ISG Provider Lens™

Generative AI Services

A research report comparing provider strengths, challenges and competitive differentiators

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Executive Summary

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GenAI-led disruption is inevitable, but its success needs a thoughtful, data and human-centric strategy

The GenAI market is experiencing a transformative period of rapid growth, unlocking new possibilities for enterprises to innovate and streamline operations. From an enterprise standpoint, this growth signals a pressing need to invest in GenAI now to stay competitive. Businesses understand that the automation and efficiencies offered by AI can be leveraged to reduce operational costs, improve accuracy in tasks and drive new revenue streams through innovative products and services.

- *For enterprises, the focus is on identifying the right use cases that deliver clear RoI and align with long-term strategic goals such as enhancing CX or improving operational efficiency.*

- *For decision-makers, it is essential to invest in adaptable AI technologies that can evolve as a business grows, ensuring sustainability and relevance in the long term.*

- **The current state of the GenAI market — PoC to delivery**

In the past 12 months, the GenAI landscape has witnessed a significant surge in the number of projects — right from PoCs and minimum viable products (MVPs) to full-scale deployment pipelines. Enterprises across industries are increasingly exploring GenAI to handle complex challenges, enhance operational efficiencies and drive innovation. The initial PoC phase is critical for them to evaluate the potential of GenAI in solving specific business problems. PoCs allow organizations to assess the feasibility and practicality of GenAI applications before committing to substantial investments. They help organizations develop a functional version of the AI application that can be tested in real-world conditions. As an increasing number of enterprises experience the benefits of AI, the pipeline of GenAI projects will continue to grow,

GenAI is the **new frontier of innovation,** reshaping industries and redefining possibilities.

Average number of projects from PoC to delivery phase
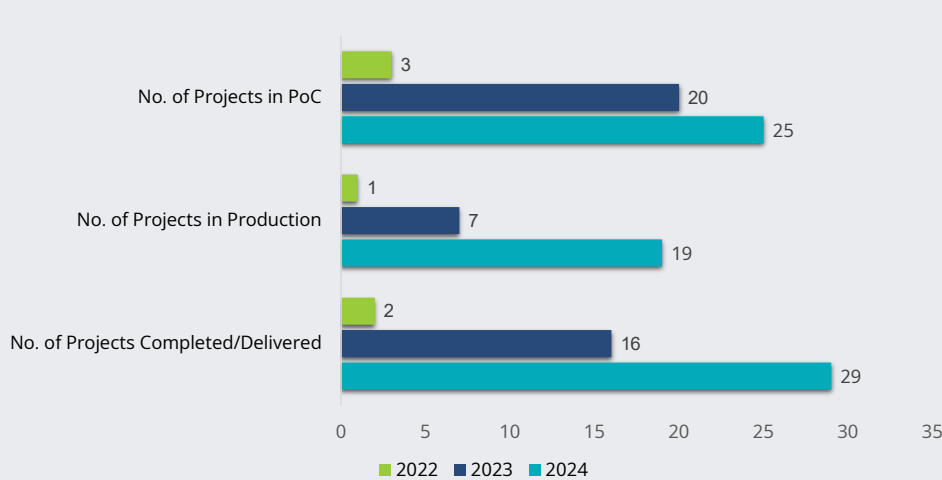
Note: This is an indicative representation based on RFI responses solicited for ISG Provider Lens™ GenAI Study

leading to a future where AI will be deeply embedded in business operations. The successful implementation of these projects will not only drive business outcomes but also shape the future of innovation across industries.

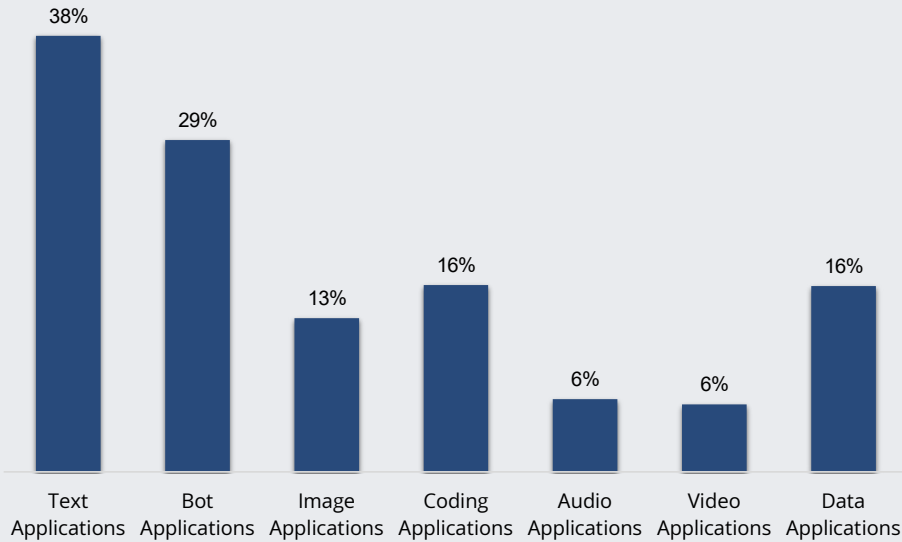- **Developments across modalities and applications**

The field of GenAI will progress rapidly both in terms of research and commercialization, but use cases are emerging rapidly in the enterprise landscape. Some of the recent GenAI applications have proven how this new-age technology can help with innovation and creativity, indicating usability for both businesses and individuals. While the current GenAI landscape is dominated by text-based and bot applications, there is a growing anticipation for other modalities — such as image, video, data and audio-based applications — to reach their full potential in the near future.

Text-based applications have seen the most rapid development in the field of GenAI, primarily due to their simple interface, rapid RoI and immense utility. Chatbots, in particular,

have become a ubiquitous tool across industries. Powered by large language models (LLMs) such as OpenAI's GPT, chatbots can provide personalized assistance, customer support and automated communication at an unprecedented scale. Companies use chatbots/copilots to enhance customer service, streamline business operations and facilitate conversation. For instance, GenAI-driven chatbots are revolutionizing customer service centers, enabling businesses to provide 24/7 support, instant issue resolution and multilingual capabilities — all while reducing human workload.

However, despite the significant growth in text-based AI, the full scope of GenAI's potential remains untapped as other modalities — such as image, audio, video, and data-based applications — are still evolving toward mainstream adoption. The full potential of multimodal GenAI is yet to be realized, but the ongoing advances in neural networks and deep learning indicate that the future is bright. As models become increasingly capable of handling diverse inputs — text, images, audio, video and data — applications will become

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On average, applications by modality moved from PoC to the production phase

Application	Percentage
Text Applications	38%
Bot Applications	29%
Image Applications	13%
Coding Applications	16%
Audio Applications	6%
Video Applications	6%
Data Applications	16%

Note: This is an indicative representation based on RFI responses solicited for ISG Provider Lens™ GenAI Study
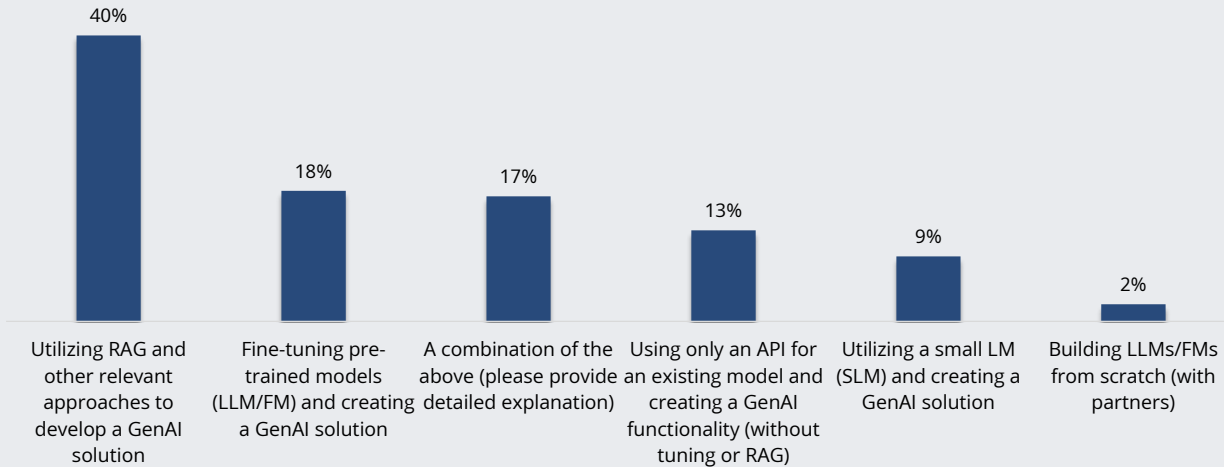
considerably integrated and sophisticated.

- **Model development using RAG versus fine - tune versus SLM and LLM**

The development of GenAI applications is undergoing a significant transformation, with IT service providers at the forefront of this change. While current methods such as retrieval-augmented generation (RAG) and fine-tuning LLMs have proven to be effective, the future points toward a more specialized approach. Fine-tuning LLMs will remain essential, but the focus will increasingly shift to the development of small, customized language models that cater to specific applications. As AI technologies mature, there is growing recognition that small, more customized language models — fine-tuned for specific applications — can provide significant advantages in terms of cost, scalability and performance. Small, domain-specific versions of LLMs can perform equally well in targeted tasks without requiring the massive infrastructure needed to train and deploy full-scale LLMs.

In the future, IT service providers are likely to adopt a hybrid approach, leveraging the strengths of each method, including fine-tuning, RAG approach, LLMs and small language models (SLMs). For instance, LLMs could be used for general tasks or applications that require broad linguistic capabilities, while SLMs could be deployed for more focused and specialized tasks. This hybrid strategy will offer a balance between scale, cost-efficiency and task-specific performance, enabling providers to offer GenAI solutions that are both powerful and practical.

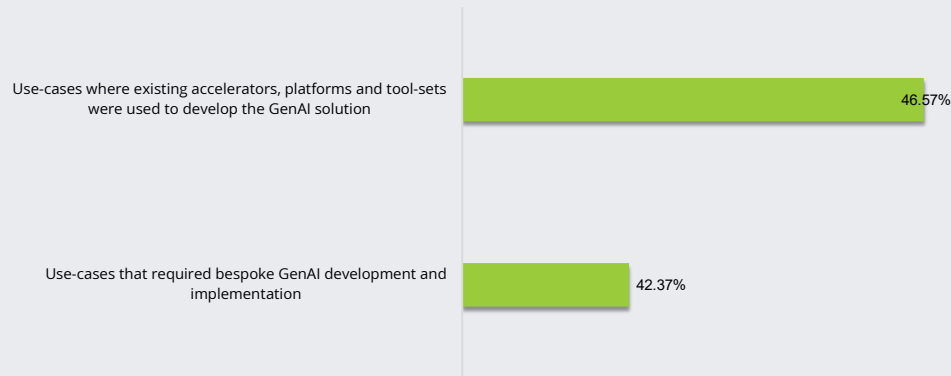**On aggregate, methods of deploying GenAI solutions in the production phase**

40%	Utilizing RAG and other relevant approaches to develop a GenAI solution
18%	Fine-tuning pre-trained models (LLM/FM) and creating a GenAI solution
17%	A combination of the above (please provide detailed explanation)
13%	Using only an API for an existing model and creating a GenAI functionality (without tuning or RAG)
9%	Utilizing a small LM (SLM) and creating a GenAI solution
2%	Building LLMs/FMs from scratch (with partners)

Note: This is an indicative representation based on RFI responses solicited for ISG Provider Lens™ GenAI Study

- **Implementation using bespoke versus existing accelerators**

GenAI has taken center stage in transforming industries by automating tasks, generating content and providing intelligent insights. While open-source GenAI models offer broad capabilities and accessibility, enterprises are increasingly gravitating toward bespoke approaches and customizations tailored to their unique needs. A bespoke approach to AI development entails creating customized GenAI models that are fine-tuned, secure and optimized for specific business use cases. This shift is driven by various factors such as the need for privacy and security, specialization of tasks, cost-efficiency requirements and the ability to integrate AI seamlessly into existing operations. While enterprises are focusing on customized GenAI models, they are not starting from scratch; many organizations are leveraging existing AI platforms, toolsets and accelerators to streamline the development process. These resources provide a foundation upon which bespoke GenAI solutions can be built, reducing development time and costs.

