

Market Share Analysis: IT Services, Worldwide, 2022

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The worldwide IT services market grew 13.9% in CC in 2022, up from 10.6% in CC in 2021. Infrastructure as a service and consulting remained the largest contributors of this growth. Accenture maintained its No. 1 spot, while Amazon replaced Deloitte as the second largest IT services provider.

Overview

Key Market Findings

- Gartner's 2022 market share research shows that the IT services market grew 13.9% in constant currency (CC), faster than the most recent IT services forecast of 9.6% in CC.
- The infrastructure-as-a-service (IaaS) market maintained strong growth at 29.7% in U.S. dollars (36.1% in CC) in 2022, adding \$25 billion in additional annual spending. The market is dominated by Amazon, Microsoft, Alibaba Group and Google, together accounting for 76.7% of the total market share.
- The Greater China IT services market was the fastest growing region at 14.2% in U.S. dollars (18.9% in CC), reaching \$100.9 billion in 2022.
- The consulting services and the application implementation and managed services segments grew 14.0% in U.S. dollars (20.1% in CC) and 9.2% in U.S. dollars (16.6% in CC), respectively, in 2022. This growth was primarily driven by increased demand for accelerated digital business transformation services.

Vendor Performance Highlights

- Accenture retained its No. 1 position as the world's largest IT services provider. With a 49.2% share, the application implementation and managed services segment is Accenture's largest segment. The segment grew 25.1% in CC, driven by demand in application modernization and maintenance, cloud enablement, and managed security services solutions.
- Of the top 10 IT services providers, Amazon and Microsoft were the only ones with revenue growth of over 35.0% in CC, driven by the increased demand for their cloud-based offerings.
- IBM dropped five positions and is now the eighth largest IT services provider with \$26.1 billion in revenue in 2022. The drop in ranking is linked to the spinoff of its managed infrastructure services business to form Kyndryl in November 2021.
- Of the top 20 IT services providers, Fujitsu and DXC continued to lose market share. Fujitsu dropped from No. 11 in 2021 to No. 14 in 2022 primarily due to slow revenue growth registered in its infrastructure managed services segment. DXC dropped from No. 14 in 2021 to No. 19 in 2022 as it continues to streamline its offerings by divesting more of its businesses, including the sale of its German financial services subsidiary, Fondsdepot Bank, to FNZ Group.

Market Share Data

As part of its market share research, Gartner conducted in-depth analysis into more than 250 IT services providers, ranging from global multibillion-dollar-revenue providers to smaller local IT services providers. The results of this research form the basis of Gartner's sizing of the IT services market, a market that Gartner estimates at \$1.3 trillion in 2022 with an annual growth rate of 7.5% in U.S. dollars and 13.9% in CC.

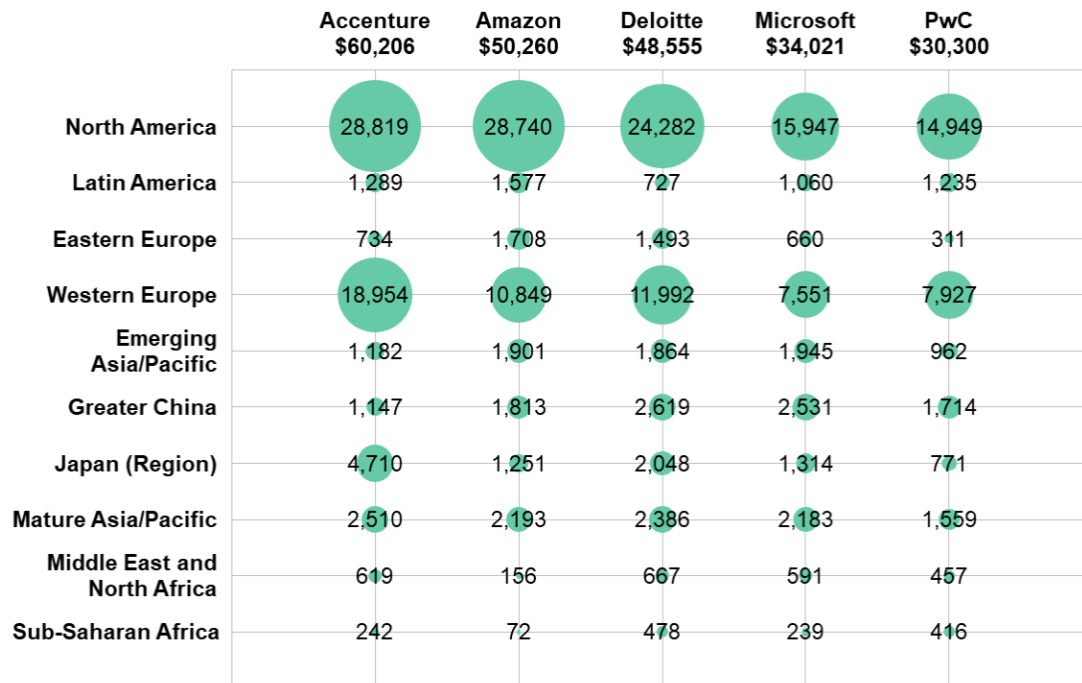
Gartner analyzed published financial results and estimated each vendor's business capabilities to generate the numbers in this document. Gartner gave all vendors the opportunity to validate this analysis.

