ISG Provider Lens®

Generative AI Services — Large and Midsize

A comparative analysis of service providers focused on unlocking and maximizing the potential of GenAI.

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GenAI is shifting from pilots to enterprise-scale value, driving trust and outcomes

Generative AI (GenAI) has emerged as one of the most transformative technologies reshaping how enterprises approach automation, decision-making, customer engagement and innovation. It has rapidly evolved into a strategic capability embedded across core business functions. GenAI's ability to generate human-like text, synthesize data, automate workflows and act as an intelligent agent has positioned it as a cornerstone of digital transformation.

Over the past year, the GenAI market has transitioned from PoC experiments to enterprise-scale deployments. Organizations are moving beyond isolated use cases and integrating GenAI into end-to-end workflows while building platformized AI ecosystems aligned with business outcomes. The technology is now recognized as a productivity enhancer and a driver of competitive advantage, enabling hyperpersonalization, real-time intelligence and scalable automation.

The global services market for GenAI is segmented into two primary provider categories: large firms with global breadth and resources and midsize players that offer vertical focus and agility.

Each of the following groups has evolved differently over the past year:

- Large providers have expanded their breadth by scaling investments in infrastructure, forming strategic partnerships and developing proprietary models. However, their complexity often slows execution.
- Midsize providers, positioned at the intersection of agility and client proximity in terms of execution, show significant divergence in maturity. While a small group of providers has built structured platforms and consulting frameworks, the majority remain anchored in accelerators, pilots or integration-heavy narratives.

Scaling GenAI needs more than PoC; it needs right-solutioning, orchestration, observability and trust.

From a market adoption standpoint, the pipeline of GenAI projects has expanded considerably. Enterprises are moving beyond PoC and minimum viable products to production deployments across customer service, document processing, software development and analytics-driven workflows. While text-based and conversational interfaces remain the dominant modality, there is a clear demand for multimodal capabilities that integrate text with images, data and audio. However, this demand currently outpaces supply, as most providers have yet to deliver robust multimodal deployments, making large-scale implementations rare. The same applies to deployment approaches, including retrieval-augmented generation (RAG), which continues to be the most common architecture, with fine-tuning and small language models (SLMs) gaining traction in industry-specific contexts. True hybrid strategies that combine these methods are still in development, and a few large and midsize providers have demonstrated evidence of repeatable orchestration frameworks at production scale.

A significant shift is underway as enterprises rearchitect their operations around AI-native business value chains, embedding GenAI across every stage of the workflow, from product development and customer engagement to compliance and supply chain management. Unlike traditional models that treat AI as a support function, AI-native organizations integrate GenAI agents directly into decision-making and execution layers, enabling real-time responsiveness and continuous learning. IT service providers are driving this transformation by designing agentic platforms, reconfiguring workflows and embedding governance frameworks that support autonomous operations.

Within this broader movement, a notable evolution is the rise of agent-as-a-service models, in which modular, plug-and-play GenAI agents manage specific processes such as document intelligence, process automation and customer support. This approach allows enterprises to adopt GenAI incrementally, without overhauling their entire architecture, while still achieving immediate efficiency gains.

Together, these developments mark a transition from digital enablement to AI orchestration, positioning GenAI not just as a tool but as a foundational element of enterprise strategy and service delivery.

Enterprise challenges

As GenAI transitions from hype to operational reality, this rapid evolution has surfaced a complex set of challenges. Enterprises are increasingly grappling with issues related to integration, governance, talent and ROI. These challenges are shaping the pace and direction of adoption, prompting caution and innovation across the ecosystem.

The first and most persistent obstacle is the lack of strategic and organizational readiness. While interest in GenAI is high, many enterprises do not possess the necessary governance frameworks, leadership alignment and cross-functional collaboration required to scale initiatives beyond pilots. Successful adoption demands more than technology; it requires a shift in operating models, decision-making processes and cultural norms to embed AI into the fabric of the business.

Without clear accountability, defined roles and effective change management mechanisms, GenAI projects risk stalling at the PoC stage or delivering fragmented value.

Data trust and explainability also remain critical unresolved issues. GenAI systems, particularly LLMs, often operate as opaque black boxes, making it difficult to understand how decisions are made. This lack of transparency raises concerns around bias, fairness and accountability, especially in regulated industries such as healthcare, finance and public services. Consequently, enterprises are increasingly seeking responsible AI frameworks that can ensure transparency, ethical usage, regulatory compliance and stakeholder trust.

Despite its promise, GenAI adoption is far from being frictionless, with integration complexity as one of the most pervasive challenges. Enterprises often underestimate the effort required to embed GenAI into legacy systems and existing workflows. The architectural demands of GenAI, ranging from data harmonization to model orchestration, require significant reengineering. This complexity is compounded by the need to ensure interoperability across cloud environments, automation platforms and enterprise applications. Providers that rely on tactical integrations or point solutions leave enterprises with fragile architectures that cannot scale sustainably. In contrast, those that deliver modular, API-driven orchestration designed for seamless interoperability are better positioned to win enterprise trust.

ROI measurement is another persistent challenge. In 2024, enthusiasm for pilots masked the lack of clear business cases; however, in 2025, enterprises are demanding measurable value before committing to scale. Many providers still struggle to present evidence of sustained financial impact, often citing qualitative improvements rather than concrete metrics. Enterprises are seeking comarketed case studies, reference deployments and quantified outcomes such as cost savings, productivity gains or customer impact. Providers that are unable to prove repeatable ROI risk being sidelined, regardless of their technical capabilities.

Security and privacy concerns are becoming increasingly pronounced. GenAI models trained on sensitive or proprietary data pose risks related to data leakage, model inversion and unauthorized access. Enterprises are focusing on building secure AI environments, implementing data governance protocols and exploring sovereign LLMs to mitigate these risks. Without strong governance, AI systems inherit biases, deliver unreliable outputs and expose organizations to compliance risks. Enterprises increasingly expect providers not only to deploy GenAI but also to help design end-to-end data architectures that ensure accuracy, interoperability and regulatory compliance.

Market trends driving adoption

In response to the multifaceted challenges surrounding GenAI adoption, ranging from integration complexity and data governance to ROI ambiguity, IT service providers have emerged as key orchestrators of scalable, responsible and value-driven GenAI transformation. Their strategies reflect a deep understanding of enterprise pain points and a commitment to building solutions that are technically robust and aligned with business outcomes. The following trends represent the most significant strategic movements observed across the GenAI ecosystem.

- One of the most prominent trends is the shift from isolated GenAI experiments to enterprisewide platformization. IT service providers are helping clients move beyond PoC deployments by building GenAI platforms that are modular, scalable and integrated with the existing enterprise systems. These platforms enable consistent governance, reusable components and accelerated time to value. Crucially, the repeatability factor, that is, the ability to design once and deploy many times across workflows, business units and industries, is what truly makes platformization and scaling achievable. The platformization approach, which ensures GenAI solutions are developed, tested and deployed in a structured and repeatable manner, is gaining traction as a way to industrialize GenAI adoption across business units.
- GenAI is rapidly expanding its footprint across business functions, industries and technical operations, transitioning from experimental pilots to high-impact, scalable applications. In core business functions, enterprises are leveraging GenAI for automated marketing copy generation, campaign planning, intelligent support bots, financial analysis assistants, personalized recommendations and AI-generated research and compliance summaries. These applications streamline operations and enhance customer engagement. Industry-specific use cases are also gaining momentum, with tailored solutions such as insurance copilots, clinical documentation assistants in healthcare, AI travel planners and EdTech tutors transforming sectoral workflows. On the technology front, GenAI is being deployed for code generation, synthetic data creation, conversational data agents, archival document summarization and AIOps-driven test automation. These diverse applications underscore GenAI's versatility and its growing role as a

strategic enabler of innovation, efficiency and differentiation across the digital enterprise landscape.

- Text-driven use cases also continue to dominate adoption, mainly because they offer the most direct and visible ROI. Customer support copilots, conversational agents and document summarization remain among the most common deployments. These solutions are now common across industries and are increasingly embedded in the existing enterprise workflows. However, despite their prevalence, the market is beginning to recognize the limitations of text-only solutions. Enterprises are presently demanding providers for more advanced capabilities that can integrate multiple modalities, such as text, images, data and audio, to unlock broader business impact. While technical progress is evident, most large and midsize providers are still in the early stages of demonstrating scalable multimodal orchestration, leaving enterprises with limited options beyond pilots.

- Agentic AI is redefining the role of GenAI in enterprise workflows. Rather than serving as passive tools for content generation, AI agents powered by LLMs are now being designed to act autonomously, executing tasks, making decisions and interacting with systems and users. IT service providers are building agent studios and orchestration frameworks that manage the lifecycle of these agents, from development and deployment to monitoring and optimization. These agents are being applied across domains such as customer service (support bots), finance (analysis assistants), compliance (risk monitors) and software engineering (code generators), thereby enabling intelligent automation at scale.

- As GenAI becomes embedded in critical decision-making processes, the need for responsible AI practices has intensified. IT service providers are taking initiatives to develop governance frameworks that address ethical usage, bias mitigation, transparency and regulatory compliance. These frameworks include tools for model explainability, audit trails, data privacy controls and alignment with global standards, such as the EU AI Act. Providers are also embedding ethical by design principles into their GenAI platforms, ensuring that trust and accountability are foundational to every deployment. However, only a few providers have advanced further by developing control towers, observability tools and monitoring dashboards that offer enterprises real-time oversight and operational guardrails, transforming governance from a conceptual framework into an actionable capability.