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An approximate indication of the number of projects moved to production through bespoke solutions or using existing accelerators, platforms and toolsets

Use-cases where existing accelerators, platforms and tool-sets were used to develop the GenAI solution — 46.57%

Use-cases that required bespoke GenAI development and implementation — 42.37%

Note: This is an indicative representation based on RFI responses solicited for ISG Provider Lens™ GenAI Study

While the technology outcomes from Gen AI are driving increased adoption, enterprises continue to face key challenges that must be addressed. Service providers play a crucial role in overcoming these barriers, enabling organizations to fully harness the potential of Gen AI. By addressing these hurdles, adoption can be accelerated, and the transformative benefits of the technology can be realized more broadly.

- **Enterprise challenges and provider recommendations**

As GenAI continues to reshape industries, enterprises are increasingly looking to leverage its capabilities to achieve innovation, operational efficiency and a competitive advantage. While the potential of GenAI is significant, the journey to adoption is fraught with challenges. From data privacy concerns to integration complexities, the road to realizing AI's full potential can be a difficult one. Enterprises face mounting challenges in assessing business needs, evaluating RoI, ensuring technology compatibility and prioritizing change management. By partnering with relevant service providers, enterprises can make informed decisions that maximize the impact of their AI initiatives, while addressing the following challenges.

1. Data strategy and governance challenges

To implement GenAI successfully, enterprises must have a well-defined data strategy and governance framework as AI systems rely heavily on high-quality, well-organized data to generate accurate predictions, insights and solutions. Enterprises that fail to establish strong data governance face issues such as data silos, poor data quality and compliance breaches — all of which can derail AI projects.

2. Data availability and accessibility

For GenAI models to function effectively, enterprises need to ensure that relevant data is accessible and available in sufficient volumes. AI thrives on large datasets, and enterprises must collect, store and organize data across various functions and systems to fuel AI initiatives. Several enterprises struggle with siloed data across different business units, which can deter AI adoption.

Provider contribution needed to mitigate the above challenges

- **Breaking down data silos:** Providers should offer solutions that enable seamless integration of data from multiple sources, including CRM systems, ERP platforms and IoT devices. GenAI solutions need access to real-time and historical data. Therefore, it is essential for enterprises to implement data architectures that promote sharing and accessibility across teams.

- **Building a unified data infrastructure:** Providers should support enterprises by recommending the adoption of unified data infrastructures such as data lakes or data warehouses to centralize data and ensure it is available for AI consumption. Cloud-based solutions often provide the flexibility and scalability needed for this purpose. By organizing data into a unified structure, enterprises can optimize AI performance and minimize delays in data processing.

3. Data quality management

The quality of the data fed into GenAI models directly impacts their performance.

Poor-quality data can lead to inaccurate insights, flawed predictions and biased outcomes. Enterprises need a robust data quality management strategy to ensure that the data used by GenAI models is accurate, complete and up to date. To this end, they need mechanisms for data cleansing and validation. Data bias is a significant risk when implementing AI systems. Biased data can lead to biased AI outcomes, which can have serious implications on decision-making, particularly in areas such as recruitment, financial functions and customer segmentation.

Provider intervention required to mitigate the above challenges

- **Ensuring data accuracy and completeness:** Providers should offer data cleansing and preprocessing tools that automatically detect and fix issues such as missing data, duplicate entries or inconsistencies. Additionally, AI systems can be integrated with real-time validation tools to continuously assess and improve data quality.

- **Managing data bias:** Providers should support enterprises by offering tools and frameworks to detect and mitigate bias in data, ensuring that GenAI models remain fair and inclusive.

By focusing on data quality management, enterprises can ensure that their GenAI models are delivering trustworthy and actionable insights.

4. Data privacy and security concerns

GenAI models require large datasets, which often include sensitive information, for training and deployment. For enterprises in regulated industries such as healthcare, finance and retail, protecting customer and business data, while complying with stringent regulations such as EU AI Act, GDPR, HIPAA, and CCPA is critical. Data protection should be at the core of the solution adopted, with encryption protocols for data storage, processing and transfer. Data breaches or incorrect handling can result in legal repercussions, hefty fines and damage to a company's reputation. Additionally, AI-driven systems must be designed to meet user privacy standards, especially when data is collected

and used for personalized outputs or decisions.

Provider arbitration needed to deal with the above challenges

- **Compliance-driven GenAI solutions:** Service providers should prioritize data privacy by ensuring their GenAI models are compliant with local and global regulations such as GDPR and EU AI Act in the European Union or HIPAA for healthcare data in the U.S. AI systems should be designed to respect consent and allow enterprises to manage data according to regulatory guidelines.

- **End-to-end encryption:** Providers should implement anonymization or tokenization methods to ensure that sensitive data cannot be misused even if unfairly accessed.

- **Secure cloud infrastructure:** AI systems deployed in cloud environments should leverage secure cloud services with strong identity and access management (IAM) tools, ensuring that only authorized users can access sensitive data. Providers should align with industry-standard security certifications such as ISO/IEC 27001 and SOC 2 to build trust with enterprises.

- **Explainable AI (XAI):** To address the concern of data misuse, providers should develop explainable GenAI solutions that offer transparency into how decisions are made. For example, financial institutions would benefit from AI systems that can explain why certain credit decisions were made based on customer data, reducing the risk of discriminatory practices.

5. Integration with existing systems and workflows

Several enterprises have complex, legacy IT infrastructures. Incorporating GenAI systems into these environments can be challenging due to compatibility issues, disruption to established workflows and the cost of overhauling existing technology stacks. As GenAI solutions often require input from multiple data sources, ensuring interoperability between different data formats and systems is critical. Without the right integration, enterprises risk failed AI implementations that do not deliver the desired value, causing inefficiencies.

Provider support to mitigate the above challenges

- **Customizable AI platforms:** Service providers should offer highly flexible, modular AI platforms that allow enterprises to tailor solutions to their existing environments, without the need for extensive system overhauls. This advantage would enable enterprises to plug GenAI solutions into their workflows, ensuring minimal disruption.
- **Comprehensive API integration:** Providers should build GenAI solutions with robust APIs and middleware support to integrate seamlessly with CRM, ERP, HR and other enterprise functions. This would enable data to flow smoothly between AI tools and legacy systems.
- **Consultative approach to integration:** Providers should offer integration support services to assist enterprises throughout the process. This support could include mapping existing workflows, identifying integration points and conducting phased rollouts to ensure that a GenAI system harmonizes with ongoing operations without disrupting day-to-day activities.

- **Data interoperability:** Providers should offer solutions that can standardize and harmonize data inputs, preventing data silos and improving overall system efficiency.

6. Lack of AI expertise and talent

The shortage of skilled AI professionals, such as data scientists, ML engineers and AI ethicists, makes it difficult for enterprises to build, deploy and maintain GenAI solutions internally. This talent gap can slow down AI adoption or lead to poorly managed implementations that fail to deliver value. Additionally, many business users and decision-makers lack the technical understanding of AI capabilities, limiting the organization's ability to capitalize on GenAI investments.

Provider intervention to address the above challenge

- **Training and education programs:** Providers should offer AI training and certification programs for non-technical employees and business leaders, thereby increasing AI literacy within an organization. Training should focus on

helping employees understand AI concepts, interpret AI-generated insights and make data-driven decisions.

- **Managed AI services:** To address talent shortage, providers should offer fully managed AI services, where they take responsibility for developing, deploying and maintaining GenAI models on behalf of enterprises. These services allow enterprises to benefit from AI without the need for in-house expertise.
- **AI-as-a-service platforms:** Providers should develop self-service AI platforms that abstract the technical complexities of model training and deployment. These platforms should be no-code/low-code, enabling users to interact with AI tools, customize models and run AI-driven processes without the need for deep technical knowledge.
- **Prebuilt GenAI models:** Providers should offer pretrained, industry-specific GenAI models that enterprises can deploy with minimal customization. For example, a financial services company might use a

pretrained fraud detection model, requiring only minor adjustments to suit its specific data and regulatory context.

7. High initial costs and unclear RoI

GenAI solutions often involve significant upfront investments in technology, infrastructure and talent. For enterprises, especially the ones with tight budgets, this can be a deterrent to AI adoption. Compounding this challenge is the uncertainty around RoI from AI projects. In many cases, enterprises struggle to quantify the long-term benefits or see the immediate value, leading to a reluctance to commit to large AI initiatives.

Provider arbitration to handle the above challenge

- **Flexible pricing models:** Providers should ease the cost burden by offering flexible pricing options such as pay-as-you-go, subscription models or usage-based pricing. Such options enable enterprises to scale their GenAI investments gradually, based on performance, rather than face prohibitive upfront costs.

- **PoC programs:** Providers should offer low-cost or risk-free PoC programs to allow enterprises to assess the feasibility of GenAI solutions in their real business environment. This would help enterprises evaluate RoI before making significant financial commitments.

- **RoI benchmarking and business case development:** Providers should help enterprises develop business cases for GenAI investments by offering clear benchmarks from previous deployments. RoI examples from similar industries and use cases can provide guidance and confidence to decision-makers considering GenAI investments.

- **Phased implementations:** Service providers should recommend phased or modular AI adoption approaches. This flexibility would allow enterprises to start small, with pilot projects, and gradually scale up AI initiatives as measurable benefits become evident, thereby managing financial risks.

8. Ethical and bias concerns

GenAI systems can unintentionally generate biased or unfair outputs, which can lead to ethical concerns, particularly in sectors such as recruitment, finance and healthcare. For example, GenAI models trained on biased data may perpetuate existing stereotypes, leading to discriminatory practices in hiring or lending decisions. Enterprises fear that deploying biased GenAI models can result in legal and credibility risks, especially with growing regulations around the ethical use of AI.

Provider arbitration needed to intercept the above challenge

- **Bias detection and mitigation:** Providers should build GenAI solutions with integrated bias detection tools that can analyze data for potential biases and ensure that the models' outputs are fair and equitable. Offering transparency in the way GenAI models are trained and continuously monitoring them for such biases is essential.

- **Fairness audits:** Providers should offer services such as fairness audits, where GenAI models are regularly tested for

fairness and adherence to ethical guidelines. Enterprises can receive reports on model behavior, ensuring that AI tools align with a company's values and compliance requirements.

- **Explainability and transparency:** Providers should develop AI systems that can explain their decision-making processes in ways that are easy to understand. This facility would allow enterprises to evaluate the fairness of AI outputs and identify any potential bias. Explainable AI is particularly valuable in regulated industries, where accountability is crucial.

