IDC MarketScape

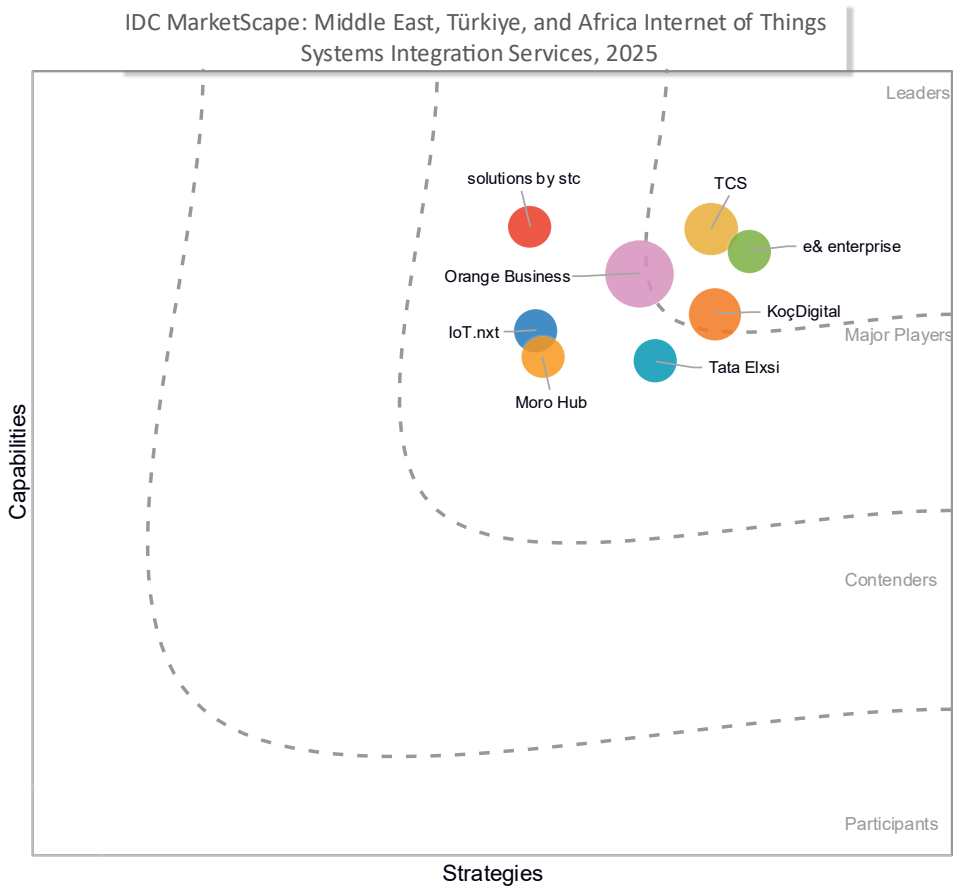
IDC MarketScape: Middle East, Türkiye, and Africa Internet of Things Systems Integration Services 2025 Vendor Assessment

Hyder Aftab Jawairia Asif Tolga Yalcin Mervin Miemoukanda

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.

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.

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 ▪ Evaluation of strategy to make delivery processes stand out from competitors	16.0%
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	5.5%

TABLE 1

Key Strategy Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
	▪ Extent of leveraging external partners in sales processes ▪ Strategy for expanding partnerships to drive sales growth	
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 ▪ Approach to improving revenue per engineer and value enhancement strategies	2.0%
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	41.0%

TABLE 2

Key Capability Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
	▪ Evaluation of connectivity and networking service capabilities and partnerships ▪ Assessment of capabilities in integrating next-generation digital technologies	
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%
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	6.0%

TABLE 2

Key Capability Measures for Success: META IoT Systems Integration Services

Criteria	Definition	Weight
	▪ 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	
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.).

IDC Saudi Arabia

Office #401, 4thFloor, Gate A1
Riyadh Gallery Mall
Imam Muhammad bin Saud Road
King Fahd District
P.O. 18648, Riyadh 11425
Saudi Arabia
Tel: +966 11 434 8282
Fax: +966 11 434 8200