- Finally, to accelerate innovation and scale, IT service providers are forming strategic partnerships with hyperscalers (AWS, Microsoft Azure and Google Cloud), automation platforms (UiPath and ServiceNow), hardware providers (NVIDIA) and AI specialists. These collaborations provide training and certification, integration with cloud-native services and access to cutting-edge research and tooling. Providers are also engaging in joint go-to-market (GTM) strategies, offering bundled solutions that combine infrastructure, software and services under unified commercial models. However, only a select few have differentiated themselves by using these partnerships not just for enablement but for coinnovation, leveraging unique frameworks, accelerators and domain-specific tools to create specialized offerings and carve out a distinct niche in the market.

Forward drivers and closing implications

The GenAI market is entering a phase of strategic consolidation. While the initial wave of excitement has driven experimentation and investment, the next phase will be defined by operational maturity, responsible scaling and measurable impact. Enterprises must navigate a complex landscape of technical, organizational and ethical challenges to unlock GenAI's full potential. Enterprises are increasingly clear about their expectations from providers: trustworthy, repeatable, cost-efficient and adaptable solutions across industries. Several forces are driving the next phase of adoption, and together they will shape how providers position themselves over the next two to three years.

The first trend is the rise of multimodal and agentic workflows. Text-based deployments dominated the early years of GenAI, but enterprises now expect solutions that seamlessly integrate across modalities such as text, data, images and audio. The ability to chain these modalities into orchestrated workflows, often managed by autonomous or semi-autonomous agents, will be central to unlocking enterprise-scale value. Providers capable of embedding such capabilities into production environments, supported by governance and evaluation frameworks, will distinguish themselves from those that remain constrained at the pilot stage.

The second driver is the emergence of evaluation and LLMOps as a service. Enterprises are increasingly aware that GenAI outputs can be unreliable, biased and challenging to scale without robust evaluation. Providers that treat evaluation as an embedded service, complete with automated pipelines, feedback loops and retraining triggers, will gain a decisive edge. In effect, evaluation maturity is becoming the new benchmark for delivery credibility, akin to quality assurance in traditional IT services.

A third driver is the growing emphasis on cost optimization and efficiency. Enterprises are experiencing the reality of high compute costs and energy demands tied to large-scale GenAI deployments. Consequently, cost-efficiency narratives are no longer optional; they are now a core component of competitive differentiation. Providers that can demonstrate lean runtime architectures, optimized retrievers or hybrid models balancing LLMs and SLMs will align more closely with enterprise priorities.

Concurrently, the market will continue to experience democratization pressures. Enterprises want to extend GenAI beyond technical teams to business users through low-code and no-code interfaces. Providers that can deliver simplified, user-friendly orchestration layers will accelerate adoption across broad enterprise functions, ensuring that GenAI does not remain confined to innovation hubs but becomes embedded in daily workflows.

As GenAI uses cases mature, enterprises will increasingly adopt a hybrid approach that leverages LLMs and SLMs to balance scale with domain precision. LLMs offer broad capabilities for general-purpose tasks; however, their size, cost and lack of contextual specificity can limit their effectiveness in enterprise environments. Enterprises can enhance performance by complementing LLMs with SLMs, which are lightweight, easier to fine-tune and better suited for industry-specific use cases. To facilitate this adoption, IT service providers should build orchestration frameworks that route tasks intelligently between LLMs and SLMs based on complexity, sensitivity and performance needs. This dual-model strategy will enable enterprises to optimize GenAI deployments for versatility and domain depth.

Lastly, as enterprises mature and scale their GenAI adoption, the demand for private AI models deployed within secure, enterprise-controlled environments is expected to rise. Organizations can gain greater control over data access, model behavior and system integration by shifting toward sovereign and private deployments hosted on-premises or in dedicated cloud instances. IT service providers should enable this transition by delivering secure GenAI stacks that combine private LLMs with enterprise-grade governance, encryption protocols, observability and audit capabilities. This approach is particularly critical for regulated industries such as healthcare, finance and government, where data sensitivity and oversight are non-negotiable. Aligning GenAI adoption with cybersecurity and compliance priorities will allow enterprises to innovate confidently while safeguarding intellectual property, customer trust and operational resilience.

In conclusion, service providers are emerging as critical enablers in this journey, offering platforms, frameworks and expertise needed to translate GenAI vision into reality. The trends outlined in this report reflect a maturing ecosystem, one that is moving from hype to value, from pilots to production and from generic tools to domain-specific solutions. As GenAI continues to evolve, organizations that invest in data readiness, talent development, ethical governance and strategic partnerships will be best positioned to lead in the AI-driven economy. The future of GenAI is not solely about technology; it is about transformation, trust and tangible outcomes.

Enterprises are moving from tactical deployments to industrialized and productized GenAI adoption. This shift requires repeatable platforms, real-time evaluation pipelines and secure AI models that balance innovation with trust, helping organizations achieve operational efficiency and strategic differentiation.

Provider Positioning

Page 1 of 6

	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
Accenture	Leader	Not In	Leader	Not In
Accion Labs	Not In	Product Challenger	Not In	Product Challenger
Apexon	Not In	Leader	Not In	Leader
Ascendion	Not In	Leader	Not In	Leader
Atos	Product Challenger	Not In	Rising Star ★	Not In
Birlasoft	Not In	Leader	Not In	Leader
Brillio	Not In	Leader	Not In	Leader
Capgemini	Leader	Not In	Leader	Not In
CGI	Contender	Not In	Contender	Not In
Coforge	Not In	Rising Star ★	Not In	Rising Star ★

Provider Positioning

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	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
Cognizant	Leader	Not In	Leader	Not In
Deloitte	Leader	Not In	Market Challenger	Not In
DXC Technology	Rising Star ★	Not In	Leader	Not In
EPAM Systems	Contender	Not In	Contender	Not In
EXL	Not In	Leader	Not In	Leader
Firstsource	Not In	Leader	Not In	Leader
Fujitsu	Market Challenger	Not In	Market Challenger	Not In
Genpact	Product Challenger	Not In	Product Challenger	Not In
HARMAN	Not In	Leader	Not In	Leader
HCLTech	Leader	Not In	Leader	Not In

Provider Positioning

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	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
Hexaware	Not In	Leader	Not In	Leader
HTC Global Services	Not In	Product Challenger	Not In	Product Challenger
IBM	Leader	Not In	Leader	Not In
IGT Solutions	Not In	Contender	Not In	Contender
Indium Software	Not In	Product Challenger	Not In	Product Challenger
Infosys	Leader	Not In	Leader	Not In
InfoVision	Not In	Product Challenger	Not In	Product Challenger
Innova Solutions	Not In	Product Challenger	Not In	Product Challenger
ITC Infotech	Not In	Product Challenger	Not In	Product Challenger
Kyndryl	Product Challenger	Not In	Contender	Not In

Provider Positioning

	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In
Marlabs	Not In	Contender	Not In	Contender
Mastek	Not In	Product Challenger	Not In	Product Challenger
Microland	Not In	Market Challenger	Not In	Market Challenger
Movate	Not In	Contender	Not In	Contender
NTT DATA	Leader	Not In	Leader	Not In
Orange Business	Product Challenger	Not In	Product Challenger	Not In
Orion Innovation	Not In	Contender	Not In	Contender
Persistent Systems	Not In	Leader	Not In	Leader
Rackspace Technology	Product Challenger	Not In	Product Challenger	Not In

Provider Positioning

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	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
SLK Group	Not In	Contender	Not In	Contender
Sopra Steria	Contender	Not In	Contender	Not In
Stefanini	Not In	Contender	Not In	Product Challenger
TCS	Leader	Not In	Leader	Not In
Tech Mahindra	Product Challenger	Not In	Product Challenger	Not In
TP	Market Challenger	Not In	Market Challenger	Not In
Trianz	Not In	Product Challenger	Not In	Product Challenger
Trigent	Not In	Leader	Not In	Leader
T-Systems	Product Challenger	Not In	Product Challenger	Not In
Unisys	Not In	Leader	Not In	Leader

Provider Positioning

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	Strategy and Consulting Services — Large	Strategy and Consulting Services — Midsize	Development and Deployment Services — Large	Development and Deployment Services — Midsize
UST	Not In	Leader	Not In	Leader
Virtusa	Not In	Leader	Not In	Leader
Visionet	Not In	Product Challenger	Not In	Product Challenger
Wipro	Leader	Not In	Leader	Not In
Xoriant	Not In	Product Challenger	Not In	Contender
Zensar Technologies	Not In	Market Challenger	Not In	Market Challenger

The study provides insights into evolving market trends and competitive dynamics among providers of GenAI services.

- **Strategy and Consulting Services — Large**
- **Strategy and Consulting Services — Midsize**
- **Development and Deployment Services — Large**
- **Development and Deployment Services — Midsize**

Simplified Illustration Source: ISG 2025

Definition

Generative AI (GenAI) has emerged as a pivotal technology in 2025, transforming how industries operate, innovate and deliver value. It goes beyond content creation, spanning realistic images, engaging videos, sophisticated code and personalized text, to redefine business processes, accelerate innovation and unlock unprecedented growth opportunities.

