

Consulting & Systems Integration Market Forecast

SPOTLIGHT REPORT

May 2026

Report Overview

As traditional services projects change amid heightened AI adoption, vendors must adapt their business models, portfolio offerings, and talent composition. Traditional IT services vendors are building out complementary consulting services, and more established consulting players, such as the Big Four and MBB (McKinsey, BCG and Bain & Co.), will be forced to evaluate how to evolve their businesses. TBR's *Consulting & Systems Integration Market Forecast* provides a comparison across tracked vendors, establishes best practices and identifies what will separate leaders from laggards over the next five years.

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"2025 served as a transitional period for vendors, during which they executed on strategic internal regionalization and portfolio development. The results of these bets will begin to pay off in late 2026 and 2027."

— Senior Analyst Kelly Lesiczka

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Executive Summary Excerpt

AI adoption and outcomes-based commercial models will reshape the traditional C&SI space and push IT services companies and consultancies to identify new areas of value and differentiation

Consulting & Systems Integration (C&SI)



2025: \$556B, +4.9% YTY



2030: \$739B, +4.4% YTY

Key Forecast Takeaways



Clients will increasingly require fixed-price and outcomes-based billing models. By 2030, 85% of engagements will feature new commercial models, and the remainder will be split between time & materials and software sales.



The cannibalization of the traditional consulting model due to AI will lower contract values, requiring vendors to find new methods of growth such as in managed services, security and operations.



Specialization strategies related to talent, business models and portfolios will define laggards and leaders. The need for blended technology and traditional consulting skills will accelerate.



Although it is not an immediate threat, the emergence of niche consultants could pressure vendors and their ability to charge high prices.

Scenarios

1. Essential evolution of the traditional consulting space

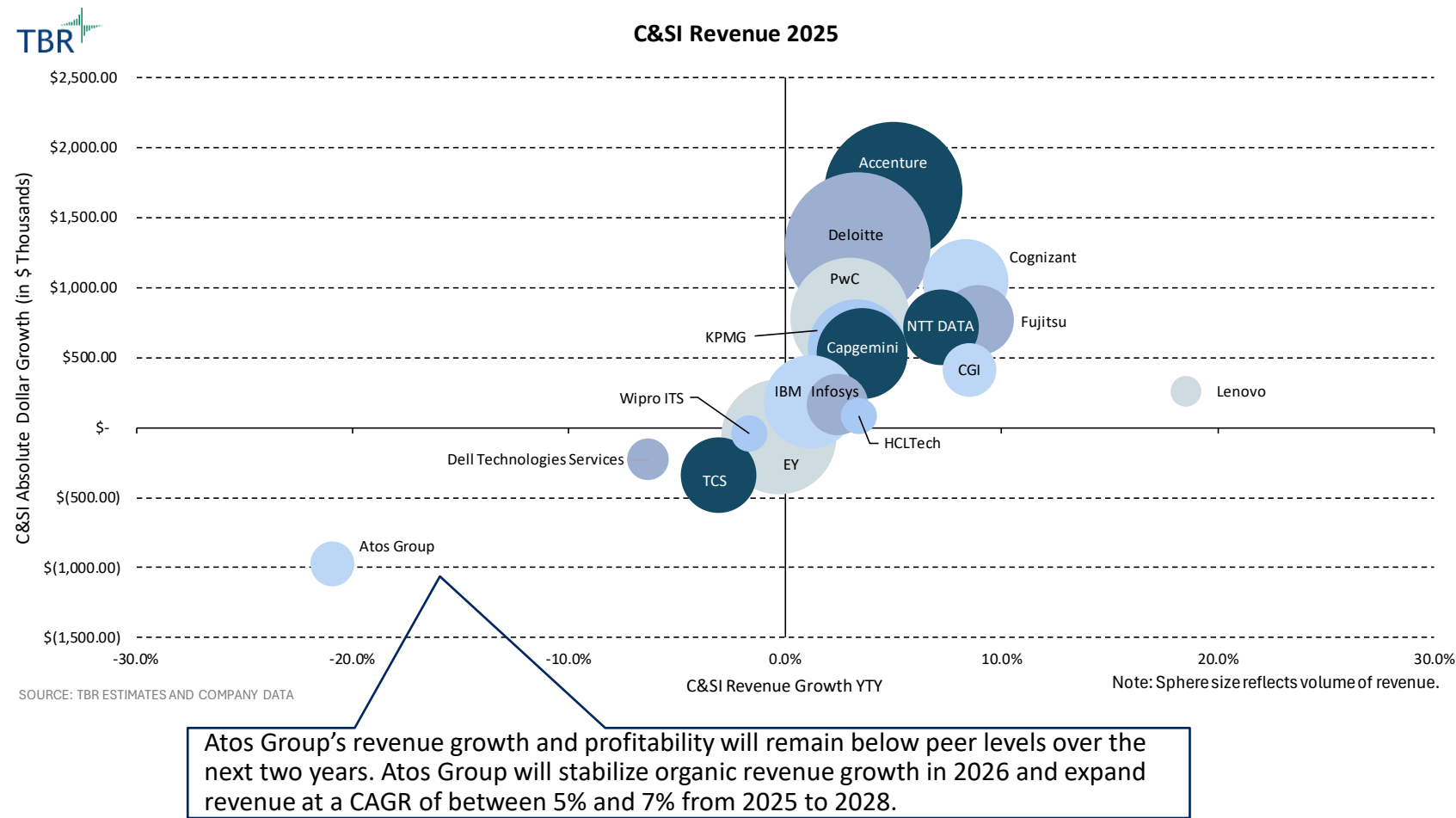
Vendors reframe consulting constructs to adjust for and navigate market disruption. People and permission will remain the primary levers but will require greater effort.