Figure 1 shows revenue by geographic segment for the top five IT services providers.

Figure 1: Top Five IT Services Providers, Worldwide, 2022

Top Five IT Services Providers, Worldwide, 2022

Revenue (Millions of U.S. Dollars)



Source: Gartner (May 2023)

Note: The value and size of the bubbles represent 2022 Revenue (millions of U.S. dollars), and the color coding represents positive or negative year-over-year change. A green bubble represents positive change and a red bubble represents negative change.

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Table 1 shows the revenue performance of the top 10 IT services providers in 2022.

Table 1: Top 10 IT Services Providers by Market Share, Worldwide, 2022 (Millions of U.S. Dollars)

(Enlarged table in Appendix)

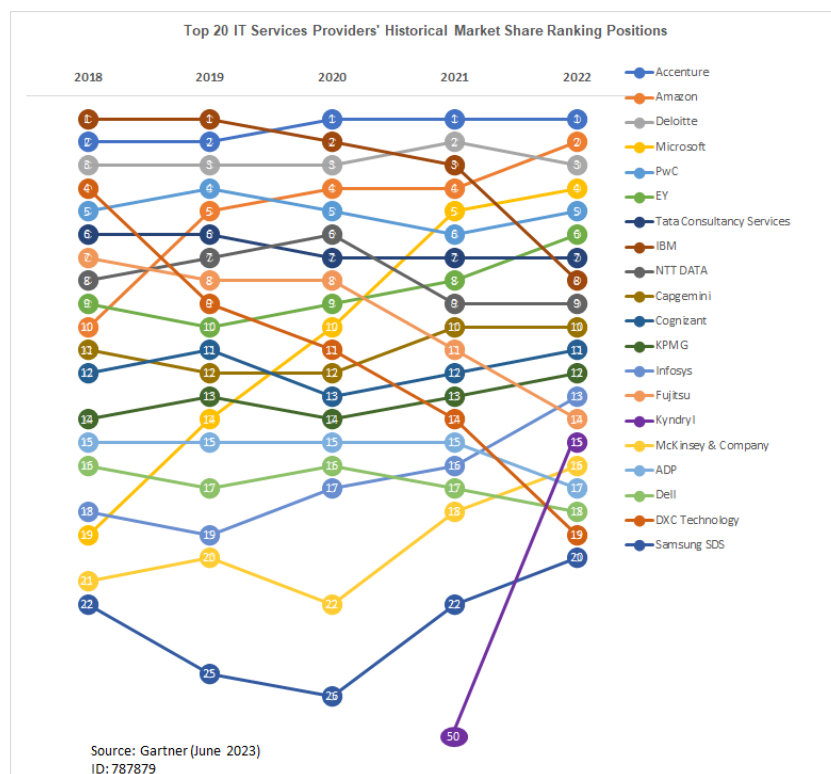
| 2021 Rank | 2022 Rank | Change in Rank | Vendor | 2021 (Revenue in Millions of Dollars) | 2022 (Revenue in Millions of Dollars) | 2021 Market Share (%) | 2022 Market Share (%) | AGR | AGR in Constant Currency |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------------|---------------------------------|---------------------------------------|---------------------------------------|-----------------------|-----------------------|--------|--------------------------|
| 1 | 1 | - | Accenture | 52,698 | 60,206 | 4.3% | 4.6% | 14.2% | 21.0% |
| 4 | 2 | ▲ 2 | Amazon | 37,321 | 50,260 | 3.1% | 3.8% | 34.7% | 40.6% |
| 2 | 3 | ▼ 1 | Deloitte | 40,296 | 48,555 | 3.3% | 3.7% | 20.5% | 26.8% |
| 5 | 4 | ▲ 1 | Microsoft | 26,379 | 34,021 | 2.2% | 2.6% | 29.0% | 35.5% |
| 6 | 5 | ▲ 1 | PwC | 26,033 | 30,300 | 2.1% | 2.3% | 16.4% | 22.1% |
| 8 | 6 | ▲ 2 | EY | 22,916 | 26,417 | 1.9% | 2.0% | 15.3% | 21.5% |
| 7 | 7 | - | Tata Consultancy Services (TCS) | 23,758 | 26,214 | 2.0% | 2.0% | 10.3% | 15.6% |
| 3 | 8 | ▼ 5 | IBM | 38,790 | 26,058 | 3.2% | 2.0% | -32.8% | -28.3% |
| 9 | 9 | - | NTT DATA | 22,302 | 22,745 | 1.8% | 1.7% | 2.0% | 14.8% |
| 10 | 10 | - | Capgemini | 19,823 | 21,431 | 1.6% | 1.6% | 8.1% | 16.8% |
| Other IT Services Vendors | | | | 236,023 | 243,399 | 19.4% | 18.6% | 3.1% | 8.4% |
| TOTAL MARKET | | | | 1,214,598 | 1,305,699 | 45.0% | 45.2% | 7.5% | 13.9% |
| Collectively, the top 10 IT services providers grew 11.6% in U.S. dollars in 2022, down from 16.3% in 2021, with a combined market share of 26.5% in 2022. | | | | | | | | | |
| AGR = annual growth rate | | | | | | | | | |