- **Ethical AI frameworks:** Providers should offer GenAI solutions that are built around ethical AI principles, emphasizing fairness, transparency and accountability. For example, GenAI solutions could include built-in safeguards to prevent biased outputs and provide enterprises with the tools to audit and modify models over time.

Ensuring accountability: Providers should help enterprises with the creation of AI ethics committees and governance boards, ensuring that decisions around AI use are made with ethical considerations in mind.

9. Change management concerns

Adopting GenAI often leads to significant changes in the way an enterprise operates, making it essential to address organizational resistance and implement strong change management strategies. The adoption of AI can lead to concerns about job security, shifts in work responsibilities and apprehension about innovative technologies. Enterprises must manage these fears, while ensuring a smooth transition to AI-powered operations.

A primary concern among employees in the context of AI is the fear of job displacement, with the notion that AI will automate their tasks and make their roles redundant. Providers need to help enterprises frame AI as a tool for workforce augmentation rather than replacement. AI has the potential to automate repetitive, low-value tasks, freeing employees to focus on high-value, strategic work. It

is critical for enterprises to communicate this message clearly and frequently to their workforce. Employees are more likely to embrace AI when they understand the need for AI implementation and its alignment with business goals.

Provider support required to deal with the above challenge

- **Reframing AI as an enabler of productivity:** Providers should help enterprises position AI as a tool that enhances human capabilities rather than replace them. For example, AI can assist customer service agents by handling routine inquiries, allowing agents to focus on complex or high-touch interactions. This narrative helps employees understand that AI will improve their day-to-day work rather than eliminate their roles.

- **Highlighting job transformation examples:** Providers should support this messaging that AI can bring about job transformation by showcasing case studies where AI has done so without causing job losses. For instance, companies in sectors such as healthcare, finance or manufacturing might use AI to

reduce manual data entry efforts, enabling employees to focus on critical tasks such as decision-making, customer care or creative problem-solving.

Overcoming these challenges will enable organizations to unlock the full potential of Gen AI more effectively and at a faster pace. Service providers that have successfully addressed these issues are already setting new trends, which are expected to significantly shape the Gen AI landscape in 2025 and beyond.

Key trends impacting 2025

- GenAI is moving beyond text to embrace **multimodal AI models** that can process and generate outputs across various data types such as text, images, audio and video. This capability allows for more robust and sophisticated AI applications across industries.

- As the market matures, there is a growing demand for **domain-specific AI models** tailored to industries such as healthcare, finance, legal and manufacturing. These

models are trained on specialized datasets to meet the nuanced needs and regulatory requirements of each sector.

- The **democratization of AI** is a key trend, with no-code/low-code platforms allowing non-technical users to leverage GenAI. These platforms provide user-friendly interfaces for creating and deploying AI models, without the need for deep technical expertise, enabling widespread adoption across industries.

- GenAI models are being utilized to create **synthetic data;** this data is artificially generated based on real datasets to improve AI training, while addressing data scarcity and privacy concerns. Synthetic data can be used in place of sensitive, real-world data, ensuring improved data privacy while enhancing model accuracy.

- There is a rise in leveraging **agentic workflows,** where AI systems function as autonomous agents to handle complex tasks with minimal human intervention. These

agents can make decisions, execute tasks and learn from outcomes, making them ideal for automating intricate processes.

- With the proliferation of IoT devices, there is growing interest in running AI models on edge devices that operate in decentralized environments. To do this efficiently, **model compression** and **optimization** techniques such as **quantization**, **pruning** and **knowledge distillation** are utilized to reduce the size and computational requirements of GenAI models but without sacrificing performance.

- As GenAI models grow in complexity, there is an increasing focus on optimizing AI infrastructure to support **distributed training** and **inference** across multiple nodes and graphics processing units (GPUs). This allows enterprises to scale the development of massive AI models and reduce the time taken to train and deploy them.

- The complexity of managing AI workflows, from data preparation to model deployment and monitoring, has given rise to **AI orchestration platforms** and the adoption

of Large **Language Model Operations (LLMOps)** frameworks. These tools ensure that the entire life cycle of AI models — from development to production — is managed efficiently and sustainably.

Notes on quadrant positioning: The market has been segmented into Large, Midsize and Specialists to showcase the varying analytics requirements of enterprises based on their size, scale and industry dynamics. It also reflects providers' strategy to align their portfolio, industry verticals and offerings to suit market demands and enterprise needs.

Enterprises looking to harness the power of GenAI must first build a strong data strategy and invest in the right infrastructure to support AI workloads. Providers play a crucial role in helping enterprises manage data quality and in creating AI-ready infrastructure. By doing so, they can help enterprises fully realize the value of their AI investments and position themselves as leaders in the AI-driven economy.

Provider Positioning

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	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
66degrees	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Accenture	Leader	Not In	Not In	Leader	Not In	Not In
Accion Labs	Not In	Contender	Not In	Not In	Contender	Not In
Alexander Thamm	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
All for One Group	Not In	Contender	Not In	Not In	Contender	Not In
Analytics8	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Ancoris	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Apexon	Not In	Leader	Not In	Not In	Leader	Not In
Ascendion	Not In	Leader	Not In	Not In	Leader	Not In
Birlasoft	Not In	Leader	Not In	Not In	Leader	Not In

Provider Positioning

	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
Brillio	Not In	Leader	Not In	Not In	Leader	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Coforge	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In
Course5i	Not In	Not In	Contender	Not In	Not In	Contender
Cyient	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Deloitte	Leader	Not In	Not In	Market Challenger	Not In	Not In
DXC Technology	Leader	Not In	Not In	Leader	Not In	Not In
Encora	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In

Provider Positioning

	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
EPAM Systems	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
EXL	Not In	Leader	Not In	Not In	Leader	Not In
Factspan	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Fractal	Not In	Not In	Leader	Not In	Not In	Leader
Fujitsu	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Genpact	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
GFT	Not In	Contender	Not In	Not In	Contender	Not In
GlobalLogic	Not In	Leader	Not In	Not In	Leader	Not In
Happiest Minds	Not In	Contender	Not In	Not In	Contender	Not In
HARMAN	Not In	Leader	Not In	Not In	Leader	Not In

Provider Positioning

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	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
HCLTech	Rising Star ★	Not In	Not In	Leader	Not In	Not In
Hexaware	Not In	Leader	Not In	Not In	Leader	Not In
HTC Global Services	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In
IBM	Leader	Not In	Not In	Leader	Not In	Not In
Impetus Technologies	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
InData Labs	Not In	Not In	Contender	Not In	Not In	Contender
Indium Software	Not In	Contender	Not In	Not In	Contender	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Not In
InfoVision	Not In	Contender	Not In	Not In	Contender	Not In
Innover Digital	Not In	Not In	Contender	Not In	Not In	Contender

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ITC Infotech	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Kyndryl	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Leeway Hertz	Not In	Not In	Leader	Not In	Not In	Leader
LTIMindtree	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Mastek	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Mathco	Not In	Not In	Leader	Not In	Not In	Leader
Movate	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Mphasis	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Navikenz	Not In	Not In	Contender	Not In	Not In	Product Challenger
Network Science	Not In	Not In	Leader	Not In	Not In	Leader

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N-iX	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
NTT DATA	Leader	Not In	Not In	Leader	Not In	Not In
Orange Business	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Orion Innovation	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Persistent Systems	Not In	Leader	Not In	Not In	Leader	Not In
Quantiphi	Not In	Not In	Leader	Not In	Not In	Leader
Rackspace Technology	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Randstad Digital	Contender	Not In	Not In	Not In	Not In	Not In
Sagility	Not In	Not In	Leader	Not In	Not In	Leader
SG Analytics	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger

Provider Positioning

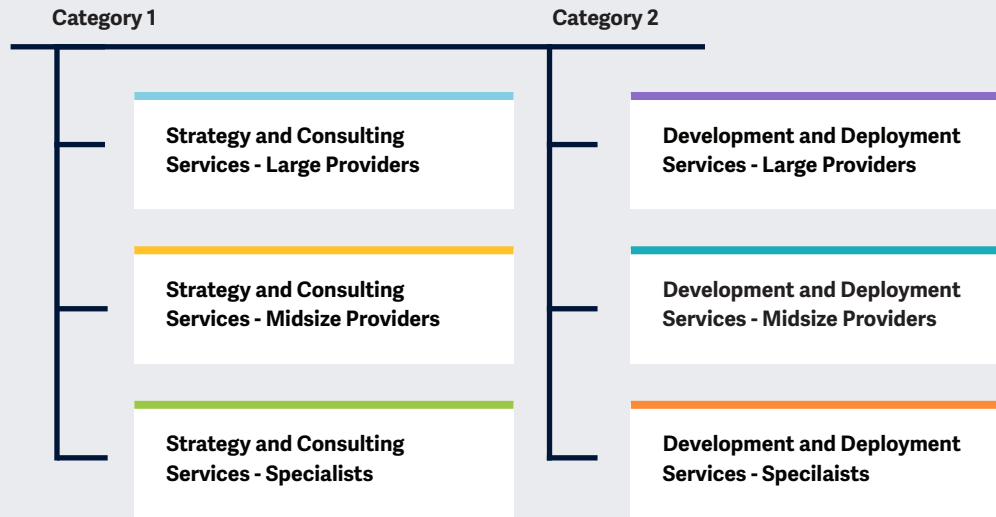|	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
Sigmoid	Not In	Not In	Rising Star ★	Not In	Not In	Rising Star ★
SLK Software	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Sopra Steria	Contender	Not In	Not In	Contender	Not In	Not In
Stefanini	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
TCS	Leader	Not In	Not In	Leader	Not In	Not In
Tech Mahindra	Product Challenger	Not In	Not In	Rising Star ★	Not In	Not In
Tietoevry	Contender	Not In	Not In	Contender	Not In	Not In
Tiger Analytics	Not In	Not In	Leader	Not In	Not In	Leader
Tredence	Not In	Not In	Leader	Not In	Not In	Leader
Trianz	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In

Provider Positioning

	Strategy and Consulting Services - Large Providers	Strategy and Consulting Services - Midsize Providers	Strategy and Consulting Services - Specialists	Development and Deployment Services - Large Providers	Development and Deployment Services - Midsize Providers	Development and Deployment Services - Specialists
Trigent	Not In	Not In	Not In	Not In	Leader	Not In
T-Systems	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Unisys	Not In	Leader	Not In	Not In	Leader	Not In
UST	Not In	Leader	Not In	Not In	Leader	Not In
Version 1	Not In	Not In	Leader	Not In	Not In	Leader
Virtusa	Not In	Leader	Not In	Not In	Leader	Not In
Wipro	Leader	Not In	Not In	Leader	Not In	Not In
WNS Analytics	Not In	Not In	Leader	Not In	Not In	Leader
Xoriant	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In

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

Simplified Illustration Source: ISG 2024

Category 1

| Strategy and Consulting Services - Large Providers |
| Strategy and Consulting Services - Midsize Providers |
| Strategy and Consulting Services - Specialists |

Category 2

| Development and Deployment Services - Large Providers |
| Development and Deployment Services - Midsize Providers |
| Development and Deployment Services - Specilaists |

Definition

Generative AI (GenAI), a rapidly evolving field of AI, is characterized by its ability to create entirely new content — from realistic images and videos to compelling text formats or even musical pieces. It stands out as a transformative technology with the potential to disrupt industries and revolutionize and redefine businesses by democratizing creativity, automating tasks and accelerating innovation, thus building interest among businesses and technology providers alike.