Key trends driving GenAI investments in 2025 include:

- Large language models (LLMs) continue to push boundaries with their ability to generate nuanced, context-aware content across diverse domains, while small language models (SLMs) are gaining traction for their precision in niche applications.
- With advancements in multimodal GenAI, businesses can combine text, image, video and audio processing, enabling enhanced decision-making and a hyperpersonalized CX.
- Automation through agentic systems and LLMOps accelerates content generation, analytics and operations, improving efficiency and time to market.
- Increasing focus on adopting responsible AI practices, emphasizing transparency, bias mitigation and regulatory compliance, ensures ethical deployment while safeguarding user trust.
- GenAI democratizes innovation by powering applications, including personalized CXs (recommendations and chatbots), enterprise workflows (code generation, software testing and compliance automation), and advancements in fields like drug discovery and materials design, enabling businesses of all sizes to harness its potential.

While GenAI's potential is extensive, businesses must address scalability, cost and strategic alignment. Collaborating with experienced providers ensures tailored, production-ready solutions for comprehensive deployment and sustained success.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: Strategy and Consulting Services — Large, Strategy and Consulting Services — Midsize, Development and Deployment Services — Large, Development and Deployment Services — Midsize.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the global market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Large Providers:** Are those with revenues exceeding $4 billion and a workforce of over 100,000 employees. They cater to multiple verticals, often spreading their resources across a broad range of industries. Their primary focus lies in serving large enterprises, often engaging in large transformation projects that require deep expertise, extensive resources, and the ability to manage complex, enterprise-wide innovations. Their deep industry experience, broad service capabilities, and strategic partnerships with technology giants position them as key players in the global digital services landscape.
- **Midsize Providers:** On the other hand, generate less than $4 billion in revenue and typically specialize in 3-4 verticals where they hold strong capabilities and significant revenue share. With a leaner workforce of under 75,000 employees, these providers adopt an agile and flexible approach, making them well-suited to serve both large enterprises and mid-market clients with tailored, industry-specific solutions. They also have strong inherent capabilities and heritage in Digital Engineering services. This combination of domain expertise, flexibility, and a strong focus on innovation positions them as effective partners for businesses seeking to implement cuttingedge technologies with a faster, more agile approach.
- **Specialists:** Are service providers uniquely positioned due to their niche capabilities, which are either deeply embedded in specific verticals (e.g., healthcare, financial services) or concentrated on specialized service areas like AI and analytics. Typically, these providers focus intensely on 2-3 verticals where they hold a significant market share and expertise, allowing them to deliver highly tailored and innovative solutions. With a workforce of fewer than 10,000 employees, specialists leverage their agility and flexibility to serve both large and mid-market enterprises. Their approach emphasizes solution-based problem-solving, making them highly responsive to the specific needs of their clients.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Strategy and Consulting Services — Large

Who Should Read This Section

This report is valuable for providers offering strategy and consulting services globally to understand their market position and for enterprises looking to evaluate these providers.

Large service providers deliver comprehensive AI strategies, crafting holistic road maps that align GenAI adoption with broader corporate goals. Enterprises seek large providers' support to identify, evaluate and ensure the quick conversion of PoCs to production in their journey to adopt GenAI.

Chief information and compliance officers

Should read this to identify providers that ensure seamless GenAI adoption, with a focus on improving data integrity and scalability in their information systems. It also provides insights on providers that embed risk mitigation and governance frameworks into GenAI deployments, ensuring alignment with regulatory and security standards.

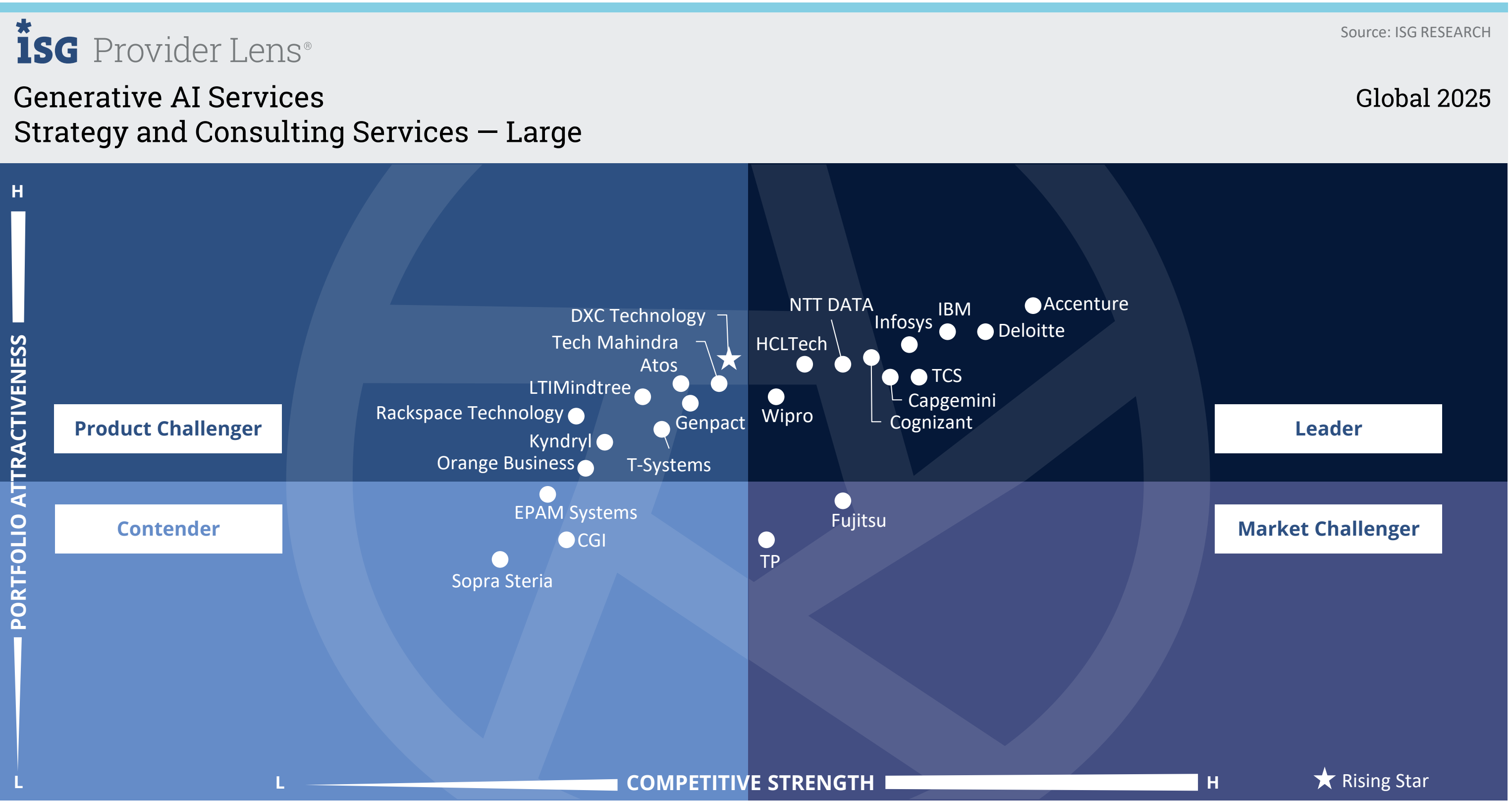
Chief data and AI officers

Should read this to identify providers that can help build the right data governance strategies for implementing GenAI solutions. These strategies ensure data is accurate, secure and used responsibly throughout the AI lifecycle. They also help establish clear policies for data access, quality control and compliance.

Line-of-business managers

Should read this to improve CX, drive innovation and maintain a competitive edge in their respective markets by using GenAI. They can get insights into how service providers enable enhanced personalization, automate customer interactions and optimize service delivery with GenAI solutions. The report also provides insights into how providers are helping businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.

Generative AI Services
Strategy and Consulting Services — Large



This quadrant assesses service providers that are building **GenAI consulting capabilities** to guide enterprises from **experimentation to scaled adoption**, balancing **innovation with governance** and driving **high-value outcomes**.

Hemangi Patel

Definition

In this quadrant, ISG evaluates providers offering strategy and consulting services to help enterprises succeed with their GenAI initiatives. These services for GenAI equip business leaders with the knowledge and tools needed to make investments and informed decisions.

Strategic services assess use cases to identify those with high ROI potential and business value, aligning them with enterprise goals. Consultants evaluate LLMs, considering factors such as model size, training data, desired outputs and cloud infrastructure selection to optimize computing resources. They also aid in developing governance frameworks, implementing fairness checks and establishing monitoring systems to address bias in AI models. Providers offer strategic guidance on developing training programs, establishing clear communication channels and incorporating best practices aligned with evolving needs and industry standards.

By bridging gaps, these services empower enterprises to navigate GenAI's complexities and achieve sustainable success.

Eligibility Criteria

1. Demonstrate **domain-specific experience** to deploy **tailored strategy and consulting offerings** to businesses
2. Provide references for **use cases and PoC** implementations with ideation, value creation, and ROI measurement frameworks and approach details
3. Exhibit **proven knowledge of LLMs, cloud platforms, data science** and best practices for **model training, deployment and integration**
4. **Showcase use cases and PoC** that have transitioned from **strategy and consulting to implementation**
5. Possess a **team** with strong **business and industry acumen**
6. Demonstrate **partnerships** with technology providers, academia and startup ecosystems
7. Showcase investments in **intellectual property accelerators, tools, frameworks and platforms**
8. **Develop and implement ethical frameworks for responsible AI use**, prioritizing data quality, **fairness, transparency and accountability while mitigating bias and hallucination**
9. Facilitate human-in-the-loop strategies and ethical standards
10. **Guide enterprises** and internal teams through GenAI adoption with **effective communication, training and ongoing support**

Observations

Large IT service providers are rapidly building consulting capabilities for GenAI to help enterprises move from experimentation to scaled adoption. Their offerings span end-to-end support, including advisory, prototyping, governance and organizational change, anchored in structured frameworks, reusable assets and experiential environments. A key focus is on navigating use cases and scaling solutions to identify high-value opportunities, validating them through prototypes and accelerating adoption with digital road maps and accelerators.