Source: Gartner (June 2023)

Overall Market Segment Performance Analysis

Using the 2022 market share data, along with historical market share publications, Gartner has analyzed the market share ranking movements over the course of the past five years for the current top 20 IT services providers (see Figure 2).

Figure 2: Top 20 IT Services Providers' Historical Market Share Ranking Positions



Gartner

In 2022, enterprises accelerated their spending on digital transformation projects to upgrade their digital business capabilities. The spike in IT services spending can be linked to enterprise digital business initiatives including AI, customer experience (CX), security and application modernization, among others. As organizations started 2022 with new growth opportunities, we observed the following key trends:

- **Talent crunch:** The increase in enterprise IT spending activity has resulted in a substantial increase in demand for services supporting data science, analytics, AI, CX, cybersecurity and other technologies. This has pushed the demand for a skilled workforce far past capacity for both enterprise clients and IT providers as they struggle to fill the talent gap. The talent shortage has continued to impact the global IT services market. The 2023 Gartner CEO and Senior Business Executive Survey states that attracting and retaining talent is CEOs' top workforce concern, with 26% of CEOs considering talent shortage as a major issue. ¹ When asked about the biggest shift in employee behavior they will be dealing with during 2023 and 2024, CEOs say that they are seeing the highest emphasis on concerns regarding compensation. Further, 78% of respondents indicated that talent scarcity is reaching crisis proportions while 22% said that the talent shortage is a business myth (see [2023 CEO Survey – The Pause and Pivot Year](#)).

- **Buyers continue to spend on digital business initiatives:** The global IT services market grew by 13.9% in CC in 2022. This increase in IT spending clearly shows that enterprises have continued to invest in their digital business initiatives despite ongoing economic challenges. IT investment is no longer seen as a cost of the business; now it is an integral component to operations. More organizations are investing in digital services to grow their business than in digital services to support their core systems. According to the 2022 Gartner Digital Business Buying Behavior Survey, 44% of IT services buyers said that they are seeking to invest in digital business to develop new digital products or services to support their core environments. ² Only 26% said their digital business investments seek to replace core systems (see [Align Your IT Services Go-to-Market Strategy to Your Buyers' Digital Business Spending Priorities](#)).
- **Sustainability is on the CEO's agenda:** Businesses are preparing to find proactive measures to decarbonize the global economy due to the need for sustainability. Global leaders are developing sustainable strategies for their value chains to meet net-zero transition needs. According to Gartner's 2023 CEO and Senior Business Executive survey, sustainability continued to gain importance as one of CEOs' top 10 strategic priorities (see [2023 CEO Survey – The Pause and Pivot Year](#)). ¹ This may lead to resource competition between environmental sustainability and digital transformation. Executives are looking to IT services providers to help them combine these two under the umbrella of “digitally enabled sustainability,” while leveraging technologies like analytics, Internet of Things (IoT), AI, digital twins and others to promote sustainable business practices.

Table 2 shows the IT services segment 2022 growth rate comparison in CC.