ISG identifies the following features of GenAI to encourage investments:

- Represents unprecedented creativity to handle content (marketing copy, images or videos), enterprise solutions (code generation or software development) and new products or materials invention (drug discovery), and personalizes experiences (recommendations or service interactions), reduces the time for tasks and enhances customer engagement.

- Analyzes large volumes of data to reveal hidden patterns, predicts market trends and optimizes product offerings, enhancing decision-making.
- Automates repetitive tasks (data entry or report generation), improves quality checks (software testing) and accelerates product development cycles, enabling businesses to rapidly introduce innovations in the market.
- Empowers businesses to personalize experiences, innovate rapidly, and identify/create new revenue streams.

While GenAI represents exciting possibilities, it is yet in the nascent stage and warrants a comprehensive understanding of its capabilities and limitations. Additionally, awareness of the competitive landscape and strategic consulting with providers that have the experience to develop, deploy and productionize GenAI solutions from use cases are crucial.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services: Strategy and Consulting Services - Large Providers, Strategy and Consulting Services-Midsize providers , Strategy and Consulting Services-Specialists, Development and Deployment Services - Large Providers , Development and Deployment Services - Midsize Providers, Development and Deployment Services - Specialists.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on Global market

This ISG Provider Lens™ study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

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:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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.

★ **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.

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 a 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.

Strategy and Consulting Services - Large Providers

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating large providers offering generative AI strategy and consulting services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each large providers addresses critical challenges faced globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Large service providers deliver comprehensive AI strategies, crafting holistic roadmaps that align generative AI adoption with broader corporate goals. With multi-vertical expertise, they offer advisory services to tackle cross-industry challenges, ensure regulatory compliance, and drive scalability. Their size enables them to manage large-scale change management programs, facilitating cultural shifts and smoother transitions toward AI adoption across enterprises.

Enterprises are looking for support from large services providers that help them identify, evaluate and help in quick conversion of projects in PoC to production in journey of adopting generative AI technology. They are relying on service provider's deep domain knowledge and subject matter expertise to help them identify use cases with high return on investment and gain high business outcomes, ensuring rapid deployment and integration.

Service providers are also focusing on setting up CoEs for enterprise clients to centralize AI efforts, promote innovation, and enforce best practices. This is also for broader AI adoption and ensuring initiatives align with business objectives.

Chief Information and Compliance Officers should use this to discover providers that ensure seamless generative AI adoption, focusing on improving data integrity and scalability within their company's information systems.

Chief Data and AI Officers should use this to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for leveraging data in generative AI solutions.
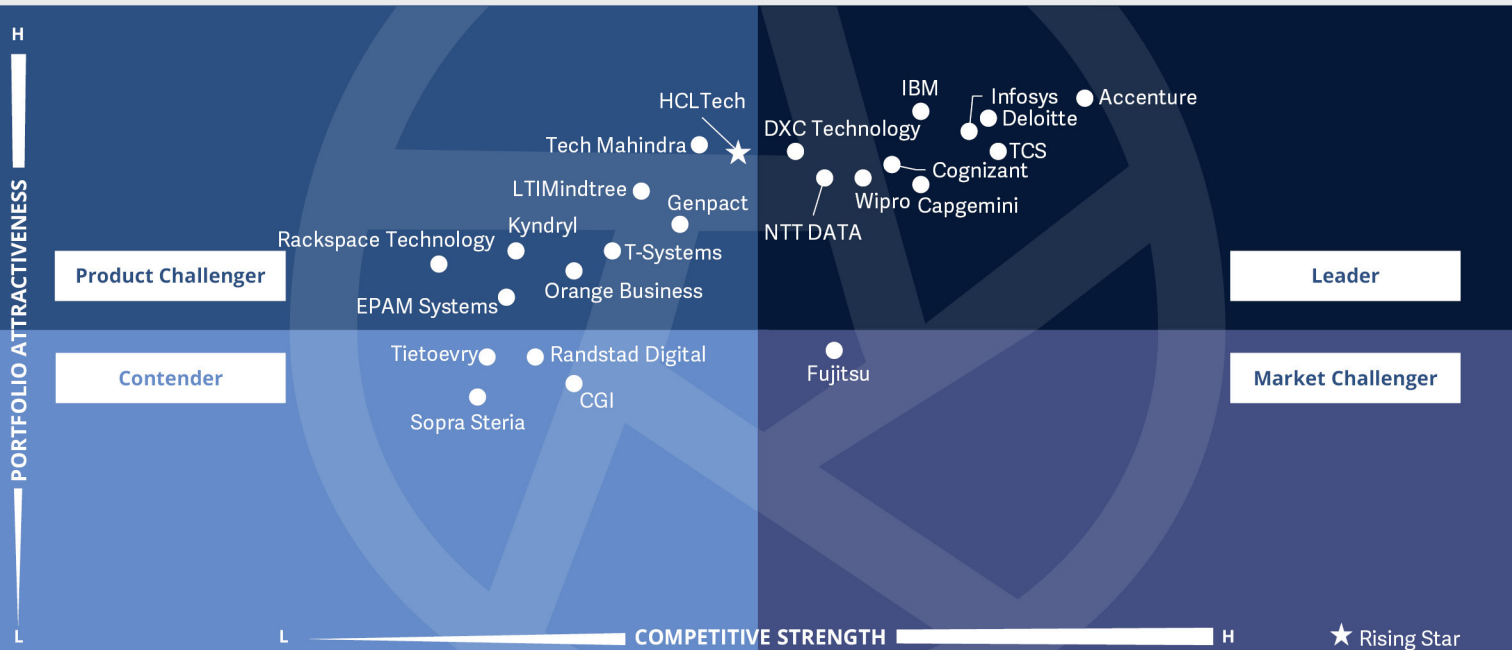
LoB managers should use this for improving customer experiences, drive innovation, and maintain a competitive edge in their respective markets, using generative AI.

ISG Provider Lens™

Generative AI Services
Strategy and Consulting Services - Large Providers

Global 2024

Source: ISG RESEARCH

PORTFOLIO ATTRACTIVENESS (H / L)

COMPETITIVE STRENGTH (L → H)

Quadrant plot points:

- HCLTech
- Tech Mahindra
- LTIMindtree
- Genpact
- Rackspace Technology
- Kyndryl
- T-Systems
- EPAM Systems
- Orange Business
- Tietoevry
- Randstad Digital
- Sopra Steria
- CGI
- DXC Technology
- IBM
- Infosys
- Deloitte
- Accenture
- TCS
- Cognizant
- Wipro
- Capgemini
- NTT DATA
- Fujitsu

Product Challenger
Contender
Leader
Market Challenger

★ Rising Star

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Strategy and Consulting Services - Large Providers

Definition

In this quadrant, ISG evaluates providers offering strategy and consulting services to help enterprises succeed with their GenAI initiatives. While the technology lends itself to the development of powerful tools and holds immense potential to transform various aspects of an enterprise's operations, its intricacies are becoming significant market entry barriers.

ISG believes that strategy and consulting services for GenAI will become invaluable, equipping business leaders with the knowledge and tools needed to make investments and informed decisions.

Strategic services assess use cases to identify the ones with the highest RoI potential and business value, aligning them with an enterprise's goals, data landscape and potential applications of GenAI. Consultants bring in-depth expertise in evaluating large language models (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 are expected to offer strategic guidance on developing training programs, establishing clear communication channels, fostering a GenAI culture and incorporating new advancements and best practices in alignment with evolving needs and industry standards.

By partnering with a qualified service provider — offering strategy, consulting and advisory services — enterprises can unlock the full potential of GenAI and gain a significant competitive edge.

Eligibility Criteria

1. Demonstrate **domain-specific experience** to deploy **tailored offerings** to businesses

2. Provide references for **use cases and PoC** implementations with ideation and approach details

3. **Proven knowledge of LLMs, cloud platforms, data science** and best practices for **model training, deployment and integration**

4. Have a **team** with **business and industry acumen**

5. Have **partnerships** with technology providers, academia and startup ecosystems

6. Invest in the **intellectual property** of **accelerators, tools, frameworks** and platforms

7. **Develop and implement ethical frameworks for responsible AI** use, prioritizing data quality, **fairness, transparency and accountability and mitigating bias and hallucination**

8. Facilitate **human-in-the-loop strategies** and ethical standards

9. **Guide enterprises** and internal teams through GenAI adoption with **effective communication, training and ongoing support**

Observations

Generative AI (GenAI) is set to transform business operations, while opening new avenues for innovation and productivity. Although GenAI represents significant potential, its benefits can remain unrealized without a strategic approach. Large size GenAI service providers are building strategy and consulting capabilities and developing robust frameworks and road maps to help enterprises accelerate their GenAI adoption journey. These frameworks enable businesses to identify the areas in which GenAI can deliver the most value and consequently optimize investments to achieve maximum RoI.

Successful implementation of GenAI also requires the adaptation of people and processes. Service providers help in managing organizational change and facilitating training to ensure a seamless transition. They assist enterprises by assessing their existing technical infrastructure, data quality and employee skills and identifying areas of improvement. Investing in training and upskilling employees in GenAI is essential for fostering a culture of innovation,

enabling enterprises to integrate new tools and methodologies effectively. In addition, strong data governance frameworks are necessary to maintain data quality and ensure compliance and security, which are critical for the successful operations of GenAI systems. IT service providers are also supporting enterprises in developing ethical AI frameworks and policies. This not only promotes responsible AI use but also helps organizations remain competitive by leveraging GenAI for innovation and operational efficiency.

From the 79 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture's strong position in this quadrant is largely due to its comprehensive strategy and consulting portfolio, along with its ability to offer end-to-end frameworks that empower businesses to adopt and scale faster in their transformation journey.

Capgemini

Capgemini's comprehensive GenAI offerings and its capabilities, spanning adoption strategies and frameworks and a focus on innovative technologies, are the key factors determining its strong position in this quadrant.

cognizant

Cognizant's consulting portfolio, which spans strategy to governance, is bolstered by frameworks and accelerators for successful Gen AI adoption, together with its Bluebolt program that uses AI and automation to optimize IT operations, reinforcing Cognizant's market position.

Deloitte.

Deloitte's strong position in the quadrant is attributed to its ability to showcase compelling GenAI use cases, its comprehensive portfolio featuring innovative frameworks and its workshop experience, which facilitates effective use case identification and adoption.

DXC TECHNOLOGY

DXC Technologies' ability to offer strategic frameworks for GenAI adoption and tailored industry-specific solutions, addressing sector-specific challenges, is a key aspect of its leadership position in this quadrant.

IBM.

IBM's extensive industry and domain expertise, commitment to innovation and strategic partnerships have significantly enhanced its competitiveness, enabling it to secure a leadership position in this quadrant.

Infosys

Infosys offers a comprehensive suite of GenAI strategy and consulting services, empowering clients to harness AI for business transformation by enabling the design, development and deployment of AI-driven solutions that revolutionize customer interactions.

Strategy and Consulting Services - Large Providers

NTT DATA

NTT DATA's key strengths lie in driving organizational transformation through strategic consulting and technology transformation, wherein it assesses current tech stacks and offers industry-specific solutions to bring about business transformation.