2. Specialization will guide portfolio and talent strategies

As clients look for ROI justification and a focus on outcomes, vendors will increase their specialized industry and technology skills and platforms that highlight their unique value. Expansion of partner-specialized services through acquisitions and internal training, tied back to consulting, will be a significant piece of vendors' investment strategies through 2030.

2025 served as a transitional period for vendors; in late 2026 and 2027, the greatest strategic bets will begin to pay off

C&SI Market Leaders



Assessment

Revenue performance in 2025 remained subdued as vendors struggled with how to effectively align their business models with the changing requirements of consulting engagements, including a recent push, largely from clients, toward outcomes-based and fixed-price contracts.

Changes around talent management to emphasize efficiency and margin performance, combined with the shifting nature of projects, influenced restructuring across vendors.

These changes also impacted revenue performance. In addition, vendors focused more on specialized consulting services and blending technology and traditional business and strategy skills.

Acquisitions helped to add industry expertise and partner-focused consulting services including for SAP and Salesforce.

Overall, 2025 was a transitional year for vendors to reposition their portfolios and talent groups toward emerging areas.

Vendor Market Share and Projections Excerpt

Although they are not large market share holders, Dell Technologies Services and HCLTech will leverage their portfolio advantages to capture new C&SI projects

DELL TECHNOLOGIES SERVICES & HCLTECH

REVENUE (IN \$ BILLIONS)



2025	2025 Market Share	Vendor	2025 Revenue	2025 YTY Growth	2030 Revenue	CAGR (5-year)	2030 Market Share
15	0.6%	Dell Technologies Services	\$ 3.3	-6.3%	\$ 3.7	2.0%	0.5%
16	0.4%	HCLTech	\$ 2.5	3.4%	\$ 3.2	5.2%	0.4%
	99.0%	Rest of Market	\$ 550.7	4.9%	\$ 731.9	5.9%	99.1%
	100.0%	Total Market	\$ 556.5	4.9%	\$ 738.8	5.8%	100.0%

SOURCE: TBR ESTIMATES AND COMPANY DATA

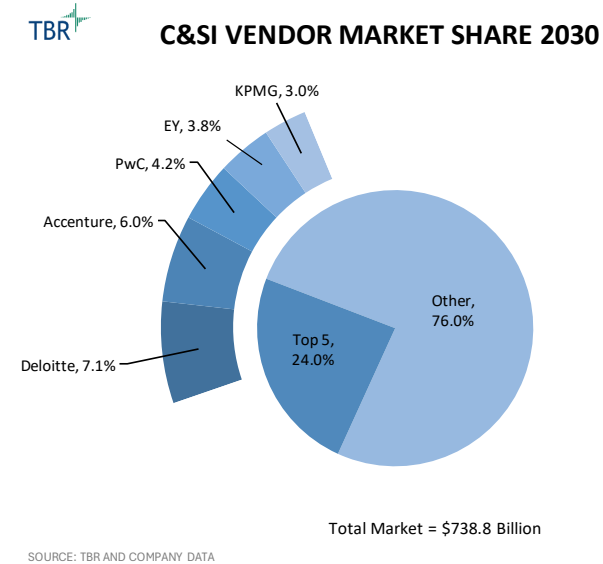
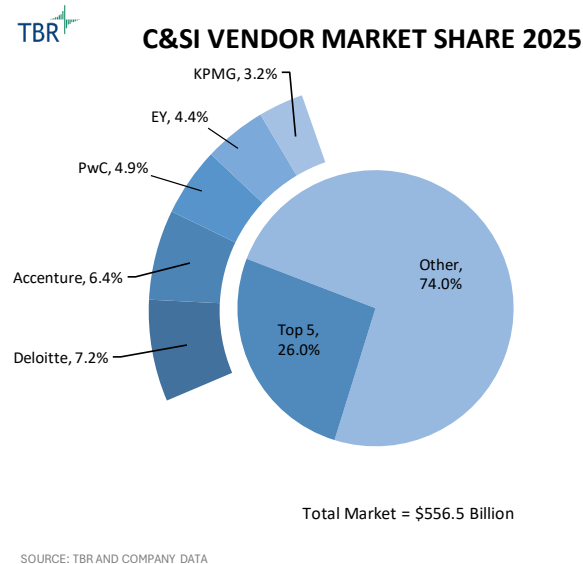
Note: Market share percentages may not total 100% due to rounding.