Table 2: IT Services Segment 2022 Growth Rate Comparison (Constant Currency)

| Segment | Actual | 1Q23 Forecast | Difference |
|-----------------------------------------------------|--------------|---------------|-------------|
| Consulting | 20.1% | 11.9% | 8.2% |
| Application Implementation and Managed Services | 16.6% | 10.8% | 5.8% |
| Infrastructure Implementation and Managed Services | 5.0% | 3.6% | 1.4% |
| Infrastructure as a Service | 36.1% | 32.3% | 3.8% |
| Business Process Outsourcing | 10.2% | 8.3% | 1.9% |
| Hardware Support | 3.4% | -0.9% | 4.3% |
| Total | 13.9% | 9.6% | 4.3% |
| Note: Percentages might not add up due to rounding. | | | |

Source: Gartner (June 2023)

Top Vendors Analyzed

Accenture

Accenture retained its No. 1 market share position for IT services globally, reaching \$60.2 billion in 2022. It increased its market share to 4.6% in 2022 from 4.3% in 2021.

Accenture's revenue grew 14.2% in U.S. dollars (21.0% in constant currency), which is almost double the overall IT services market growth in 2022. This strong growth was primarily driven by Accenture's continued investments in R&D assets, platforms, industry solutions, the training and development of its people, as well as acquisitions across markets, services and strategic priorities.

By service segment, Accenture achieved the highest growth in application implementation and managed services, where it grew by 25.1% in CC. This was followed by consulting (22.8% in CC) and infrastructure implementation and managed services (13.4% in CC). By geographic segment, over 79% of Accenture's total IT services revenue comes from two regions — North America (\$28.8 billion, a growth of 17.1% in CC) and Western Europe (\$20.2 billion, a growth of 25.5% in CC) — ranking No. 1 in both. In terms of industry group, Accenture grew its revenue by double digits in CC in all verticals with the highest growth in manufacturing and natural resources (40.2% in CC).

With the creation of “Accenture Cloud First” in September 2020, Accenture continues to sharpen the focus of its cloud offering to accelerate the digital transformation initiatives of the global enterprise buyer. This \$3 billion investment through September 2023 has two goals. First, it's meant to bring together Accenture's industry and technology capabilities, deep ecosystem skills, and culture of change with cloud expertise, including cloud migration, and infrastructure and application services. Second, it is expanding Accenture's geographic footprint.

Amazon

Amazon moved up two market share ranks to No. 2 globally, with an IT services market share of 3.8% in 2022. Amazon's worldwide IT services (part of Amazon Web Services [AWS]) revenue grew by 34.7% in U.S. dollars (40.6% in CC) to reach \$50.3 billion. AWS, the largest cloud IaaS provider by revenue, continues to be the driving force behind Amazon's growth within the IT services market. In IaaS, AWS grew 36.0% in U.S. dollars (42.0% in CC) in 2022, showing absolute revenue growth of \$12.7 billion, the highest among IaaS providers.

The vendor's portfolio of products and services is consistently strong and capable and well-aligned with its customers' needs. It continued to ramp up its investments in new infrastructure to meet capacity needs while expanding AWS to new regions. In August 2022, it launched the AWS Middle East Region and in Q3 of 2022 announced plans to launch the AWS Asia/Pacific Region in Thailand.

The communications, media and services vertical (including advertising and marketing technology) continues to be the major contributor to Amazon's IaaS revenue. These customers kept pace with creating high availability and resilient products, optimizing operating costs, decreasing latency and increasing user base. The healthcare and life sciences vertical for Amazon's IaaS business saw high growth fueled by health organizations using AWS to build cloud workloads that can help improve patient care and drive healthcare innovation forward. These innovative methods are increasing operational efficiency and creating new, data-driven care plans. The financial services, retail and manufacturing verticals also contribute significant IaaS revenue to AWS.

Deloitte

Deloitte ranked No. 3 in market share in IT services in 2022. Its revenue grew by 20.5% in U.S. dollars (26.8% in CC) to reach \$48.6 billion in annual IT services revenue in 2022. By service segment, Deloitte saw the highest growth in business process services, with 113.5% growth in U.S. dollars (124.3% in CC). Application implementation and managed services followed, growing by 21.0% in U.S. dollars (27.5% in CC). By geographic segment, Deloitte saw the highest growth in the Middle East and North Africa, with 47.2% growth in U.S. dollars (50.2% in CC). It was followed by North America, the highest contributor to IT services revenue in terms of market share, which grew by 27.8% in U.S. dollars (28.1% in CC).

Deloitte has been expanding its IT services footprints globally in the fields of digital and cloud transformation, generative AI and machine learning, IoT, and intelligent automation. Deloitte is a full-service consulting firm, with a focus on business advisory services that span the advise, implement and operate phases of engagement. Deloitte continues to invest in cloud, AI, cyber, workforce digitization, sustainability and climate, and analytics services to scale its engineering capabilities and augment its deep business expertise. Deloitte also has significant business process services, which grew by 124.3% in CC in 2022, offering a portfolio of insights-driven services to operate critical business and IT functions.