Responsible AI and governance form the backbone of most approaches. Frameworks embed principles such as fairness, transparency, security and accountability, while governance platforms provide observability, compliance and guardrails to de-risk adoption of AI technologies and mitigate challenges such as hallucinations, bias or IP concerns. Providers are also strengthening workforce readiness and change management to ensure the successful integration of GenAI into organizational processes. Structured training academies, role-based certifications and specialized AI coaching programs build GenAI fluency, prompt engineering skills and innovation mindsets to drive enterprisewide transformation. Innovation hubs and labs are emerging as enablers of experimentation and scaling. These collaborative environments unite domain experts and ecosystem partners to validate use cases and accelerate time to value for GenAI initiatives. Finally, ecosystem partnerships are pivotal, offering enterprises early access to advanced technologies, codeveloped solutions and industry accelerators that enhance their adoption journeys. Overall, large providers position themselves as strategic partners, balancing innovation with governance, speed with responsibility and experimentation with scale to unlock high-value outcomes.

From the 111 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture leads in GenAI adoption by utilizing its AI Navigator for strategic planning, GenAI Studios for cocreation and scaling, and focused training initiatives to build expert capabilities.

Capgemini drives GenAI innovation through global R&D initiatives, engineering-focused solutions and a strong partner ecosystem. Its strategic AI frameworks help enterprises scale AI responsibly while achieving measurable business impact.

Cognizant enables enterprises to scale GenAI through a comprehensive consulting portfolio, global innovation programs and a domain-led GTM strategy. Backed by proprietary platforms and responsible AI frameworks, the company delivers tailored solutions across industries.

Deloitte drives end-to-end GenAI adoption through strategy, PoCs, modernization and governance, while its Academy for AI builds enterprisewide skills, all anchored in its Trustworthy AI™ framework for responsible and secure deployment.

HCLTech offers a holistic GenAI approach that integrates strategic planning, skill building and hands-on innovation labs, ensuring clients achieve seamless, responsible and scalable AI adoption across their organizations.

IBM's AI Consulting Advantage platform accelerates secure, scalable solution delivery and drives measurable business value. The firm is complemented by a strong governance framework and strategic ecosystem partnerships, enabling enterprises to adopt trusted AI solutions.

Infosys combines a GenAI consulting portfolio, structured frameworks and deep strategic partnerships with hyperscalers and tech leaders to deliver innovative AI-led transformation to enterprises.

NTT DATA combines strategic consulting, organization-wide GenAI skill development and its GenAI TechHub innovation platform to help clients identify opportunities, design solutions and deploy secure, scalable GenAI across industries.

TCS' GenAI strategy and consulting approach blends the DATOM™ framework for maturity-led road maps, the 5A Responsible AI model for ethical governance and the AI Experience Zone for practical experimentation, enabling enterprises to adopt GenAI with measurable value.

Wipro enables confident GenAI adoption through end-to-end advisory, robust governance via its AI Control Center and a practice-first prototyping approach that delivers quick wins while managing risks and ensuring scalability.

DXC Technology (Rising Star) helps clients realize GenAI value by prioritizing high-impact use cases, managing organizational change and implementing end-to-end governance aligned with strategic goals.

Strategy and Consulting Services — Midsize

Who Should Read This Section

This report is valuable for providers offering strategy and consulting services globally to understand their market position and for enterprises looking to evaluate these providers.

Midsize service providers focus on select industries like healthcare, retail and manufacturing, offering deep expertise in their challenges and regulations. Enterprises seek guidance from midsize service providers to develop a comprehensive Gen AI strategy, where their key needs include data collection, integration and cleaning, along with insights to select the right GenAI models.

Chief information and compliance officers

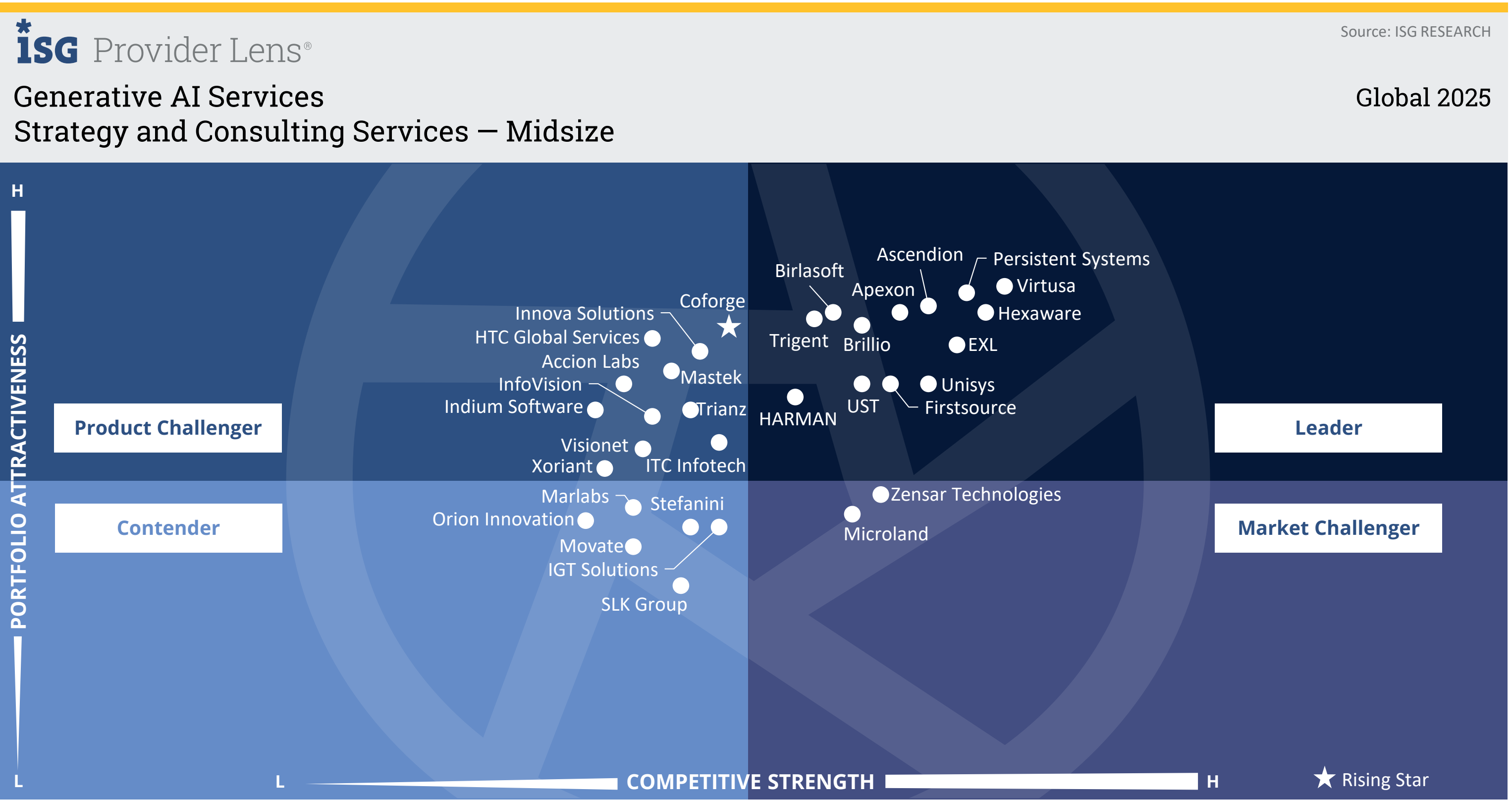
Should read this to identify providers that ensure seamless GenAI adoption, with a focus on improving data integrity and scalability in their information systems. It also provides insights on providers that embed risk mitigation and governance frameworks into GenAI deployments, ensuring alignment with regulatory and security standards.

Chief data and AI officers

Should read this to identify providers that can help build the right data governance strategies for implementing GenAI solutions. These strategies ensure data is accurate, secure and used responsibly throughout the AI lifecycle. They also help establish clear policies for data access, quality control and compliance.

Line-of-business managers

Should read this to improve CX, drive innovation, and maintain a competitive edge in their respective markets by using GenAI. They can get insights into how service providers enable enhanced personalization, automate customer interactions and optimize service delivery with GenAI solutions. The report also provides insights into how providers are helping businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.



This quadrant evaluates service providers that offer GenAI **strategy and consulting** services to guide enterprises through **exploration, strategy development, governance** and **compliance** by delivering **tailored solutions** that align with business goals.

Gowtham Kumar Sampath

Definition

In this quadrant, ISG evaluates providers offering strategy and consulting services to help enterprises succeed with their GenAI initiatives. These services for GenAI equip business leaders with the knowledge and tools needed to make investments and informed decisions.

Strategic services assess use cases to identify those with high ROI potential and business value, aligning them with enterprise goals. Consultants evaluate LLMs, considering factors such as model size, training data, desired outputs and cloud infrastructure selection to optimize computing resources. They also aid in developing governance frameworks, implementing fairness checks and establishing monitoring systems to address bias in AI models. Providers offer strategic guidance on developing training programs, establishing clear communication channels and incorporating best practices aligned with evolving needs and industry standards.