TATA CONSULTANCY SERVICES

TCS drives AI adoption among enterprises through its AI-driven strategy and consulting services, innovation initiatives and focused talent development programs, making it a Leader in this quadrant.

Wipro

Wipro's strategic acquisitions to enhance its strategy and consulting capabilities, strong emphasis on innovation and recent investments in developing GenAI capabilities are key factors contributing to its prominent position in the quadrant.

HCLTech

HCLTech's capacity to drive transformation through GenAI workshops and PoCs via AI Labs is noteworthy, wherein it places strong emphasis on skill building and learning through the AI Academy. These are key factors behind its Rising Star position in the quadrant.

Strategy and Consulting Services - Midsize Providers

Strategy and Consulting Services - Midsize Providers

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating mid-sized providers offering generative AI strategy and consulting services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each mid-sized provider addresses critical challenges faced globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Mid-size service providers excel in industry-specific expertise, focusing on a few verticals such as healthcare, retail, and manufacturing, where they develop deep knowledge of industry challenges and regulations. Their agility in solution design allows them to quickly adapt and offer flexible, tailored advisory services. With less bureaucracy, they provide faster engagement, helping enterprises move from strategy to action with quicker time-to-insight.

Enterprises seek expert guidance from mid-sized service providers to develop a comprehensive generative AI strategy. Key needs include data collection, integration, and cleaning processes, along with insights into selecting the right generative AI models. Consulting support helps enterprises align generative AI initiatives with long-term objectives, ensuring regulatory compliance, risk management, and efficient resource allocation. By leveraging NLP and image processing capabilities, service providers can enable enterprises to build actionable generative AI roadmaps that foster innovation, operational efficiency, and competitive advantage.

Chief Information and Compliance Officers should use this to discover providers that ensure seamless generative AI adoption, focusing on improving data integrity and scalability within their company's information systems.

Chief Data and AI Officers should use this to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for leveraging data in generative AI solutions.
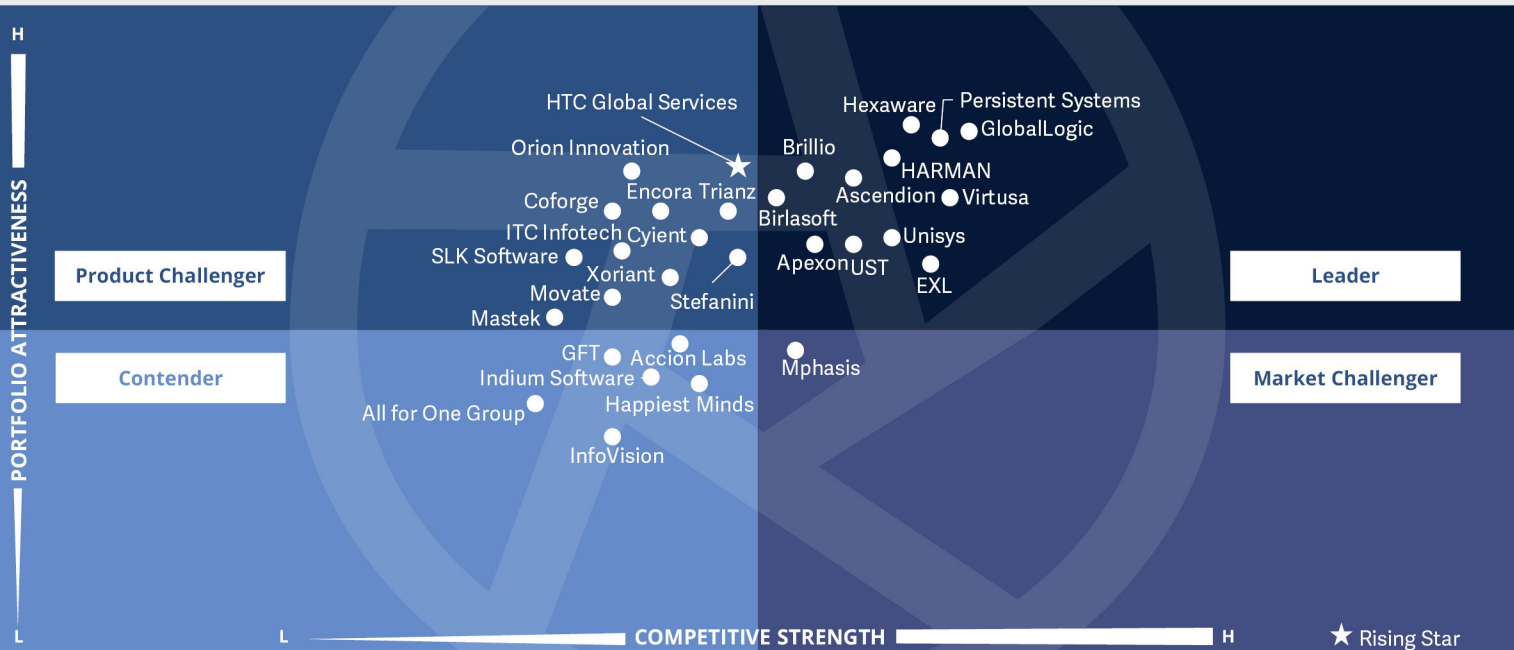
LoB managers should use this for improving customer experiences, drive innovation, and maintain a competitive edge in their respective markets, using generative AI.

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Definition

In this quadrant, ISG evaluates providers offering strategy and consulting services to help enterprises succeed with their GenAI initiatives. While the technology lends itself to the development of powerful tools and holds immense potential to transform various aspects of an enterprise's operations, its intricacies are becoming significant market entry barriers.

ISG believes that strategy and consulting services for GenAI will become invaluable, equipping business leaders with the knowledge and tools needed to make investments and informed decisions.

Strategic services assess use cases to identify the ones with the highest RoI potential and business value, aligning them with an enterprise's goals, data landscape and potential applications of GenAI. Consultants bring in-depth expertise in evaluating large language models (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 are expected to offer strategic guidance on developing training programs, establishing clear communication channels, fostering a GenAI culture and incorporating new advancements and best practices in alignment with evolving needs and industry standards.

By partnering with a qualified service provider — offering strategy, consulting and advisory services — enterprises can unlock the full potential of GenAI and gain a significant competitive edge.

Eligibility Criteria

1. Demonstrate **domain-specific experience** to deploy **tailored offerings** to businesses

2. Provide references for **use cases and PoC** implementations with ideation and approach details

3. **Proven knowledge of LLMs, cloud platforms, data science** and best practices for **model training, deployment and integration**

4. Have a **team** with **business and industry acumen**

5. Have **partnerships** with technology providers, academia and startup ecosystems

6. Invest in the **intellectual property** of **accelerators, tools, frameworks** and platforms

7. **Develop and implement ethical frameworks for responsible AI** use, prioritizing data quality, **fairness, transparency and accountability and mitigating bias and hallucination**

8. Facilitate **human-in-the-loop strategies** and ethical standards

9. Guide enterprises and internal teams through GenAI adoption with **effective communication, training and ongoing support**

Observations

Midsize providers are successfully differentiating themselves in the GenAI consulting and strategy space by leveraging their unique capabilities, industry expertise and strategic partnerships. Several providers offer extensive consulting frameworks that encompass various aspects of enterprise transformation and integrate technology, operations and governance to deliver holistic solutions.

These providers are focusing on specific verticals such as healthcare and retail, offering tailored solutions that resonate with the unique challenges of these industries. Their in-depth industry expertise enables them to deliver impactful consulting services. Midsize providers are also agile in adapting to client needs and rapidly implementing solutions. This agility allows them to design bespoke advisory services and implement feedback more effectively, as well as adapt their strategies to better align with client expectations, especially for the ones seeking quick implementations in competitive and fast-paced markets.

Many midsize providers are establishing CoEs dedicated to AI research and innovation. Their structured environment allows for experimentation with cutting-edge GenAI solutions, fostering a culture of continuous improvement. Providers are fostering collaborations and delivering industry-specific innovations, which not only enhance their consulting offerings but also position them as key players in the digital transformation journey of enterprises.

As the GenAI landscape continues to evolve, midsize providers with the ability to adapt and innovate will gain more traction and sustain a competitive advantage in this dynamic market.

From the 79 companies assessed for this study, 31 qualified for   this quadrant, with 12 being Leaders and one Rising Star.

Apexon

Apexon is actively investing in an AI CoE, dedicated to research and innovation and a structured environment for startups to experiment, develop and refine their GenAI solutions with investments focused on cutting-edge AI tools, infrastructure and talent acquisition.

ASCENDION

Ascendion launched a state-of-the-art GenAI Studio in India, with an engineering workspace that will amplify impact on clients and drive growth. The interactive space allows clients to explore GenAI solutions first-hand, fostering creativity, learning and collaboration.

birlasoft

Birlasoft launched its Cogito Generative AI platform showcasing its commitment to driving innovation and business optimization, delivering tailored accelerators that guide enterprises through every stage of their GenAI journey — from exploration to full-scale implementation.

Brillio

Brillio's collaboration with Microsoft on Azure OpenAI Service creates a strategic integration of cutting-edge AI with its proprietary and pre-build solutions to provide comprehensive services across assessment, advisory, governance, risk and compliance.

EXL

EXL's collaboration with NVIDIA will help develop AI-driven solutions for industries such as insurance, healthcare and banking, with a focus on refining large language models (LLMs) and creating GenAI-driven insights engines and smart agent assist solutions.

GlobalLogic

GlobalLogic is establishing the Hitachi Google Cloud Business Unit and the Google Cloud CoE to rapidly scale Google Cloud offerings and solutions   to new and existing enterprise customers, addressing industry challenges and utilizing Gemini models such as Vertex AI.

HARMAN launched ForecastGPT, a predictive analytics platform designed to deliver precise forecasts across diverse business metrics. Utilizing advanced GenAI, it offers deep insights and reasoning behind data trends, enhancing decision-making in unpredictable markets.

Hexaware partners with upGrad Enterprise to upskill over 100 employees in advanced GenAI concepts, equipping them with the expertise to develop innovative solutions and address complex business challenges and stay apace with cutting edge technological innovations.

Persistent Systems, in collaboration with Microsoft, launched a GenAI-powered Population Health Management (PHM) solution that offers high accuracy, scalability and compliance, improving patient outcomes through intelligent care recommendations.

Unisys provides advisory services and delivers tailored AI strategies that guide businesses through the adoption of GenAI and encompassing governance, risk management and ethical AI deployment with emphasis on aligning AI solutions with enterprise goals.

UST launched its UST Retail GenAI platform, designed to transform retail by integrating GenAI capabilities with established business models, allowing retailers to rapidly experiment and pilot GenAI-driven solutions and enhance operational efficiency.

Virtusa launched Helio, a suite of platforms, accelerators and consulting services designed to empower organizations to effectively leverage GenAI for their digital transformation initiatives by automating tasks, generating insights and fostering creativity.

HTC Global Services (Rising Star) emphasizes a collaborative approach with its consulting capabilities to help guide enterprises through the complexities of AI adoption, ensuring alignment with business objectives and fostering a culture of data-driven decision-making.

Unisys

"Unisys excels in delivering a comprehensive and cutting-edge suite of GenAI solutions, from AI consulting and application development to advanced data analytics and cybersecurity, positioning it as a versatile and trusted partner."