Microsoft

Microsoft moved up one market share position to No. 4 globally for IT services in 2022, increasing its market share to 2.6%. Microsoft's significantly above-market growth of 29.0% in U.S. dollars (35.5% in CC) in IT services is driven by the performance of its Microsoft Azure offering, which includes its IaaS capabilities. Growing 35.0% in U.S. dollars (41.9% in CC) to \$25.9 billion, IaaS makes up the largest portion of Microsoft's \$34.0 billion IT services revenue. The remaining \$8.2 billion saw above-market growth of 13.0% in U.S. dollars (18.6% in CC) and comprises consulting (mainly technology consulting) and implementation (mainly application implementation) services.

Besides offering core compute capability, Microsoft Azure supports emerging use cases and needs for compute and security at the edge. In 2022, Microsoft accelerated investment across the spectrum of intelligent edge devices, from IoT sensors to gateway devices and edge hardware for building, managing and securing edge workloads.

Microsoft intends to leverage its AI supercomputing infrastructure in the cloud to tap the opportunities from use cases based on training large language models and other foundational models and services, including GPT-4 and DALL-E. Microsoft, as the exclusive cloud provider to OpenAI, plans to deploy OpenAI's models across Azure's consumer and enterprise products.

PwC

PwC gained one market share position in 2022 to become No. 5 globally. PwC's global IT services revenue increased by 16.4% in U.S. dollars (22.1% in CC) to reach \$30.3 billion in 2022. A significant share of PwC's revenue comes from its consulting services, which account for 92.4% of PwC's overall IT services revenue. PwC ranks No. 2 in consulting overall. Breaking this down to a more granular level, PwC ranks No. 2 in technology consulting and No. 3 in business consulting. Business process services is the fastest growing segment for PwC, where its revenue increased by 37.9% (in both U.S. dollars and CC) in 2022. In terms of geographic segments, North America (\$14.9 billion in revenue, growth of 22.8% in CC) and Western Europe (\$8.4 billion in revenue, growth of 21.9% in CC) together accounted for over three-quarters of PwC's IT services revenue in 2022. PwC saw the highest growth in CC in the Greater China region, where it grew by 25.2% in CC followed by the Emerging Asia/Pacific region, where it grew by 23.5% in CC.

PwC continues to invest in the training and development of its people, new products and services, and in building its capabilities in technology, cloud, cybersecurity and digital transformation. In June 2021, PwC announced The New Equation strategy, a strategic initiative to invest \$12 billion between 2021 and 2026. This initiative is focused at developing its capabilities around strategy, digital and cloud services, cybersecurity, supply chain, AI, and audit quality. In 2022, PwC made several acquisitions including Sagence, Netrovert's cloud business, eilersconsulting, ID-Consult, Stratus360 and Greenwoods & Herbert Smith Freehills. These acquisitions focused on data analytics, cloud, supply chain and operations, sales force implementation, and financial services.

EY

EY's global IT services revenue increased 15.3% in U.S. dollars (21.5% in CC) to reach \$26.4 billion in 2022. EY improved its market share rank by two positions, to No. 6. In terms of service segments, 95.0% of EY's IT services revenue is generated from business and technology consulting services, where it experienced the second highest growth at 15.4% in U.S. dollars (21.5% in CC) in 2022. Over 75.0% of EY's IT services revenue comes from North America (46.9%) and Western Europe (28.5%). EY experienced the fastest growth in the Emerging Asia/Pacific region and business process services segment in 2022.

EY's consulting division can be segmented into three pillars: business consulting, technology consulting and people consulting. The business consulting practice offers capabilities across the transformation spectrum including enterprise risk, technology risk, finance, and supply chain and operations. The technology consulting practice provides services for data and analytics, cybersecurity, digital and emerging technologies, technology solution delivery, and technology transformation, with people services at the core offering workforce and integrated mobility consulting. EY's Strategy and Transactions service line complements its Consulting service line by offering strategy consulting, corporate finance, merger and acquisition (M&A), and corporate divestiture.

Under its NextWave strategy, EY has committed to invest \$10 billion between FY22 and FY24 to expand its capabilities. As part of this, EY invested a total of \$3.2 billion in FY22 in audit quality, people, innovation and technology. EY will continue to focus on digital enterprise transformation with a strong focus on AI, digital service management and CX and to expand its capabilities in digitization across business functions. In April 2023, EY announced its decision to cancel its Project Everest, originally planned as a means to garner broader IT services growth by spinning off its consulting and tax businesses from its audit business.