By bridging gaps, these services empower enterprises to navigate GenAI's complexities and achieve sustainable success.

Eligibility Criteria

1. Demonstrate **domain-specific experience** to deploy **tailored strategy and consulting offerings** to businesses
2. Provide references for **use cases and PoC** implementations with ideation, value creation, and ROI measurement frameworks and approach details
3. Exhibit **proven knowledge of LLMs, cloud platforms, data science** and best practices for **model training, deployment and integration**
4. **Showcase use cases and PoC** that have transitioned from **strategy and consulting to implementation**
5. Possess a **team** with strong **business and industry acumen**
6. Demonstrate **partnerships** with technology providers, academia and startup ecosystems
7. Showcase investments in **intellectual property accelerators, tools, frameworks and platforms**
8. **Develop and implement ethical frameworks for responsible AI use**, prioritizing data quality, **fairness, transparency and accountability while mitigating bias and hallucination**
9. Facilitate **human-in-the-loop strategies** and ethical standards **Guide enterprises** and internal teams through GenAI adoption with **effective communication, training and ongoing support**

Observations

Midsize providers entered 2025 with a more defined but uneven presence in the GenAI strategy and consulting landscape. Innovative players have strengthened their market positioning by building structured advisory frameworks, embedding GenAI into broader transformation road maps and linking governance and risk controls to measurable business outcomes. Their ability to frame enterprisewide narratives makes them credible partners in boardroom-led conversations.

Many midsize providers continue to operate with fragmented or delivery-oriented consulting approaches. Their narratives are often tied narrowly to heritage verticals or operational improvements, creating perceptions of them as integrators rather than strategic advisors. While branded platforms and accelerators are increasingly common, only a small fraction of these offerings are productized into repeatable consulting assets capable of influencing enterprise strategy effectively.

The analysis also highlights that enterprises demand greater clarity around ROI, public case references and cross-industry consulting maturity. While the banking, financial services and insurance sector (BFSI) and CX remain saturated battlegrounds, healthcare, manufacturing and regulated domains stand out as underserved areas where providers have yet to deliver consistent advisory depth. The trajectory for 2025 suggests midsize providers must evolve rapidly from solution storytelling to platform-backed, advisory-driven models that position GenAI as a core driver of enterprise-scale transformation, or risk being overshadowed by competitors that have already made this shift.

From the 111 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon offers a $10,000 entry point for low-complexity prompts, escalating with agent complexity and data orchestration. Each pricing tier includes forecasted time-to-value, sets hallucination risk thresholds and incorporates GPU cost modeling.

Ascendion

Ascendion has evolved its GenAI strategy around an engineering-led advisory approach. It emphasizes agent-driven software development lifecycle (SDLC) transformation and modular studio environments for internal proof of platform discipline.

birlasoft

Birlasoft is evolving its GenAI consulting to leverage structured platform enablers. It focuses on vertical-specific solutions and domain-calibrated SLM strategies, gaining traction in life sciences, energy and communication-centered industries.

Brillio

Brillio enhances its advisory layer with industry-specific playbooks and accelerators for telecommunications (churn, network co-pilots), healthcare (prior auth, GenAI triage) and banking, financial services and insurance (BFSI) (cheque automation), helping deliver high-impact, high-readiness zones and avoid generic workshops.

EXL

EXL has repositioned its GenAI strategy to emphasize vertical orchestration and governance-based consulting, introducing platform-led agent design frameworks, expanding domain-specific LLM coverage and deepening co-sell alignment with hyperscaler partner ecosystems.

firstsource

Firstsource has advanced its GenAI consulting through agentic platform strategy investments, vertical-aligned copilots and the DEEP lifecycle, supported by Labs, internal deployments and ROI-based pricing to scale responsible AI adoption across regulated industries.

HARMAN

HARMAN Digital Transformation Solutions operationalizes domain-specific GenAI stacks such as HealthGPT and ForecastGPT, enhancing agent orchestration via Genesis while embedding governance checkpoints within LLMOps.

HEXAWARE

Hexaware has repositioned its GenAI consulting with Decode AI and AssessIQ, introduced agentic accelerators across verticals and operationalized security-led advisory with integrated governance frameworks across solution design and delivery.

Persistent

Persistent Systems has enhanced its strategic posture by embedding agentic blueprinting into advisory flows, expanding cocreation studios globally and aligning with hyperscalers through structured GTM models and private LLM engagement pathways.

Trigent

Trigent's GenAI advisory strategy centers on UnityGPT frameworks, IRA and Trinity agents, and agentic design via AI Studio, with a future focus on modular orchestration, federated agent mesh and domain-specific GPT stacks.

unisys

Unisys has expanded its GenAI consulting through internal assistant deployments, use-case-driven engagements in QSR and CPG, and road map commitments focused on federated agent orchestration, responsible AI and verticalized advisory frameworks.

UST

UST has expanded its GenAI advisory with modular risk assessment workshops, AWS cocreated strategy tools and large-scale internal enablement, repositioning its consulting services to support business-aligned GenAI transformation across core verticals.

virtusa

Virtusa has repositioned its GenAI advisory model around distributed AI Labs and modular service lanes, supporting vertical BUs with platform-integrated consulting workflows that enhance visibility, ROI mapping and post-deployment optimization.

Coforge

Coforge (Rising Star) has evolved into a vertically aligned, platform-led GenAI partner pairing reusable IP with industry-specific problem solving. Its focus on agentic workflows, internal enablement and responsible AI governance positions the company for large-scale transformations.

Unisys

Leader

“Unisys stands out with a framework-anchored consulting approach to GenAI, integrating governance, outcome-led advisory and internal operational validation to drive enterprise-scale transformation with strategic depth and delivery accountability.”

Gowtham Kumar Sampath

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys offers a pragmatic, enterprise-aligned consulting model grounded in domain specificity, platform reusability and trusted governance. Its strategic focus is on internal GenAI system rollout, collaborative cocreation with clients and composable frameworks such as the Service Experience Accelerator. Its consulting teams work with delivery pods to translate AI potential into practical ROI with engagements across key verticals.

Strengths

Platform-led advisory foundation: Unisys differentiates its advisory work with Service Experience Accelerator, a composable GenAI technology framework that integrates tenant-controlled deployments, prompt preprocessing, semantic orchestration and trusted guardrails. This foundation gives consulting teams a reliable springboard for ideation and execution, reducing handoff friction across the strategy-to-implementation continuum.

Domain-centric modularity: Unisys offers verticalized knowledge assistants and AI playbooks tailored for different industries. These are backed by industry-trained models and domain-specific ontology layers, reflecting a practical understanding of use case localization and ROI delivery.

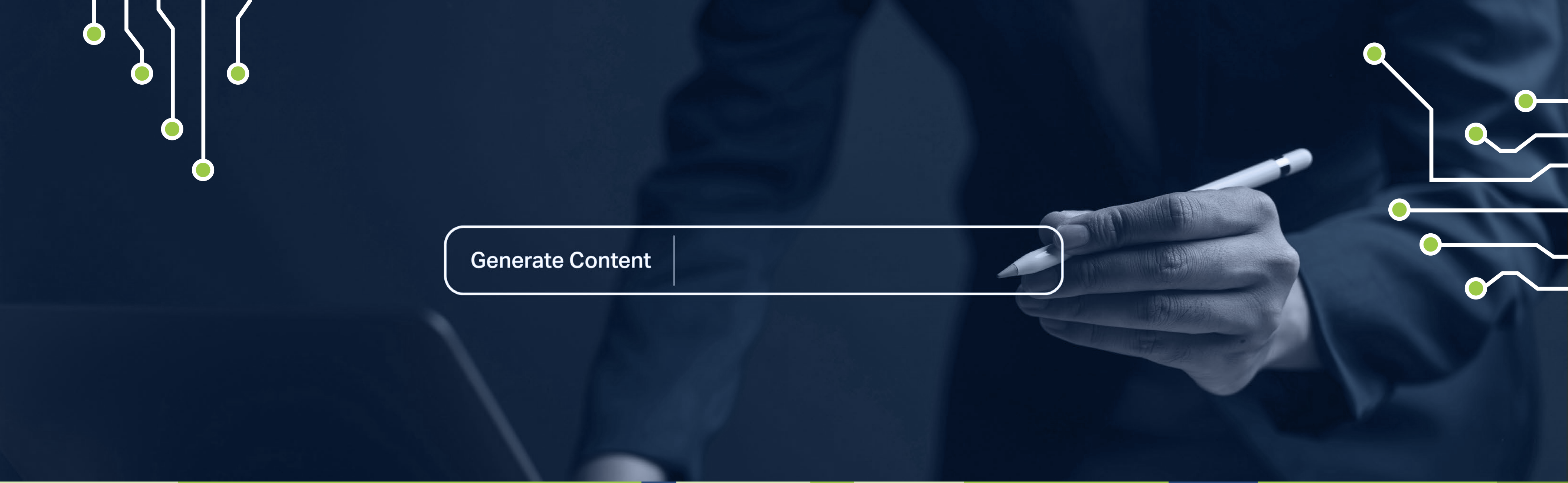
Unisys embeds responsible AI principles across strategy engagements, deploying internal assistants for ethics, compliance and DevSecOps across over 10 functions with governance engines that inform client advisory services.