Gowtham Sampath, Hemangi Patel and Arjun Das

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys aims to leverage cutting-edge AI solutions to empower its clients to unlock enhanced levels of productivity, creativity and innovation. Its strategy and consulting portfolio is designed to help organizations navigate the complexities of GenAI adoption, providing specific assessments and solutions to mitigate risks and unlock the full potential of AI responsibly and ethically across a comprehensive suite of services and use-cases.

Strengths

Comprehensive and innovative offerings: Unisys' services cover diverse needs, including content generation, MLOps/ LLMOps, virtual assistants and creative tools. This breadth gives it the strong capability to cater to various industry requirements and use cases, demonstrating its adaptability and ability to innovate in integrating the latest advances in AI, including large language models (LLMs) and multimodal AI.

Focus on responsible AI and collaboration: Unisys' commitment to ethical AI practices and transparency is crucial in an era of increasing scrutiny of AI systems. Its collaboration with clients, academic institutions and industry partners reflects a robust approach to staying at the forefront of AI development, while ensuring its solutions align with societal values. This approach helps to assure clients concerned about ethical considerations and societal impact.

Broad spectrum of services and solutions: Unisys offers a wide array of services, including AI consulting, application development, data transformation and AI operations. Its capabilities in managing AI model life cycles, enhancing cybersecurity, optimizing logistics and providing smart AI assistants demonstrate its versatile and robust portfolio. This range indicates its ability to address complex business challenges and drive transformation across various sectors.

Caution

Despite its extensive range of AI services and commitment to agility, Unisys may face challenges in maintaining integration consistency and service quality across its broad portfolio, together with difficulties in managing the risks associated with rapid technological changes.

Strategy and Consulting Services - Specialists

Strategy and Consulting Services - Specialists

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating specialist providers offering generative AI strategy and consulting services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each specialist providers addresses critical challenges globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Specialist providers take a problem-solving approach by closely collaborating with clients to identify the root causes of business challenges, offering actionable insights that are highly relevant. Their hands-on experience in specific verticals equips them with deep knowledge of industry nuances, regulations, and pain points. This expertise enables them to deliver bespoke solutions, providing tailored strategies and innovative approaches that directly enhance business performance.

Enterprises are increasingly focused on implementing responsible AI to ensure the ethical, transparent, and fair use of AI technologies. Service providers are expected to consider these principles in their strategic solutions, ensuring that their solutions align with standards of responsibility and ethical standards in AI implementation.

Chief Information and Compliance Officers should use this to discover providers that ensure seamless generative AI adoption, focusing on improving data integrity and scalability within their company's information systems.

Chief Data and AI Officers should use this to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for leveraging data in generative AI solutions.
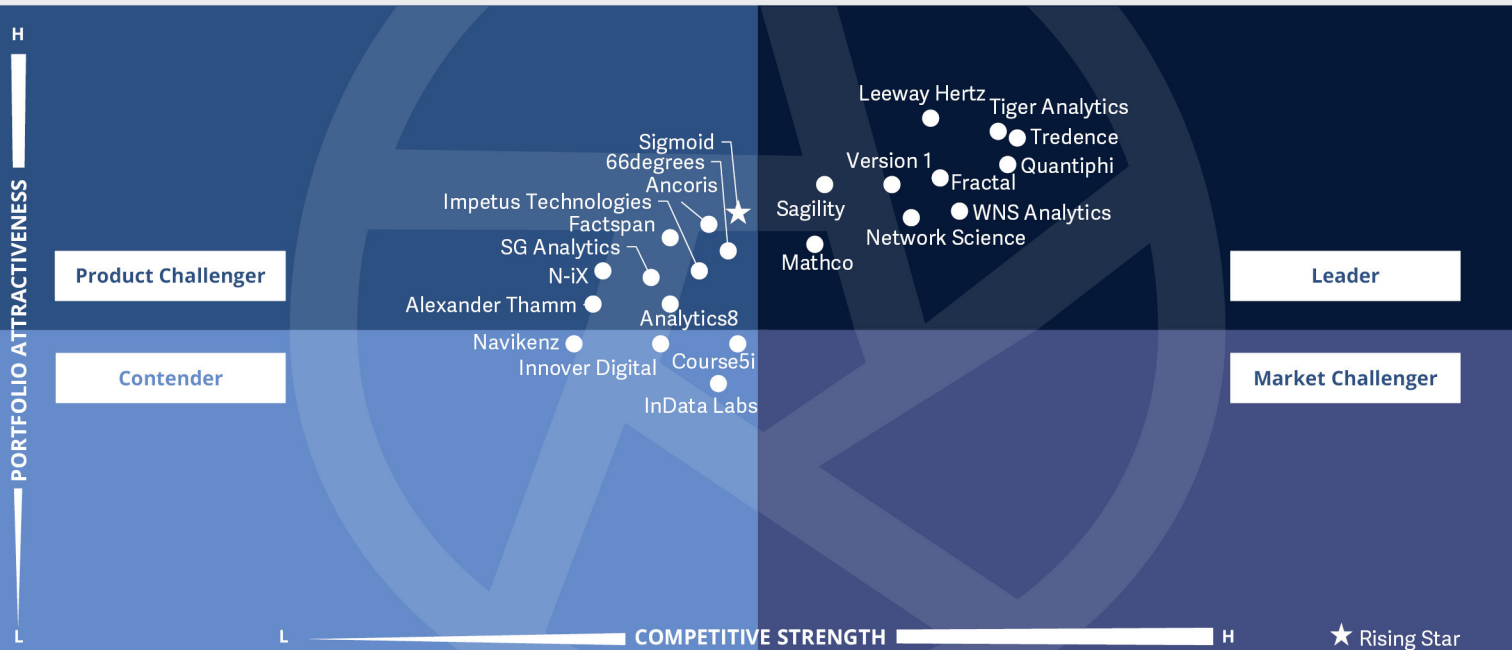
LoB managers should use this for improving customer experiences, drive innovation, and maintain a competitive edge in their respective markets, using generative AI.

ISG Provider Lens™

Generative AI Services
Strategy and Consulting Services - Specialists

Global 2024

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

L

Leeway Hertz

Tiger Analytics
Tredence

Sigmoid
66degrees
Ancoris
Impetus Technologies
Factspan
SG Analytics
N-iX
Alexander Thamm
Navikenz
Innover Digital

Version 1
Fractal
Quantiphi

Sagility
WNS Analytics
Network Science

Mathco

Analytics8
Course5i
InData Labs

Leader

Market Challenger

L   COMPETITIVE STRENGTH   H

★ Rising Star

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Strategy and Consulting Services - Specialists

Definition

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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 are expected to offer strategic guidance on developing training programs, establishing clear communication channels, fostering a GenAI culture and incorporating new advancements and best practices in alignment with evolving needs and industry standards.

By partnering with a qualified service provider — offering strategy, consulting and advisory services — enterprises can unlock the full potential of GenAI and gain a significant competitive edge.

Eligibility Criteria

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5. Have **partnerships** with technology providers, academia and startup ecosystems

6. Invest in the **intellectual property** of **accelerators, tools, frameworks** and platforms

7. **Develop and implement ethical frameworks for responsible AI** use, prioritizing data quality, **fairness, transparency and accountability and mitigating bias and hallucination**

8. Facilitate **human-in-the-loop strategies** and ethical standards

9. **Guide enterprises** and internal teams through GenAI adoption with **effective communication, training and ongoing support**

iSG Provider Lens™ GENERATIVE AI SERVICES QUADRANT REPORT | NOVEMBER 2024 **40**

Observations

Specialist service providers are advancing their strategy and consulting services, prompted by evolving industry demands and developments in technology. They are refining their consulting services with a strong emphasis on expanding enterprise consulting teams and redefining customer profiles to better serve large-scale organizations. Strategic partnerships and alliances are being forged in this space to enhance service capabilities, while scalable solutions are being developed to address diverse enterprise needs.

The focus of service providers on dedicated Generative AI (GenAI) CoEs highlights the importance of centralizing expertise and leadership in initiatives related to this advanced technology. These CoEs are also deploying automated agents designed for specific business contexts and exploring a range of use cases and applications.

Several industry trends are shaping the landscape. Organizations are increasingly adopting AI-driven innovations, integrating sophisticated technologies into decision-making processes and personalizing customer interactions. There is also a growing emphasis on managing organizational change, ensuring workforce readiness and upholding the ethical use of GenAI. The demand for customized solutions for industry-specific needs is on the rise, reflecting the need for seamless integration of GenAI with existing systems and processes.

From the 79 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and 1 Rising Star

Fractal

Fractal provides a robust, responsible AI framework and is committed to GenAI knowledge sharing. This, in turn, fosters a collaborative environment that supports innovation, while ensuring ethical practices and transparency.

LeewayHertz

LeewayHertz offers advanced GenAI solutions in the form of tools and resources and displays a strong commitment to ethical practices, ensuring responsible development and deployment across industries.

✳ MathCo

MathCo has established a client-centric approach, offering tailored consultative services, complemented by comprehensive talent development initiatives. This approach empowers organizations to enhance their GenAI capabilities and foster growth in emerging technologies.

Network Science

Network Science offers clear success metrics and detailed documentation to help businesses seamlessly adopt GenAI solutions, while ensuring streamlined execution across projects.

quantiphi

Quantiphi focuses on leadership education, offering collaborative workshops and thus equipping professionals with the skills needed to navigate and implement GenAI-driven solutions effectively.

Sagility

Sagility is focused on expanding its GenAI capabilities, as evidenced from its recent acquisitions. It aims to offer comprehensive resources to help businesses leverage advanced AI technologies effectively.

Tiger Analytics

Tiger Analytics provides tailored change management solutions and a robust analytics road map alongside comprehensive resources that guide organizations through GenAI adoption and optimization of their data-driven strategies.

TREDENCE
Beyond Possible

Tredence offers robust risk mitigation strategies and solutions designed to accelerate time-to-value and provides comprehensive resources to help businesses efficiently implement and realize the benefits of GenAI.

Version 1

Version 1 provides dedicated support for AI CoEs and strategic data use, offering comprehensive resources to help organizations integrate and optimize GenAI solutions effectively.

WNS

WNS Analytics leverages robust consulting frameworks and cultivates innovation through co-creation, driving advanced solutions in the GenAI space.

SIGMOID

Sigmoid (Rising Star) offers comprehensive talent development and enhanced data management strategies, including extensive resources and tools to support organizations in advancing their GenAI capabilities and optimizing data-driven decision-making.

Development and Deployment Services - Large Providers

Development and Deployment Services - Large Providers

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating large providers offering generative AI development and deployment services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each large providers addresses critical challenges faced globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Large service providers offer end-to-end AI solutions, covering everything from data preprocessing to cloud infrastructure optimization. Their ability to scale AI deployments across global operations makes them ideal for enterprises seeking consistent generative AI implementation across regions. Additionally, strong partnerships with tech giants like AWS, Microsoft Azure, and OpenAI enable them to deliver cutting-edge solutions using the latest cloud and AI innovations.

Enterprises require comprehensive generative AI development and deployment services that are scalable across the enterprise. They often engage with large service providers to address complex data, security and compliance requirements and solutions that encompass end-to-end implementation, ensuring they are adaptable and customized to fit specific enterprise requirements. Service providers are focusing on delivering tailored solutions that align with business objectives, providing measurable value and supporting long-term success in the evolving landscape of generative AI technologies.