Tata Consultancy Services

TCS's global IT services revenue increased by 10.3% in U.S. dollars (15.6% in CC) to reach \$26.2 billion in 2022, primarily as a result of strong demand for CX transformation, cloud migration and operations transformation. TCS maintained its No. 7 position globally in 2022. By geographic segment, TCS derives the majority of its IT services revenue from North America (53.2% of total) where it experienced growth of 18.1% in CC. By service line, Gartner estimates that the application services segment is the largest (57.1% of total) and fastest growing (17.8% in CC) segment for TCS.

As part of a restructuring initiative launched in 2022, TCS has reorganized its operating structure into three customer cohorts — Relationship Incubation Group, Enterprise Growth Group and Business Transformation Group. These allow TCS to focus on the changing digital needs of their clients.

TCS clients leverage the company's offerings that include IT transformation services, end-to-end user experience transformation enabled by digital workplace services, and transformation of its IT research and development operating model, among others. It has clients in all major industries, such as manufacturing and natural resources, healthcare and life sciences, retail, banking and investment services, and insurance.

IBM

IBM's market share ranking in IT services dropped by five positions to No. 8 in 2022. This is primarily due to the spinoff of its managed infrastructure service business unit into Kyndryl in November 2021. IBM's IT services revenue decreased by 32.8% (see Note 1) in U.S. dollars (–28.3% in CC) to reach \$26.1 billion in 2022. As a result of the spinoff, IBM's revenue from the infrastructure services segment declined by 83.1% in U.S. dollars (82.1% in CC) in 2022. The IaaS segment is IBM's fastest growing segment, with growth of 30.4% in U.S. dollars (39.1% in CC) in 2022.

With a remit to focus on AI and hybrid cloud transformation, IBM is advancing its platform-centric approach to compete for the hybrid cloud opportunity. IBM's consulting and implementation services focus on a broad array of verticals and industry capabilities with significant resources focused on banking, communications and media, government, and insurance. IBM's application implementation and managed services offerings include IT modernization and scaling on hybrid cloud environments and helping organizations sustainably transform their business using AI. Working to widen its ecosystem, IBM has announced plans to embed IBM Watson technology into SAP solutions and new programs with Microsoft and AWS to manage and secure multicloud environments. To further align its operating model with this approach, IBM announced a simplified and streamlined management structure that is also reflected in its new segment reporting.

NTT DATA

NTT DATA maintained its No. 9 market share position for IT services globally and generated \$22.7 billion in 2022, an increase of 2.0% in U.S. dollars (14.8% in CC). Its market share fell slightly to 1.7% in 2022, from 1.8% in 2021.

By service segment, NTT DATA derives more than 50% of its total IT services revenue from the application implementation and managed services segment, where it grew by 6.4% in CC in 2022. NTT DATA experienced the second highest growth (30.6% in CC) in its infrastructure implementation and managed services segment, where its market share increased from 22.3% in 2021 to 25.8% in 2022. This was primarily due to its combination with NTT Ltd. in October 2022. By geographic segment, around 90% of NTT DATA's total IT services revenue comes from three regions — Japan (50.3% of total IT services revenue with a growth of 4.1% in CC), North America (20.6% of total IT services revenue with a growth of 14.3% in CC) and Western Europe (19.0% of total IT services revenue with a growth of 26.5% in CC). By industry, NTT DATA achieved double-digit growth in constant currency in all verticals except government and wholesale trade.

NTT DATA made several acquisitions in 2022, including Aspirent Consulting, Apisero, Umvel, Postlight and Vectorform, primarily focused on data analytics, digital transformation, digital design and engineering capabilities. In May 2022, NTT DATA announced that on 1 October 2022, it would combine its existing overseas business with NTT Ltd. to form NTT DATA, Inc., an overseas operating company jointly owned by NTT DATA (55%) and NTT (45%). Specifically, NTT DATA will combine its system integration capabilities with NTT Ltd.'s Edge to Cloud service operation capability to accelerate collaboration in both strategic and tactical aspects to drive the growth of overseas business. In addition to establishing the combined company focused on operations outside of Japan, NTT DATA will establish a company focused on domestic Japanese business in July 2023.

Capgemini

Capgemini's overall IT services revenue grew 8.1% in U.S. dollars (16.8% in CC). With over \$20 billion in IT services revenue in 2022, Capgemini ranks No. 10 globally. More than 90% of Capgemini's IT services revenue comes from two regions — Western Europe (58.5% of total) and North America (33.1% of total). Capgemini saw the fastest growth in the Emerging Asia/Pacific region, which grew 20.5% in CC in 2022. In terms of service lines, Capgemini experienced the highest growth in its application services segment, which grew 20.1% in CC in 2022.