Forecast Considerations:

- How will both companies use their IT knowledge and design expertise to support clients' AI adoption and capitalize on C&SI opportunities?
- How would digital-oriented acquisitions help both companies improve their value?
- Will their hardware- and engineering-centric roots be enough or will C&SI be needed to highlight portfolio value?

- Although Dell Technologies Services and HCLTech operate through different business models, the two companies have similar-sized C&SI practices and market share. Over the next five years, they will likely have different trajectories as they invest in areas outside of C&SI. Dell Technologies Services would benefit from the broadening of AI adoption from enterprises that require external expertise to deploy and operate complex AI infrastructures. As enterprises invest in GPU-dense systems, data platforms and hybrid cloud, Dell Technologies Services can position itself as the technology specialist responsible for deploying and optimizing these environments. Typically, Dell Technologies Services' C&SI offerings focus on upfront advisory, architecture design and technology road-mapping that support infrastructure modernization, hybrid cloud adoption and AI deployment, which could present opportunities tied to AI adoption. Partnerships with Google, Microsoft and NVIDIA that enhance its hardware and storage capacities and capabilities deepen the value of its design and advisory services, which could accelerate growth if Dell Technologies Services is able to translate the offerings into newer tech.
- HCLTech's efforts to serve as a go-to partner for clients will strengthen relationships, starting with IT modernization, setting the stage for larger-scale transformation that encompasses a wider range of technology solutions such as AI, cloud and software. The company's use of partnerships and acquisitions to strategically incorporate emerging technology across its portfolio will resonate with clients and help drive revenue acceleration.
- The companies' initiatives to support IT modernization align more closely with their technology heritage than with consulting. SI will provide revenue growth for both companies owing to software and technology-solution adoption, but consulting will remain limited to specialized transformations and will not be a key investment area for either.

The Big Four and Accenture will continue to capture the top C&SI vendor market share, owing to their scale and ability to deliver advanced services



Key Takeaways

- The Big Four firms alongside Accenture are projected to maintain their market share leadership from 2025 to 2030, owing largely to their scale and their positioning around technology-led transformation projects. Although client interest in technology transformation took priority over strategy and business consulting projects during 2025, demand will tick up over the next few years as clients reinvent business models and navigate technology as well as geopolitical disruption. The Big Four will lean into adjacent areas such as audit, tax and risk to increase consulting-led engagements.
- Although India-centric vendors are estimated to lose share over the next five years, decreasing from 14.7% of C&SI revenue in 2025 to 14.3% in 2030, the vendors will continue to prioritize large deals that cover a wider range of software and technology adoption with attached managed and integration services. Consulting will remain a specialized and isolated area for the vendors, which will lead to the reduction in market share.
- TBR forecasts the C&SI market will grow at a 5.8% CAGR from 2025 to 2030 due to a resurgence in demand for business and strategy consulting alongside IT consulting, as clients adopt AI, cloud and software solutions to improve efficiency and gain insight across operations. Additionally, the modernization of legacy infrastructure environments to leverage data and embrace newer technology solutions could create opportunities outside of strategy and business consulting, provided vendors can scale their technology consulting expertise.

Scaling specialized consulting to guide business transformation and enable AI adoption across organizations will support the higher end of CAGR growth projections

C&SI Projected 5-year CAGR Leaders

No. 3
Cognizant (Projected 5-year CAGR: 5.4%)

Using consulting to guide its transformation projects will allow Cognizant to increase its C&SI revenue. Although AI-oriented consulting has not yet scaled, Cognizant's efforts to invest in employees and specialized skills will enable it to supplement its existing C&SI strengths in line with technology demands and expand revenues.

TBR cautions that technology-centric IT services companies have long struggled to harness consulting to drive significant and sustained revenue growth. As discussed on Slide 11, these companies often lack key elements: people and/or permission. Cognizant could be the exception, particularly if the company's AI investments help transform its own business model.

No. 5
Capgemini (Projected 5-year CAGR: 5.1%)

Capgemini aims to accelerate its consulting activities around AI strategy, data readiness and road mapping that will ultimately lead to SI and managed services opportunities. C&SI serves as a front-end enabler for AI and intelligent operations, driving new opportunities. Capgemini seeks different opportunities compared to its consulting-led peers Deloitte, PwC and EY, prioritizing technology-oriented services that align with its strengths and positioning around SI (partner-led) services.

This is a safe forecast for Capgemini. If the European market takes off, Capgemini could lean on its prime local positioning and greatly outpace peers. However, the company is heavily exposed to regional pressures. For example, if Europe goes through a recession, Capgemini will struggle to generate revenue growth.

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