ISG Provider Lens®

# Generative AI Services — Large and Midsize

## Strategy and Consulting 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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Executive Summary

*Report Author: Gowtham Kumar Sampath and Hemangi Patel*

**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



| | 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

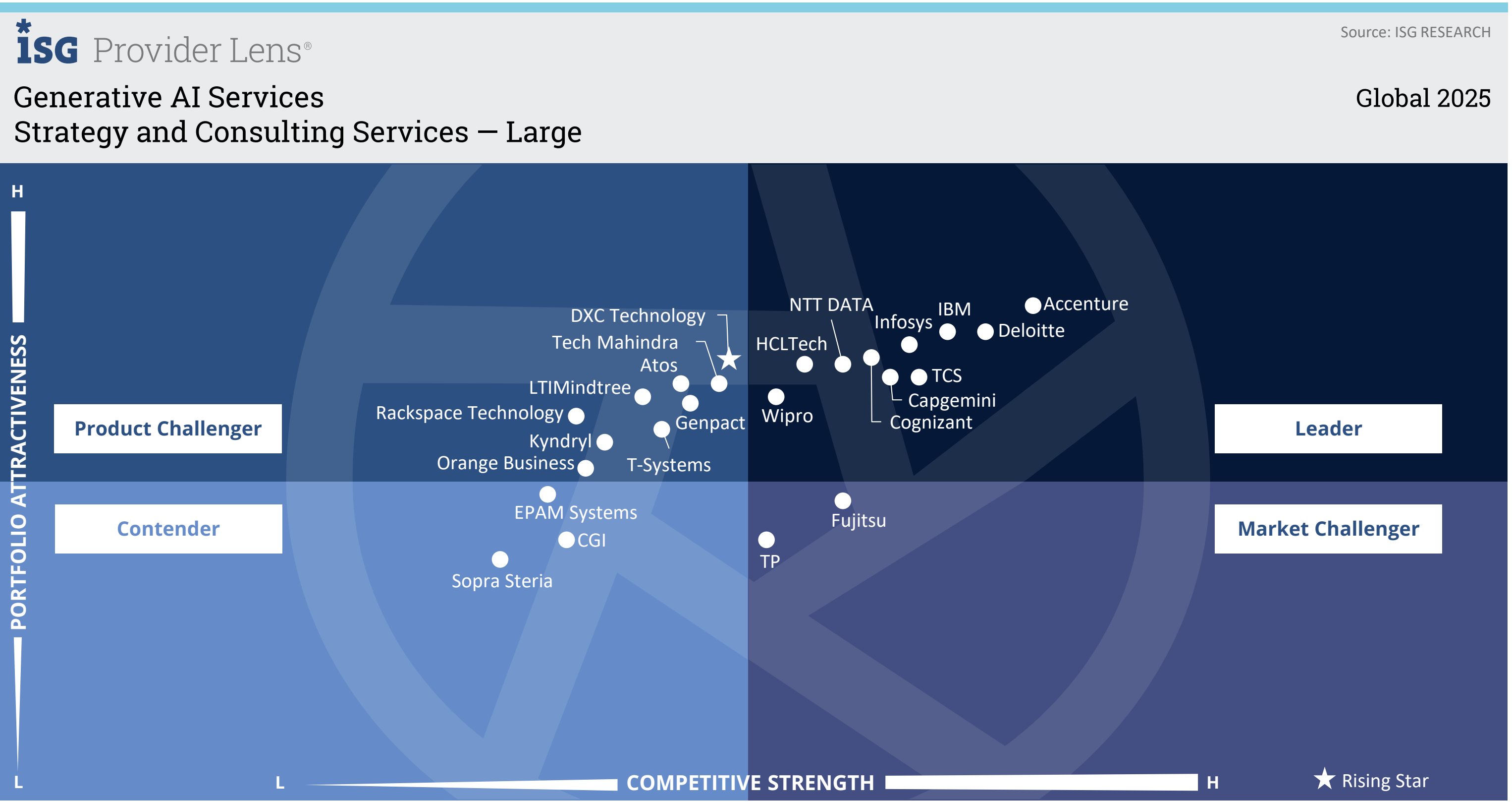
Should read this to identify providers that ensure seamless GenAI adoption, with a focus on improving data integrity and scalability in their information systems. It also provides insights on providers that embed risk mitigation and governance frameworks into GenAI deployments, ensuring alignment with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




**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

**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

**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

**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.

**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

**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

**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.

Rising Star

"DXC Technology empowers organizations to unlock the GenAI value through strategic prioritization, human-centric transformation and robust governance, ensuring that AI delivers real, scalable impact."

*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's GenAI approach prioritizes use cases, guiding clients from ideation to execution with tailored road maps and compliance checks. Its AI Engineering Services support change management and governance, ensuring secure, scalable and outcome-driven GenAI adoption.

## Strengths

**Use case prioritization:** DXC Technology helps organizations realize GenAI value through a discovery and co-innovation approach. The AI Discovery and Value Realization framework identifies high-impact opportunities and builds tailored road maps. It includes ideation, prototyping, compliance checks and maturity assessments. Copilot adoption is embedded into this journey, with DXC guiding clients in identifying where AI assistants can augment workflows and deliver measurable outcomes from concept to execution.

**Organizational change management:** DXC supports GenAI adoption through change management and AI Engineering Services. It addresses challenges such as resistance and trust via transparent communication and leadership engagement. The firm's Copilot Assistance Program provides hands-on coaching, awareness training and governance best practices to ensure successful integration of AI tools across roles and functions.

**Focus on governance:** DXC Technology provides strategic GenAI governance through advisory-led services and proprietary frameworks. Its AI Council, CoE and Code of Conduct offer structured oversight and policy guidance tailored to industry needs and GenAI maturity. The company helps clients align AI initiatives with business goals and regulations, supported by legislative advisory and compliance consulting. AI Engineering Services ensure responsible, scalable AI deployment.

## Caution

DXC Technology's use case prioritization approach is a clear differentiator, helping clients identify and shape high-impact GenAI opportunities. However, the approach should be more deeply tailored to specific industry contexts to unlock greater value, as reliance on generic frameworks may slow execution and delay tangible ROI.

# 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.

**Study Sponsor:**
Namratha Darshan

**Lead Authors:**
Gowtham Kumar Sampath and Hemangi Patel

**Editors:**
Radhika Venkatachalam and Ritu Sharma

**Research Analyst:**
Arjun Das V

**Data Analyst:**
Aishwarya Pateriya

**Consultant Advisors:**
Loren Absher, Olga Kupriyanova, and Ryan Hamze

**Project Managers:**
Sukanya Nair and Sibin Varghese

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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.

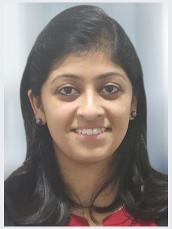
*Research Analyst*

## 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*

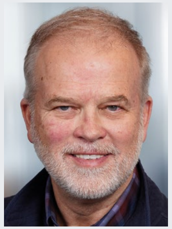


## Namratha Darshan
**Chief Business Leader**

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.

## ISG Research™

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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.

For more information, visit isg-one.com.

ISG Provider Lens®

**OCTOBER, 2025**

**REPORT: GENERATIVE AI SERVICES — LARGE AND MIDSIZE**