Capgemini's business can be classified into three major pillars: strategy and transformation, applications and technology, and operations and engineering. In 2022, Capgemini increased its investments in innovation, digital, cloud and sustainability services. In 2022, Capgemini acquired 23red, Quantmetry, Braincourt, Quorsus, Aodigy Asia Pacific, Knowledge Expert, Rufus Leonard, and Chappuis Halder & Cie. These acquisitions have strengthened Capgemini's capabilities in sustainability, digital transformation, data science, AI, the Salesforce ecosystem, the Pega platform, design and experience, and transformation in the financial services industry.

Mergers and Acquisitions

Significant M&A activity impacted the IT services market in 2022. Providers have focused on an inorganic strategy to expand into new markets and to acquire next-generation technologies and high-demand skill sets. While many smaller acquisitions are accounted for in Gartner's IT services market share model, the material M&As impacting the revenue growth of key providers during 2021 and 2022 include those shown in Table 3.

Table 3: Significant Mergers and Acquisitions in the IT Services Market, 2021 and 2022

(Enlarged table in Appendix)

| Acquiring Company | Acquired Company | Closing Period |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Ayesa | Ibermática | December 2022 |
| Larsen & Toubro | Mindtree | November 2022 |
| NTT DATA, Inc. | NTT DATA combined its existing overseas business with NTT Ltd. to form NTT DATA, Inc., which is jointly owned by NTT DATA (55%) and NTT (45%) | October 2022 |
| Oracle | Cerner | January 2022 |
| Concentrix | PK Global | December 2021 |
| CDW | Sirius Computer Solutions | December 2021 |
| Kyndryl | IBM's managed infrastructure services business divested | November 2021 |
| Netcompany | Intrasoft International | October 2021 |
| Mandiant | FireEye's product business divested | October 2021 |

Source: Gartner (June 2023)

Evidence

¹ **2023 Gartner CEO and Senior Business Executive Survey:** This survey was conducted to examine CEO and senior business executive views on current business issues, as well as some areas of technology agenda impact. The survey was fielded from July 2022 through December 2022, with questions about the period from 2022 through 2024. One-quarter of the survey sample was collected in July and August 2022, and three-quarters was collected from October through December 2022. In total, 422 actively employed CEOs and other senior executive business leaders qualified and participated. The research was collected via 382 online surveys and 40 telephone interviews. The sample mix by role was CEOs (n = 277); CFOs (n = 95); COOs or other C-level executives (n = 19); and chairs, presidents or board directors (n = 31). The sample mix by location was North America (n = 169), Europe (n = 105), Asia/Pacific (n = 102), Latin America (n = 29), the Middle East (n = 11) and South Africa (n = 6). The sample mix by size was \$10 million in revenue to less than \$50 million (n = 3), \$50 million to less than \$250 million (n = 51), \$250 million to less than \$1 billion (n = 102), \$1 billion to less than \$10 billion (n = 190) and \$10 billion or more (n = 76). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

² **2022 Gartner Digital Business Buying Behavior Survey:** This survey seeks to understand the behavior of IT services buyers to support their digital business — what they are buying, who is buying, and what the use cases are for technology and delivery model preferences. The survey was conducted online from November through December 2022, among 799 respondents from organizations with annual revenue of at least \$50 million or equivalent from North America (33%), Western Europe (25%), Asia/Pacific (24%), and Southern Europe (18%). Industries surveyed include banking and securities, manufacturing, natural resources, communications, media and services, government, retail, wholesale trade, insurance, utilities, transportation, healthcare providers, and education. Qualified respondents are director-level or higher decision makers or decision influencers in the selection of consulting or outsourcing services for their organization. They are also involved in the selection, evaluation or day-to-day management of at least one of the following consulting or outsourcing services within the past two years: business consulting, technology consulting, application implementation, application managed services, infrastructure implementation, infrastructure managed services, infrastructure as a service, hardware support, and business process services. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Acronym Key and Glossary Terms

| | |
|------|------------------------------|
| AGR | Annual growth rate |
| AI | Artificial intelligence |
| AWS | Amazon Web Services |
| CC | Constant currency |
| CEO | Chief executive officer |
| CIO | Chief information officer |
| CX | Customer experience |
| ERP | Enterprise resource planning |
| IaaS | Infrastructure as a service |
| IoT | Internet of Things |
| M&A | Merger and acquisition |
| MENA | Middle East and North Africa |
| R&D | Research and development |
| TCS | Tata Consultancy Services |

Note 1: IBM's 2022 Revenue Growth/Decline

The revenue growth/decline considers the nonrestated revenue on account of divestment of the managed infrastructure service business, Kyndryl, in November 2021.