LoB managers should read this report to gain insights into providers that can assist in managing the generative AI solution, aligning it with business goals and customer needs
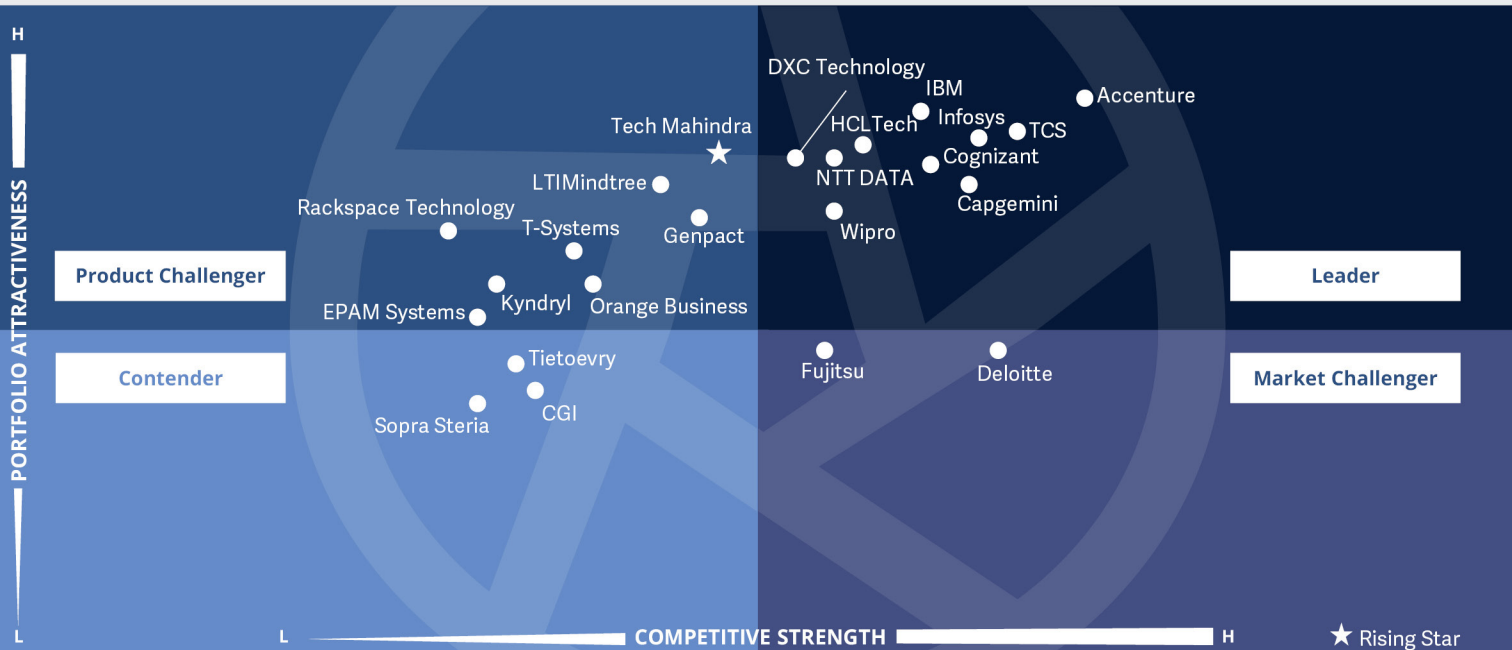
Chief Data and AI Officers should read this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for leveraging data in generative AI solutions.

Chief Information Officers should read this report to discover providers that ensure seamless generative AI adoption, focusing on improving data integrity and scalability within their company's information systems.

ISG Provider Lens™

Generative AI Services
Development and Deployment Services - Large Providers

Source: ISG RESEARCH

Global 2024

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

Tech Mahindra ★

LTIMindtree

Rackspace Technology

T-Systems

Genpact

EPAM Systems   Kyndryl   Orange Business

Tietoevry

Sopra Steria   CGI

DXC Technology

HCLTech   IBM   Infosys   Accenture

NTT DATA   Cognizant   TCS

Wipro   Capgemini

Fujitsu   Deloitte

Leader

Market Challenger

L ──────────── COMPETITIVE STRENGTH ──────────── H

★ Rising Star

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Development and Deployment Services - Large Providers

Definition

In this quadrant, ISG evaluates providers offering development and deployment services to help enterprises create PoCs, determine minimum viable product (MVP) and productionize GenAI solutions, while providing monitoring and management support.

ISG opines that the operational reality of deploying a GenAI solution is daunting, requiring a unique blend of technical expertise, industry knowledge and operational best practices to ensure successful model training, deployment and management.

Service providers should assist with implementing cost-effective cloud infrastructure options tailored to industry-specific needs to optimize resource allocation for efficient model training and deployment and minimize time and costs. Also, they should guide enterprises in selecting appropriate platforms and tools for data preprocessing, model training and experimentation. Providers are also expected to support in fine-tuning pre-trained models for specific use cases and establish LLMOps practices for monitoring,

retraining models and optimizing performance. In addition, they are expected to implement robust security protocols to protect sensitive data throughout the lifecycle of an AI-based solution, encompassing encryption, access control and compliance with industry-specific data privacy regulations. They should also assist with deploying a fine-tuned AI model and seamlessly integrating it with existing systems to ensure smooth productionization.

ISG recommends enterprises set up partnerships with providers to alleviate upfront costs and management burdens. This would enable them to focus on core business activities, while harnessing the power of GenAI.

Eligibility Criteria

1. Have a deep **understanding of cloud platforms** and **resource allocation** for **training and running models** based on use cases

2. Expertise in **optimizing training** for utilizing **compute resources efficiently** in **minimum time**

3. Experience in **fine-tuning pre-trained models** for industry-specific requirements and understanding the nuances of domain data

4. **Have 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 performance** of fine-tuned models

6. **Deep understanding of infrastructure** requirements for deploying GenAI models, including **containerization and scalable server** setups

7. **Have strong security practices for model deployment, data transmission and access controls**

Development and Deployment Services - Large Providers

Observations

As enterprises increasingly harness the potential of Generative AI (GenAI) to drive innovation and enhance CX, large sized GenAI service providers are enhancing their capabilities to deliver these advanced technologies effectively. They are investing in scalable AI models that can be customized across industries and developing full-stack AI solutions that include infrastructure, data pipelines, APIs and cognitive services. They are also focusing on creating reusable AI assets and libraries to accelerate development and deployment of GenAI solutions. To build effective GenAI solutions, providers use various approaches such as fine-tuning pre-trained models, applying retrieval augmented generation (RAG) techniques, utilizing small language models (SLMs) or developing large language models (LLMs) from scratch.

Effective deployment is equally critical; providers are ensuring seamless integration with clients' technology environments and business objectives. This includes

addressing scalability and security concerns through cloud-native and hybrid cloud platforms, ensuring robust data governance and enforcing the necessary compliance measures to maintain data quality and security. Moreover, effective LLMOps is essential for managing GenAI models efficiently. This includes ensuring infrastructure scalability, maintaining operational efficiency, fostering continuous model improvement, focusing on data management and enforcing security. All services, from development and deployment to managing GenAI models, are integrated into platforms that streamline the design, construction and operation of these models. By focusing on scalable models, seamless integration and ongoing support, service providers enable enterprises to fully leverage GenAI for business transformation.

From the 79 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture is a clear leader in this quadrant by demonstrating a wide range of use cases across various industries and the entire value chain. Its ability to deliver scalable, enterprise-wide solutions is a key factor contributing to it securing a strong position.

DXC TECHNOLOGY

DXC Technologies' solution portfolio is broad, integrates GenAI and supports a wide range of use cases in client environments, which is the main reason the company has emerged as a Leader in this quadrant.

Capgemini

Capgemini's RAISE framework for reliable, ethical AI solutions development, Gen AI approach for software development lifecycle and ability to leverage rigorous evaluation methods for model evaluation are the factors responsible for its strong position in the quadrant.

cognizant

Cognizant's Neuro AI platform streamlines GenAI integration with enterprise systems, while its accelerators boost CX and operational efficiency. Its Advanced AI Lab propels innovation, contributing to Cognizant securing it market leading position.

HCLTech

HCL Tech's full-stack approach to GenAI includes semiconductor chips, servers, storage, applications and business process transformations. Its partner ecosystem, expertise in agentic technology and multimodal solutions are key factors determining its strong position.

IBM

IBM's strong position in this quadrant is driven by the flexibility, security and scalability of its watsonx platform along with its capability to automate workflows and deploy AI across diverse business and technical functions.

Development and Deployment Services - Large Providers

Infosys through its Topaz platform offers comprehensive Gen AI, analytics and cloud capabilities to accelerate deployment and enterprise transformation. With nearly 50,000 reusable services applied across over 25,000 instances, it enhances its product delivery capabilities.

NTT DATA has a leadership position in this quadrant predominantly due to its ability to build LLMs for industry-specific requirements, as well as end-to-end architectures for production-ready solutions to deliver value to its customers.

TCS's Wisdom Next platform is a distinctive solution that consolidates various GenAI services into one interface, enabling enterprises to quickly adopt GenAI — highlighting TCS' capability.

Wipro's strengths are in its strategic partnerships with leading AI organizations, a strong talent pool, industry accelerators and platforms and its expertise in building custom LLM solutions. These factors are key to its ability to create tailored AI-based solutions for clients.

Tech Mahindra provides a platform for visualizing and experimenting with GenAI, supported by robust patents, accelerators and industry-specific proprietary assets, establishing it as a Rising Star in this quadrant.

Development and Deployment Services - Midsize Providers

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating mid-sized providers offering generative AI development and deployment services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each mid-sized providers addresses critical challenges faced globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Mid-size providers offer highly customizable solutions, tailoring generative AI deployments to specific industry needs, such as healthcare data management or retail personalization, delivering more niche and impactful results. Their specialized focus enables faster time to market, allowing for quicker deployments and real-time iterations. Additionally, they drive industry-driven innovations by co-creating generative AI applications with clients, addressing unique challenges that larger providers might overlook.

Enterprises seek seamless generative AI development and deployment from mid-sized service providers. Their needs include scalable data pipelines, model training, and integration into existing systems. Providers are focusing on delivering customized models tailored to business challenges, while also ensuring continuous performance optimization through monitoring and fine-tuning. Enterprises are relying on service providers for compliance with security standards and regulatory requirements, safeguarding sensitive data. This enables enterprises to deploy cutting-edge AI solutions efficiently, enhancing operations, decision-making, and driving innovation across the enterprise.

LoB managers should read this report to gain insights into providers that can assist in managing the generative AI solution, aligning it with business goals and customer needs.