Outcome-linked client engagements: Unisys’ strategic consulting maturity is reflected in its cocreation with clients, where ML-led ticket optimization and microstate mapping delivered quantifiable business benefits. Its consulting teams closely collaborate to define hypotheses, translate them into algorithms and tie outputs to measurable KPIs, a model Unisys replicates in enterprise support, logistics and retail.

Caution

Despite strong solution delivery, Unisys needs visible GenAI-specific GTM packages for consulting services, including brand transformation kits and modular advisory bundles tailored for industry or pilot readiness.

It should formalize GenAI consulting playbooks, reusable transformation frameworks and consulting accelerators.



Development and Deployment Services — Large

Who Should Read This Section

This report is valuable for providers offering development and deployment services globally to understand their market position and for enterprises looking to evaluate these providers.

Large service providers deliver comprehensive AI strategies, crafting holistic road maps that align GenAI adoption with broader corporate goals. Enterprises engage with large service providers to address complex data, security and compliance requirements, seeking end-to-end solutions that are adaptable and customizable to fit specific enterprise requirements.

Line-of-business managers

Should read this report to gain insights into providers that can assist in managing GenAI solutions and aligning them with business goals and customer needs. The report offers insights into providers' capabilities in selecting the right GenAI technologies and strategies for smooth integration into existing workflows. It also highlights how these solutions can drive efficiency, improve decision-making and enhance customer engagement.

Chief data and AI officers

Should read this to identify providers that can help build the right data governance strategies for implementing GenAI solutions. The report outlines how providers ensure data quality, security and compliance throughout the AI lifecycle. It also highlights how providers can assist in creating scalable, transparent frameworks for managing data across GenAI applications.

Chief information officers

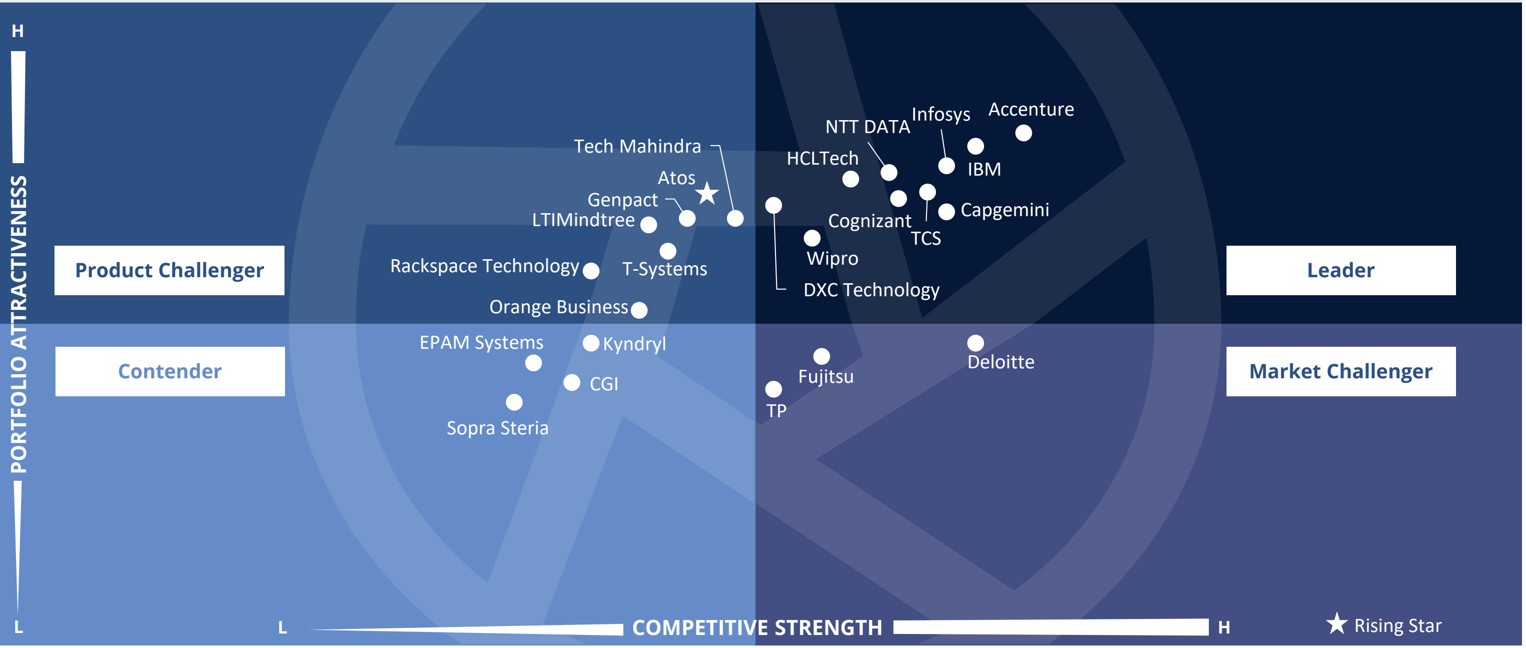
Should read this to identify providers that ensure seamless GenAI adoption, focusing on improving data integrity and scalability in their information systems. The report provides insights on how providers optimize system architecture to support GenAI solutions at scale. It also provides insights into provider capabilities to ensure data accuracy and consistency while maintaining performance and security standards.

ISG Provider Lens®

Source: ISG RESEARCH

Generative AI Services
Development and Deployment Services – Large

Global 2025



This quadrant assesses service providers that deliver **end-to-end GenAI development and deployment capabilities,** embedding **responsible AI, industry-specific platforms, and scalable architectures** to drive **secure, measurable impact.**

Hemangi Patel

Definition

In this quadrant, ISG evaluates providers offering development and deployment services to help enterprises in the entire process, from creating PoCs to producing GenAI solutions while providing monitoring and management support.

Providers should assist in implementing cost-effective cloud infrastructure tailored to industry-specific needs to optimize resource allocation for efficient model training and deployment while minimizing time and costs. They play a crucial role in selecting the right platforms and tools for data preprocessing, model training and experimentation. They should also offer support for fine-tuning pretrained models and facilitating their integration and deployment for specific use cases. Establishing LLMOps practices for monitoring and retraining models is vital for optimizing performance. In addition, providers must implement security protocols encompassing encryption, access control and compliance with industry-specific data privacy regulations.

By partnering with providers to reduce costs and management efforts, enterprises can focus on core business while leveraging GenAI's potential.

Eligibility Criteria

1. Demonstrate a deep **understanding of cloud platforms** and resource allocation for **training and running models** based on use cases
2. **Optimize training** for utilizing **compute resources efficiently** in **minimal time**
3. **Fine-tune pretrained models and SLMs** for industry-specific requirements and understand the nuances of domain data
4. **Build a robust data science team** with expertise in GenAI-specific **data cleaning, feature engineering and model fine-tuning**
5. Follow definitive **LLMOps practices** for **continuous monitoring, model retraining and optimizing the performance** of fine-tuned models
6. **Have a deep understanding of infrastructure** requirements for deploying GenAI models, including **containerization and scalable server** setups
7. **Establish strong security practices for model deployment, data transmission and access controls**
8. **Showcase advanced, impactful use cases and solution demonstrations** that highlight expertise in developing and deploying GenAI solutions aligned with enterprise objectives
9. Showcase capability and use cases in **building and deploying multimodal applications**

Observations

Large IT service providers are enhancing their GenAI development and deployment capabilities to help enterprises scale from pilot programs to full production environments. Their focus spans full lifecycle support, including model development, fine-tuning, orchestration, deployment and LLMOps integrated into unified platforms that streamline design, construction and operations. Providers ensure trust, explainability and compliance by embedding responsible AI principles into deployment pipelines. A major priority is accelerating time to value through industry-specific platforms, prebuilt blueprints and reusable accelerators that enable enterprises to rapidly experiment, validate and scale GenAI adoption. Many are extending capabilities into agentic AI, with frameworks supporting orchestration, memory, monitoring and continuous improvement across the agent lifecycle.

Providers are also investing in enterprise-grade infrastructure and models such as GPU-optimized platforms, energy-efficient small language models, private AI deployments for regulated industries and sovereign AI solutions that address data sovereignty, cost efficiency and sustainability. These capabilities enable scalable, secure and domain-tailored adoption. By embedding GenAI into IT operations, software engineering, legacy modernization and CX platforms, providers help organizations optimize productivity, modernize technology estates and drive measurable impact. Partnerships with hyperscalers, hardware innovators and ISVs further enhance scalability, performance and industry relevance. Overall, service providers position themselves as end-to-end enablers of GenAI adoption, balancing security and governance while delivering industry-focused, scalable solutions.

From the 111 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture combines AI Refinery™ for scalable GenAI and agentic AI, Azure AI Foundry for secure and responsible deployments, and GenWizard for transformation and modernization. This approach delivers industry-specific solutions that accelerate adoption and improve efficiency.

Capgemini

Capgemini accelerates GenAI adoption through frameworks such as RAISE™ for rapid deployment, IDEA™ for data modernization and Resonance AI for scaling business impact. Together, these frameworks ensure enterprises transition from strategy to execution with speed and accuracy.

cognizant

Cognizant drives GenAI innovation through deep partner codevelopment, domain-specific reference architectures and its Neuro® suite of platforms that streamline the AI lifecycle, ensuring secure, scalable deployment.

DXC TECHNOLOGY

DXC Technology enables secure and scalable GenAI adoption through its Private AI foundation, AI Workbench platform and Microsoft Azure OpenAI partnership, accelerating integration and enhancing productivity.

HCLTech

HCLTech leverages its strategic alliance with OpenAI and robust AI platforms to streamline enterprisewide GenAI deployments, enabling seamless integration, enhanced productivity and fast realization of business value.