Document Revision History

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[Ability to Execute Is the Hidden Challenge for Technology and Service Providers in 2023](#)

[Forecast Analysis: Knowledge Employees, Hybrid, Fully Remote and On-Site Work Styles, Worldwide](#)

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Table 1: Top 10 IT Services Providers by Market Share, Worldwide, 2022 (Millions of U.S. Dollars)

| 2021 Rank | 2022 Rank | Change in Rank | Vendor | 2021 (Revenue in Millions of Dollars) | 2022 (Revenue in Millions of Dollars) | 2021 Market Share (%) | 2022 Market Share (%) | AGR | AGR in Constant Currency |
|-----------|-----------|----------------|------------------------------------------|------------------------------------------------|------------------------------------------------|--------------------------|--------------------------|--------|--------------------------------|
| 1 | 1 | - | Accenture | 52,698 | 60,206 | 4.3% | 4.6% | 14.2% | 21.0% |
| 4 | 2 | ▲ 2 | Amazon | 37,321 | 50,260 | 3.1% | 3.8% | 34.7% | 40.6% |
| 2 | 3 | ▼ 1 | Deloitte | 40,296 | 48,555 | 3.3% | 3.7% | 20.5% | 26.8% |
| 5 | 4 | ▲ 1 | Microsoft | 26,379 | 34,021 | 2.2% | 2.6% | 29.0% | 35.5% |
| 6 | 5 | ▲ 1 | PwC | 26,033 | 30,300 | 2.1% | 2.3% | 16.4% | 22.1% |
| 8 | 6 | ▲ 2 | EY | 22,916 | 26,417 | 1.9% | 2.0% | 15.3% | 21.5% |
| 7 | 7 | - | Tata Consultancy Services (TCS) | 23,758 | 26,214 | 2.0% | 2.0% | 10.3% | 15.6% |
| 3 | 8 | ▼ 5 | IBM | 38,790 | 26,058 | 3.2% | 2.0% | -32.8% | -28.3% |
| 9 | 9 | - | NTT DATA | 22,302 | 22,745 | 1.8% | 1.7% | 2.0% | 14.8% |
| 10 | 10 | - | Capgemini | 19,823 | 21,431 | 1.6% | 1.6% | 8.1% | 16.8% |
| | | | Other IT Services | 236,023 | 243,399 | 19.4% | 18.6% | 3.1% | 8.4% |

| Vendors | | | | | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-----------|-----------|-------|-------|------|-------|
| | TOTAL MARKET | 1,214,598 | 1,305,699 | 45.0% | 45.2% | 7.5% | 13.9% |
| Collectively, the top 10 IT services providers grew 11.6% in U.S. dollars in 2022, down from 16.3% in 2021, with a combined market share of 26.5% in 2022. AGR = annual growth rate | | | | | | | |

Source: Gartner (June 2023)

Table 2: IT Services Segment 2022 Growth Rate Comparison (Constant Currency)

| Segment | Actual | 1Q23 Forecast | Difference |
|-----------------------------------------------------|--------------|---------------|-------------|
| Consulting | 20.1% | 11.9% | 8.2% |
| Application Implementation and Managed Services | 16.6% | 10.8% | 5.8% |
| Infrastructure Implementation and Managed Services | 5.0% | 3.6% | 1.4% |
| Infrastructure as a Service | 36.1% | 32.3% | 3.8% |
| Business Process Outsourcing | 10.2% | 8.3% | 1.9% |
| Hardware Support | 3.4% | -0.9% | 4.3% |
| Total | 13.9% | 9.6% | 4.3% |
| Note: Percentages might not add up due to rounding. | | | |

Source: Gartner (June 2023)

Table 3: Significant Mergers and Acquisitions in the IT Services Market, 2021 and 2022

| Acquiring Company | Acquired Company | Closing Period |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Ayesa | Ibermática | December 2022 |
| Larsen & Toubro | Mindtree | November 2022 |
| NTT DATA, Inc. | NTT DATA combined its existing overseas business with NTT Ltd. to form NTT DATA, Inc., which is jointly owned by NTT DATA (55%) and NTT (45%) | October 2022 |
| Oracle | Cerner | January 2022 |
| Concentrix | PK Global | December 2021 |
| CDW | Sirius Computer Solutions | December 2021 |
| Kyndryl | IBM's managed infrastructure services business divested | November 2021 |
| Netcompany | Intrasoft International | October 2021 |
| Mandiant | FireEye's product business divested | October 2021 |

Source: Gartner (June 2023)