ISG Provider Lens®

Generative AI Services — Large and Midsize

Development and Deployment Services — Large

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

Customized report courtesy of:

DXC TECHNOLOGY

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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

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	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

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	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.

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.

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

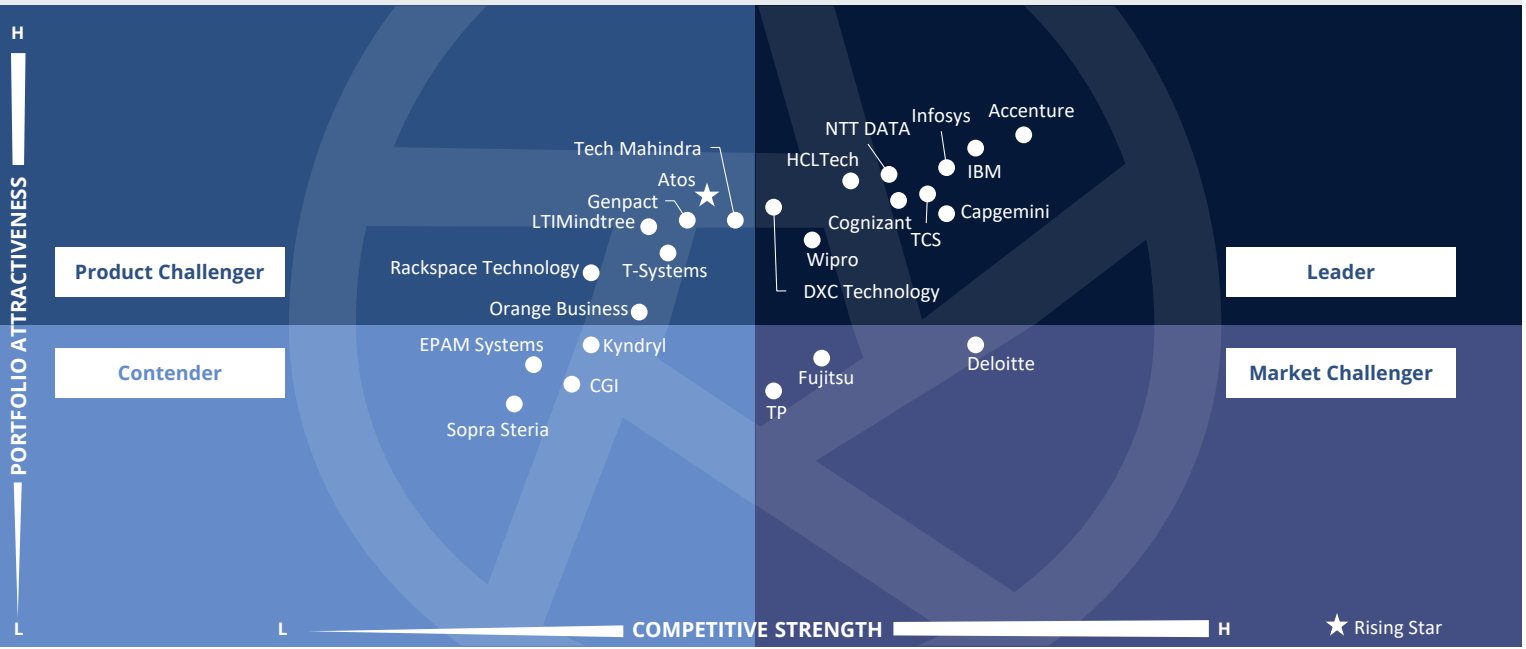
Should read this to identify providers that ensure seamless GenAI adoption, focusing on improving data integrity and scalability in their information systems. The report provides insights on how providers optimize system architecture to support GenAI solutions at scale. It also provides insights into 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 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 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 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 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 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 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 Foundry everywhere 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.

Leader

"DXC Technology delivers a governed and secure GenAI foundation through hybrid deployments, integrated platforms and Azure OpenAI-powered solutions, enabling enterprises to confidently accelerate AI adoption."

Hemangi Patel

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 120,000 employees across over 70 countries. In FY25, the company generated $12.8 billion in revenue, with Consulting and Engineering Services (CES) as its largest segment. DXC accelerates GenAI deployment through its AI Workbench, combining engineering and secure enterprise services for scalable integration. Its Private AI offering ensures data control and compliance via hybrid architectures. In partnership with Microsoft, DXC's GenAI Assistant In-a-Box enables rapid and secure deployment, offering enterprise-grade customization and adoption support.

Strengths

Focus on sovereign AI: DXC Technology's Private AI for the Enterprise framework allows organizations to maintain control over confidential data, platform and intellectual property. Built on the AI Impact framework, it supports secure on-premises, air-gapped and hybrid deployments with preconfigured enterprise architectures, security and self-healing automation. The company delivers governed, scalable and cost-efficient AI services.

GenAI deployment platform: DXC Technology's AI Workbench is a multi-orchestration agentic AI and GenAI platform combining consulting, engineering and secure enterprise services to accelerate AI adoption. It provides prebuilt, scalable solutions with governance and safeguards for secure deployment. The platform enhances safety, manages knowledge, analyzes competition and automates decision-making, and is integrated with systems such as Salesforce, ServiceNow and Microsoft Teams.

Partnership with Microsoft: DXC Technology's GenAI Assistant In-a-Box leverages Microsoft Azure OpenAI Service, enabling organizations to integrate AI into their operations. The solution includes ChatGPT-style capabilities and offers a secure environment setup, data engineering, prompt tuning, fine-tuning and UI development, alongside adoption support such as training, documentation and self-service tools. It enables rapid deployment across industries and augments workforce productivity.

Caution

The rapid GenAI deployment through DXC Technology's AI Workbench may lead to over-reliance on prebuilt solutions. Organizations should ensure proper change management and validate that governance mechanisms align with internal policies and regulatory requirements.

Appendix

Methodology & Team

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

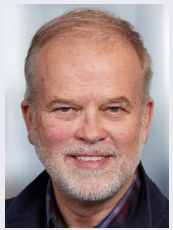
Namratha Darshan

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®

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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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REPORT: GENERATIVE AI SERVICES — LARGE AND MIDSIZE