IBM

IBM is advancing GenAI through custom AI-optimized hardware, agile and cost-effective Granite 3.0 enterprise LLMs and industry-specific solutions codeveloped with SAP. This integrated approach enables scalable business-ready AI deployments across industries.

Infosys integrates Enterprise SLM, Topaz and Agentic AI Foundry to deliver secure, scalable and responsible GenAI solutions. These capabilities enable enterprises to build custom models, deploy domain-specific agents and accelerate AI-driven transformation.

NTT DATA leverages its capabilities in small language model innovation, global partnerships and private AI solutions to deliver tailored, secure and high-performing GenAI deployments across industries and regions.

TCS demonstrates strong GenAI development and deployment capabilities through platforms such as WisdomNext™ for multivendor model adoption, GenAI Assistant for SDLC integration and MasterCraft™ for legacy modernization.

Wipro enables end-to-end GenAI adoption through its Enterprise AI-Ready Platform, a portfolio of industry-specific solutions and the SLICE suite for multicloud optimization. This approach delivers scalable deployments and fosters rapid innovation.

Atos Group (Rising Star) combines agent-based automation through its Polaris AI Platform with advanced HPC infrastructure using BullSequana systems and governance-focused GenOps services to support enterprise-scale GenAI deployment.

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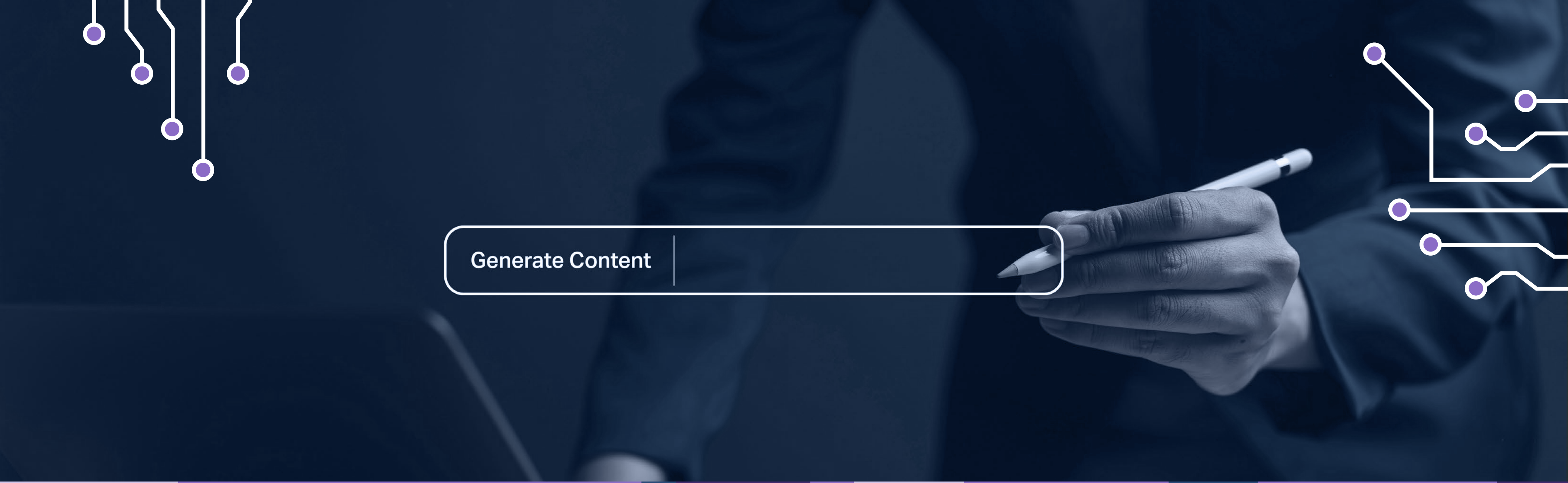


Development and Deployment Services — Midsize

This report is valuable for providers offering development and deployment services globally to understand their market position and for enterprises looking to evaluate these providers.

Midsize providers offer highly customizable solutions, tailoring GenAI deployments to specific industry needs such as healthcare data management or retail personalization, delivering impactful results. Enterprises seek seamless GenAI development and deployment from midsize service providers for needs that include scalable data pipelines, model training and integration into existing systems.

Line-of-business managers

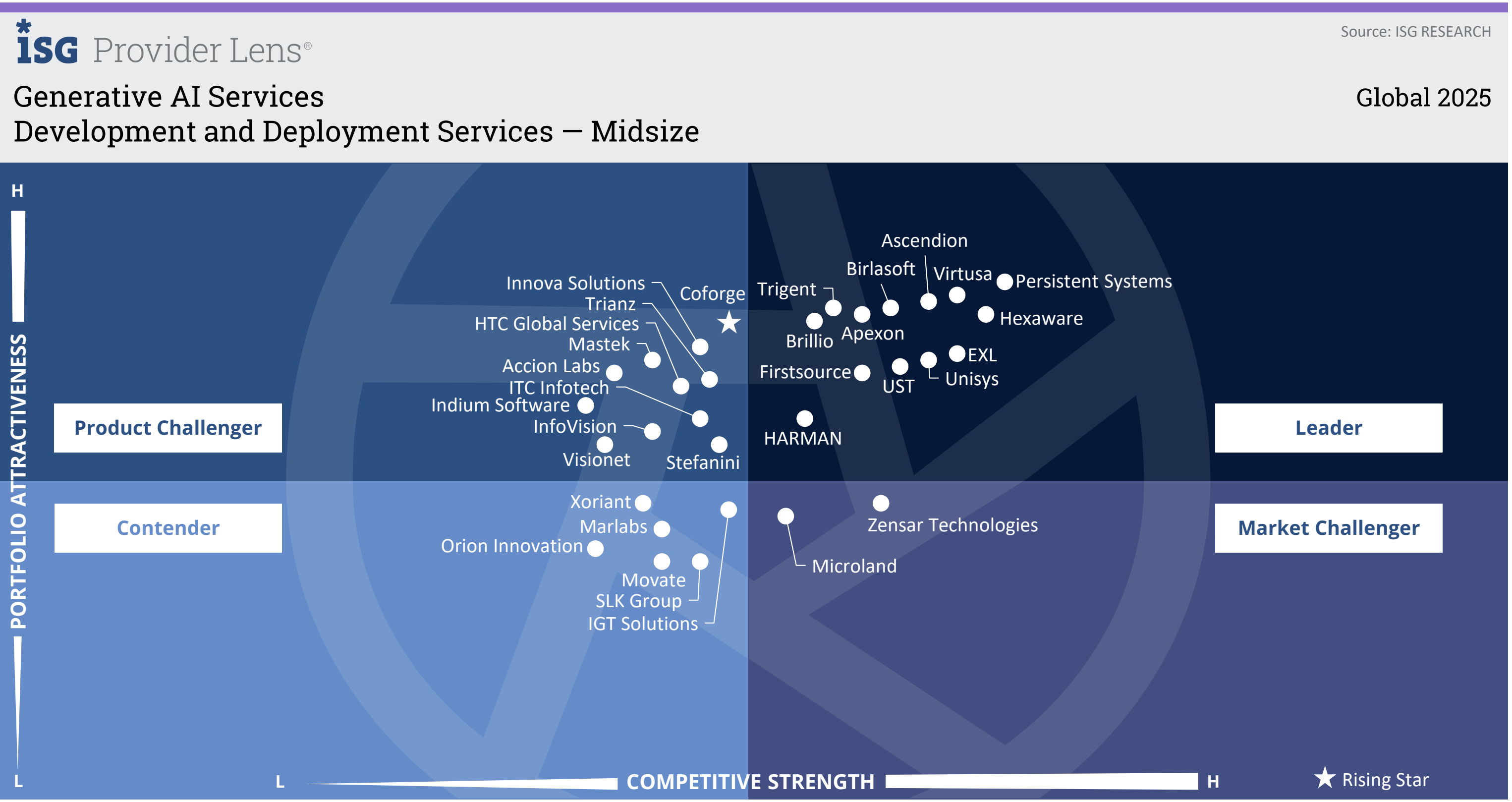
Should read this report to gain insights into providers that can assist in managing GenAI solutions and aligning them with business goals and customer needs. The report offers insights into providers' capabilities in selecting the right GenAI technologies and strategies for smooth integration into existing workflows. It also highlights how these solutions can drive efficiency, improve decision-making and enhance customer engagement.

Chief data and AI officers

Should read this to identify providers that can help build the right data governance strategies for implementing GenAI solutions. The report outlines how providers ensure data quality, security and compliance throughout the AI lifecycle. It also highlights how providers can assist in creating scalable, transparent frameworks for managing data across GenAI applications.

Chief information officers

Should read this to identify providers that ensure seamless GenAI adoption, focusing on improving data integrity and scalability in their information systems. The report provides insights on how providers optimize system architecture to support GenAI solutions at scale. It also provides insights into provider capabilities to ensure data accuracy and consistency while maintaining performance and security standards.



This quadrant evaluates providers that offer GenAI **development** and **deployment** services, with the **technical expertise** to **build, fine-tune** and **integrate GenAI models** into enterprise environments, ensuring **security, compliance** and smooth implementation.

Gowtham Kumar Sampath

Definition

In this quadrant, ISG evaluates providers offering development and deployment services to help enterprises in the entire process, from creating PoCs to producing GenAI solutions while providing monitoring and management support.

