveness of methodology for helping clients identify IoT opportunities ▪ Range and sophistication of business case development tools ▪ Diversity and effectiveness of client engagement activities ▪ Comprehensiveness of client adoption strategy ▪ Approach to guiding clients in adopting advanced digital technologies	12.5%
Growth strategy	▪ Clarity in identifying and targeting high-growth areas within IoT Integration Services ▪ Balance between organic development versus acquisitions and partnerships ▪ Effectiveness of integrating acquired companies to enhance capabilities and market access	9.5%
R&D pace/ productivity	▪ Comprehensiveness of approach to improving R&D processes and IP creation ▪ Extent of dedicated R&D facilities and planned investments ▪ Alignment of IoT R&D initiatives with innovation strategy ▪ Effectiveness of co-development partnerships and solution specifics	7.0%
Sales/distribution strategy	▪ Approach to improving internal sales and distribution capabilities ▪ Effectiveness in adapting sales strategies based on client IoT maturity levels ▪ Extent of leveraging external partners in sales processes ▪ Strategy for expanding partnerships to drive sales growth	5.5%
Other go-to-market strategy — partnerships & customer retention/ management	▪ Effectiveness in utilizing existing technology and cloud partnerships ▪ Approach to expanding and deepening technology partnerships	2.5%
Improving services portfolio	▪ Approach to enhancing existing IoT Integration life-cycle services ▪ Effectiveness in identifying and addressing weaknesses in service offerings	3.0%
Marketing strategy	▪ Clarity, targeting, and strategic positioning of marketing messages ▪ Vision for adapting marketing messages to market changes	2.0%
Financial/funding model	▪ Strategic allocation of investment across different service areas	2.0%

TABLE 1

Key Strategy Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
	▪ Approach to improving revenue per engineer and value enhancement strategies	
Employee strategy	▪ Comprehensiveness of plans for investing in technical and business skills ▪ Approach to attracting, developing, and retaining talent ▪ Effectiveness in addressing hiring and retention challenges	3.0%
Total		100.0%

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
Functionality or offering	▪ Assessment of breadth, depth, and maturity of IoT integration service offerings, including proprietary platforms ▪ Evaluation of market position, contract values, revenue, and geographic distribution ▪ Assessment of vertical market specialization and industry-specific expertise ▪ Evaluation of connectivity and networking service capabilities and partnerships ▪ Assessment of capabilities in integrating next-generation digital technologies	41.0%
Delivery model appropriateness and execution	▪ Evaluation of balance between project-based and long-term service engagements ▪ Assessment of delivery model distribution across onsite, nearshore, and offshore resources ▪ Evaluation of automation maturity in service delivery ▪ Assessment of breadth, depth, and strategic value of partnership ecosystem	15.0%
Cost management strategies & capabilities	▪ Evaluation of quality, detail, and demonstrated business impact of client case studies ▪ Assessment of frameworks and tools for developing client business cases	4.0%

TABLE 2

Key Capability Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
Portfolio benefits delivered	▪ Evaluation of quality, detail, and demonstrated business impact of client case studies	7.0%
Pricing model options and alignment	▪ Assessment of range and flexibility of pricing models offered to clients ▪ Evaluation of ability to align pricing options with customer needs ▪ Assessment of approaches to client cost optimization	6.0%
Sales/distribution structure, capabilities	▪ Evaluation of size and geographic distribution of dedicated IoT sales force ▪ Assessment of average years of experience within the IoT sales team	6.0%
Marketing	▪ Evaluation of range and types of marketing channels used ▪ Assessment of effectiveness and impact of marketing channel execution ▪ Evaluation of percentage of marketing budget allocated to IoT services	8.0%
Customer service delivery	▪ Assessment of percentage of repeat clients for IoT integration services ▪ Evaluation of year-over-year revenue growth ▪ Assessment of revenue distribution across key industry verticals	5.0%
R&D productivity	▪ Evaluation of innovation labs and R&D centers dedicated to IoT services ▪ Assessment of geographic distribution and impact of innovation capabilities	2,0%
Employee management	▪ Evaluation of regional distribution of dedicated IoT resources ▪ Assessment of balance between onshore, nearshore, and offshore resources ▪ Evaluation of ability to manage staff turnover and maintain resource quality ▪ Assessment of breadth and depth of relevant certifications held by employees	6.0%
Total		100.0%

Source: IDC, 2025

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Industrial Internet of Things Platforms and Applications in Manufacturing 2025 Vendor Assessment* (IDC #US52037124, April 2025)
- *IDC's Worldwide Internet of Things Spending Guide Taxonomy, 2024* (IDC #US52740423, December 2024)
- *META's IoT Revolution, Paving the Way for a Connected Future* (IDC #META52540524, August 2024)
- *Middle East, Türkiye, and Africa Industrial Internet of Things Market Trends?* (IDC #META50180423, May 2024)
- *IDC Survey Spotlight: What Are the Top Internet of Things Use Cases in Türkiye?* (IDC #META51758024, February 2024)
- *What Are the Key IoT Trends Shaping the Landscape in the United Arab Emirates?* (IDC #META50997124, February 2024)

Synopsis

This IDC MarketScape provides a vendor assessment of the 2025 IoT systems integration services market in the Middle East, Türkiye, and Africa (META). This assessment discusses quantitative and qualitative characteristics that explain success in this evolving market. It covers vendors ranging from global systems integrators to regional specialists, evaluating their capabilities across hardware, software, and networking integration. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another, highlighting factors expected to become the most important for success in both the short and long terms.

"Organizations across META must prioritize vendors with industry-specific expertise and AI-enabled integration capabilities to successfully navigate the complex IoT integration landscape. Security frameworks, ecosystem strength, and local expertise have become critical differentiators in this rapidly evolving market," said Hyder Aftab, research manager, Telecommunications and IoT, IDC META. "Vendors that can demonstrate measurable business outcomes while addressing the region's significant skills gap will capture the largest share of this rapidly growing market."

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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