Providers should assist in implementing cost-effective cloud infrastructure tailored to industry-specific needs to optimize resource allocation for efficient model training and deployment while minimizing time and costs. They play a crucial role in selecting the right platforms and tools for data preprocessing, model training and experimentation. They should also offer support for fine-tuning pretrained models and facilitating their integration and deployment for specific use cases. Establishing LLMOps practices for monitoring and retraining models is vital for optimizing performance. In addition, providers must implement security protocols encompassing encryption, access control and compliance with industry-specific data privacy regulations.

By partnering with providers to reduce costs and management efforts, enterprises can focus on core business while leveraging GenAI's potential.

Eligibility Criteria

1. Demonstrate a deep **understanding of cloud platforms** and **resource allocation** for **training and running models** based on use cases
2. **Optimize training** for utilizing **compute resources efficiently** in **minimal time**
3. **Fine-tune pretrained models and SLMs** for industry-specific requirements and understand the nuances of domain data
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8. **Showcase advanced, impactful use cases and solution demonstrations** that highlight expertise in developing and deploying GenAI solutions aligned with enterprise objectives
9. Showcase capability and use cases in **building and deploying multimodal applications**

Observations

Midsize providers are moving into 2025 with clearer ambitions in GenAI development and deployment, but the market continues to reflect stark contrasts in technical maturity. A select group of leading firms has demonstrated the ability to move beyond pilots, operationalizing orchestration frameworks with multimodal RAG, tool-enabled agents, evaluation pipelines and telemetry-driven governance. Their progress shows that midsize providers can compete credibly with large integrators when execution is productized and scaled.

For the majority, however, orchestration remains at an early stage, with PoC often repackaged as enterprise solutions and evaluation practices limited to manual or semi-structured methods. Delivery maturity is frequently narrow, concentrated in BFSI and CX, while healthcare, manufacturing and retail remain underdeveloped. Despite increased platform branding, a few providers have transformed accelerators into hardened, reusable deployment frameworks that sustain enterprise-grade performance.

Enterprises engaging this cohort are increasingly advocating for demonstrable reliability, cost efficiency and public case references. While orchestration is advancing incrementally, systemic gaps in evaluation, retraining and runtime optimization continue to limit scalability. The trajectory for 2025 suggests that midsize providers must industrialize their deployment practices, moving decisively from integration-led delivery toward standardized orchestration stacks and evaluation frameworks that treat GenAI as a stable operational backbone rather than an experimental capability. Those entities able to embed this discipline will define the next wave of competitiveness in the midsize market.

From the 111 companies assessed for this study, 32 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Apexon

Apexon builds GenAI delivery across text, table, graph, image and conversational UI modalities. From computer-aided design (CAD) drawing interpretation at Airbus to invoice analytics in manufacturing, its GenAI stack is fine-tuned for multi-input, context-heavy domains.

Ascendion

Ascendion's acquisitions (UX Reactor, Moody's and Nitro) reveal a forward strategy built on experience design, product-centric change and modernization excellence. Such acquisitions expand the company's capacity to support GenAI transformation beyond code delivery.

birlasoft

Birlasoft continues to expand Cogito's agent development environment with benchmark instrumentation, token-level telemetry and multiagent orchestration logic, supported by internal SLM fine-tuning pipelines and sandboxed delivery acceleration programs.

Brillio

Brillio has engineered its GenAI systems to interoperate with client-native environments such as AWS Bedrock, Snowflake and ServiceNow. This approach to deployment reflects vendor-agnosticism while aligning closely with the domain context.

EXL

EXL has enhanced its GenAI delivery architecture with new agent design patterns, updated prompt augmentation workflows, platform-based telemetry and an expanded agent orchestration framework integrated within its EXLerate.AI stack.

firstsource

Firstsource launched Agentic AI Studio with over 50 task models and LangGraph-ready orchestration, enabling modular workflows in claims, underwriting and service operations. Its HealthTech and ILM platforms include transformer-based classification, agent logs and gated routing.

HARMAN

HARMAN Digital Transformation Solutions enhanced its GenAI delivery by integrating prompt scoring pipelines, rollback-enabled orchestration and hallucination evaluation metrics within its LLMOps stack. Its Genesis framework expands into new agentic orchestration zones, memory and traceability.

HEXAWARE

Hexaware expanded its GenAI stack with AgentVerse platform upgrades, agentic evaluation tooling and telemetry-linked prompt orchestration. The updated architecture integrates modular agents, custom LLM routing and microservice-managed cost tracking.

Persistent

Persistent Systems has expanded GenAI Hub and SASVA with agent lifecycle controls, private LLM gateways and token-aware routing, while strengthening telemetry, budget segmentation and fallback orchestration as part of its composable deployment stack.

Trigent

Trigent's recent platform investments include enhancements to AI Studio's orchestration backend, modular agent recipe library, prompt evaluation tooling and integrations with OpenRouter, LangSmith and MLflow.

unisys

Unisys has extended its Service Experience Accelerator (SEA) with patented state transition logic, telemetry-aware orchestration and knowledge curation integration while enabling multilingual LLM workflows and prompt preprocessing for domain-specific tuning.

UST

UST has expanded its GenAI delivery stack with Smart Genie for agent orchestration, CodeCrafter for multimodal code conversion and Navigator AI for use case simulation, embedding memory-aware workflows and compliance-aware retrieval to make it enterprise-ready.

virtusa

Virtusa has extended its Helio platform with modular orchestration tools, prompt-layer compliance scaffolds and evaluation-first deployment workflows, supported by audit-friendly agent telemetry and flexible, client-configurable runtime integrations.

Coforge

Coforge's (Rising Star) Quasar platform enables low-code orchestration, agent registry usage and real-time prompt design with integrated trust controls. Multiagent delivery is productized into solution bundles with support for SaaS and on-premises deployments.

Unisys

Leader

"Unisys blends composable GenAI architecture, agentic orchestration and multilingual knowledge automation into a delivery framework built for enterprise scale, enabling trusted, real-time and telemetry-aware AI deployments."

Gowtham Kumar Sampath

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys' GenAI development capability is centered on a composable framework architecture that supports tenant-hosted deployment, prompt normalization and semantic orchestration. Its Service Experience Accelerator underpins this structure, enabling real-time data ingestion, agentic workflow transitions and embedded role-based intelligence across use cases, including multilingual bots, knowledge automation and telemetry-integrated workflows.

Strengths

Composable GenAI stack with semantic controls: Unisys delivers GenAI through its modular Service Experience Accelerator, which features trust-bound deployment models, preintegrated RAG and LLM prompt preprocessing. The platform supports semantic context modeling through ontology-based mapping and integrates real-time telemetry into prompt orchestration. This modularity allows Unisys to customize stack elements according to enterprise constraints, while supporting operational and IT service workflows.

Multilingual and context-aware orchestration: Unisys Service Experience Accelerator supports multilingual deployment across text and voice modalities, enabling clients in diverse regions to access consistent GenAI agent experiences. Also, Unisys links LLM outputs to contextual business events through direct integration with IT telemetry streams.

Knowledge lifecycle automation at scale: The embedded Knowledge Curation Engine automates article generation, ticket-topic correlation and response quality modeling. It improves chatbot resolution rates and provides curated content to live agents, ensuring consistent service delivery across human and digital support tiers. The framework uses NLP-based clustering and ticket history mapping to identify knowledge gaps, thereby improving organizational memory over time without requiring full reauthoring.

Caution

Unisys should provide SDKs or packaged orchestration pipelines to help technical teams scale use cases more easily.

While it offers macro-level visibility, adding prompt-specific dashboards and success/failure insights would improve feedback and tuning at a granular level.

Appendix

The ISG Provider Lens® 2025 – Generative AI Services 2025 — Global study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of September 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Generative AI Services — Global market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Author

Gowtham Kumar Sampath
Assistant Director and Principal Analyst

Gowtham Sampath is a Senior Manager with ISG Research, responsible for authoring ISG Provider Lens® quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices. In his role, he also works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries.

He is also authoring thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience as well as the impact of data analytics across different industry verticals.

Lead Author

Hemangi Patel
Senior Manager and Principal Analyst

Hemangi has more than 10 years of experience in the field of strategy research and consulting space, especially within ICT sector. She has proven her excellence in delivering projects that include quality analysis, extensive primary and secondary research, market entry and go-to-market strategy, competitive benchmarking and company analysis, and opportunity assessment. Here at ISG, Hemangi leads research activities for service provider intelligence report in the areas of BPO focused on customer experience and contact center services.

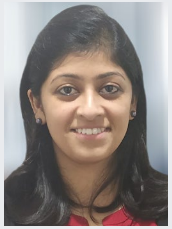
Hemangi holds her bachelor's degree in commerce from Mumbai University and MSc in economics from Symbiosis International University, Pune.

Research Analyst

Arjun Das V
Assistant Manager and Lead Research Specialist

Arjun Das is an Assistant Manager & Lead Research Specialist with ISG and is responsible for supporting and co-authoring Provider Lens® studies on Enterprise Service Management, ServiceNow Ecosystem, and Generative AI. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than ten years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Gen AI, and blockchain.



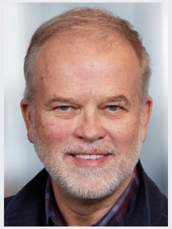
Study Sponsor

Namratha Darshan
Chief Business Leader

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence. As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services. She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical focused reports for insurance.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

OCTOBER, 2025

REPORT: GENERATIVE AI SERVICES — LARGE AND MIDSIZE