Chief Data and AI Officers should read this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for leveraging data in generative AI solutions.
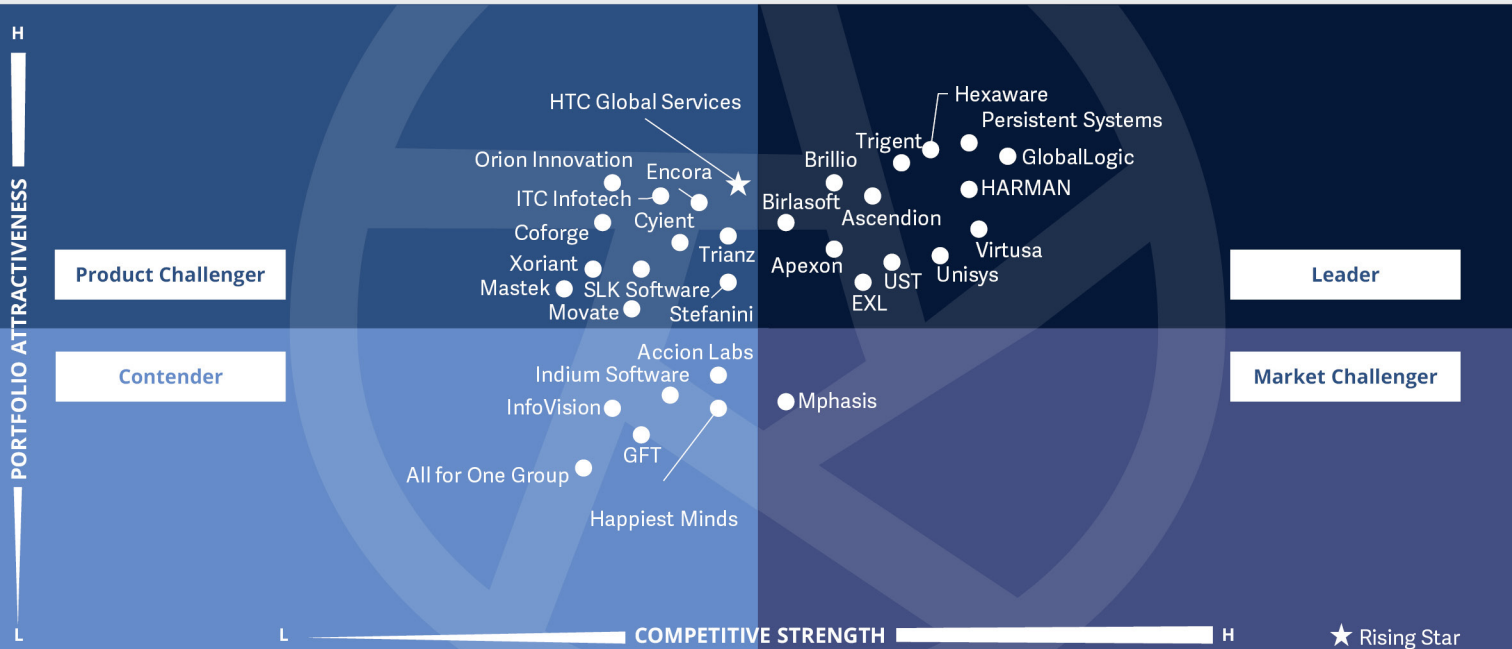
Chief Information Officers should read this report to discover providers that ensure seamless generative AI adoption, focusing on improving data integrity and scalability within their company's information systems.

iSG Provider Lens™   GENERATIVE AI SERVICES QUADRANT REPORT | NOVEMBER 2024   **50**

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Development and Deployment Services - Midsize Providers

Definition

In this quadrant, ISG evaluates providers offering development and deployment services to help enterprises create PoCs, determine minimum viable product (MVP) and productionize GenAI solutions, while providing monitoring and management support.

ISG opines that the operational reality of deploying a GenAI solution is daunting, requiring a unique blend of technical expertise, industry knowledge and operational best practices to ensure successful model training, deployment and management.

Service providers should assist with implementing cost-effective cloud infrastructure options tailored to industry-specific needs to optimize resource allocation for efficient model training and deployment and minimize time and costs. Also, they should guide enterprises in selecting appropriate platforms and tools for data preprocessing, model training and experimentation. Providers are also expected to support in fine-tuning pre-trained models for specific use cases and establish LLMOps practices for monitoring,

retraining models and optimizing performance. In addition, they are expected to implement robust security protocols to protect sensitive data throughout the lifecycle of an AI-based solution, encompassing encryption, access control and compliance with industry-specific data privacy regulations. They should also assist with deploying a fine-tuned AI model and seamlessly integrating it with existing systems to ensure smooth productionization.

ISG recommends enterprises set up partnerships with providers to alleviate upfront costs and management burdens. This would enable them to focus on core business activities, while harnessing the power of GenAI.

Eligibility Criteria

1. Have a deep **understanding of cloud platforms** and **resource allocation** for **training and running models** based on use cases

2. Expertise in **optimizing training** for utilizing **compute resources efficiently** in **minimum time**

3. Experience in **fine-tuning pre-trained models** for industry-specific requirements and understanding the nuances of domain data

4. **Have 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 performance** of fine-tuned models

6. **Deep understanding of infrastructure** requirements for deploying GenAI models, including **containerization and scalable server** setups

7. **Have strong security practices for model deployment, data transmission and access controls**

Observations

The midsize provider segment in the GenAI landscape is characterized by a strong emphasis on customized solutions that enhance operational efficiency and drive impactful business outcomes. These providers are increasingly focusing on delivering tailored AI-driven services that not only align with specific enterprise needs but also ensure compliance and security throughout the implementation process. These providers show strong expertise in AI model training, fine-tuning and deployment, and help clients navigate the complexities of adopting GenAI technologies that integrate seamlessly with existing business infrastructures.

Collaborations with technology giants such as Microsoft, NVIDIA and Google Cloud allow midsize providers to access advanced technologies and enhance their service offerings by integrating proprietary solutions with established AI platforms. Several of these providers show their commitment to creating scalable and adaptable AI models that can be implemented across industries. They prioritize the alignment of AI strategies with key business goals, enabling enterprises to foster innovation, while enhancing CX and unlocking new growth opportunities. They also focus on automation and intelligent decision-making to streamline processes and improve operational efficiencies.

The midsize segment distinguishes itself through strong domain knowledge, particularly in data-intensive industries such as healthcare, retail and finance. Their focus on real-time decision-making, governance and change management ensures that enterprises can adopt GenAI technologies confidently, fostering a culture of data-driven decision-making.

From the 79 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon's services focus on delivering customized AI-driven solutions that enhance business operations and CX. Its expertise spans AI model training, fine-tuning and deployment, with a focus on security, compliance and business alignment.

ASCENDION

Ascendion's approach leverages AI for both technical and strategic gains, helping clients implement AI models that align with their business goals and drive impactful outcomes with an emphasis on scalability and adaptability.

birlasoft

Birlasoft's offerings are focused on enhancing enterprise efficiency through AI-driven automation and intelligent decision-making, with expertise in fine-tuning AI models for specific business needs and ensuring seamless adoption while maintaining compliance and security needs.

Brillio

Brillio's services focus on the integration of cutting-edge AI technologies to deliver outcome-based solutions. It tailors AI models and frameworks to client-specific needs, driving enterprise transformation with an emphasis on governance and change management.

EXL

EXL specializes in using AI to address complex business challenges in data-intensive industries such as healthcare and finance. It combines AI expertise with deep domain knowledge to deliver scalable AI solutions that enhance decision-making and operational efficiency.

GlobalLogic

GlobalLogic helps businesses innovate and transform by integrating AI into their digital ecosystems. Its solutions drive operational excellence and innovation by utilizing AI to automate tasks, enhance CX and create new business models.

HARMAN Digital Solutions focus on healthcare, automotive and and smart technology verticals, helping clients deploy customized AI models to enable real-time decision-making, automation and the use of advanced analytics, ensuring seamless AI adoption across various platforms.

Hexaware's expertise in cloud and data engineering enables the smooth deployment of AI solutions across industries, driving automation, enhancing operational efficiency and unlocking new growth opportunities, with a focus on governance and ethical AI practices.

Persistent Systems' customer-centric AI models deliver scalable, enterprise-grade solutions that integrate with existing infrastructures. It specializes in offerinng tailored deployment services to help organizations harness AI to improve efficiency and foster innovation.

Trigent

Trigent's expertise in AI integration helps businesses deploy AI models that enhance automation, streamline decision-making and provide actionable insights, while ensuring seamless deployment, customization and optimization, with a security and compliance mindset.

Unisys helps businesses integrate AI models into existing systems, creating bespoke AI-driven solutions that align with business objectives. Their approach emphasizes AI governance, security and privacy, ensuring ethical AI deployment and long-term value generation.

UST offers end-to-end GenAI deployment services, enabling businesses to leverage AI for innovation, scalability and operational efficiency. Its solutions include model customization, AI integration and real-time deployment, helping clients accelerate AI adoption.

Virtusa's expertise in AI-driven engineering helps organizations navigate the complexities of deploying GenAI technologies, while ensuring scalability and alignment with strategic objectives, empowering businesses to innovate rapidly and maintain a competitive edge.

HTC Global Services (Rising Star) enables businesses to harness the power of AI for enhanced automation and operational optimization by prioritizing efficiency and agility. It helps deploy AI systems that drive innovation, while maintaining security and compliance standards.

Unisys

Leader

"Unisys takes a broad and tailored approach to AI architecture and GenAI solutions, integrated with a built-in framework for data infrastructure and governance, allowing clients to experiment with and customize AI applications precisely and seamlessly."

Gowtham Sampath, Hemangi Patel and Arjun Das

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys aims to leverage cutting-edge AI solutions to empower clients to unlock enhanced levels of productivity, creativity and innovation. The company fosters a culture of innovation and collaboration with its clients, academic institutions and industry partners to remain at the forefront of AI development, while prioritizing responsible AI practices and ensuring its GenAI solutions are transparent, ethical and aligned with societal values.

Strengths

Application modernization: Unisys' AI-enabled application modernization and development services utilize advanced GenAI-based techniques to enhance legacy system upgrades, accelerate code conversion, and streamline testing and documentation. These tailored models and the integration of GenAI with Ops methodologies enhance code quality and productivity across the SDLC.

Multilingual and tailored solutions: Unisys has expanded its portfolio to include multilingual models and retrieval-augmented techniques, enhancing the training process and broadening the applicability of its GenAI solutions, enabling tailored, cost-effective solutions that meet diverse client needs.

Efficiency-led practices: Unisys offers a well-architected framework and FinOps practices, delivering optimal financial and architectural efficiency. Its cross-business team develops and promotes best practices and standard architectures for LLM-based initiatives for consistent quality and innovation.

Robust security: Unisys' Service Delivery and Management platform, with in-tenant architecture for enhanced security and access controls, addresses key challenges in AI adoption, including security, governance and model federation. The use of pretrained models from reputed sources and containerized deployments ensures seamless integration and scalability.

Caution

Unisys' commitment to remaining agile in a rapidly changing landscape is a strength. But, it should focus on creating thought leadership and awareness on addressing agility challenges related to maintaining consistent service quality and meeting long-term strategic goals amid constant technological evolution.

Generate Content

Development and Deployment Services - Specialists

Development and Deployment Services - Specialists

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating specialist providers offering generative AI development and deployment services. In this quadrant, ISG highlights the current market positioning of these providers for global enterprises and how each specialist providers addresses critical challenges faced globally. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape on a global scale.

Specialist providers deliver niche, high-impact solutions by offering highly specialized, problem-driven generative AI deployments that address specific, high-value business challenges, making them particularly suited for mid-market enterprises or verticals with unique needs. Their strong analytical capabilities ensure that generative AI is deployed with a clear understanding of business objectives, resulting in targeted and effective solutions.

Additionally, their agility allows for rapid deployment of generative AI applications, ensuring fast delivery of value to clients.

Enterprises need comprehensive generative AI development and deployment solutions that are scalable and deliver a strong return on investment. They are seeking specialist service providers that can provide ready-to-deploy solutions which can accelerate generative AI development and require expertise in using optimal technology infrastructure for seamless data integration. Additionally, enterprises value AI-driven analytics to enhance decision-making and require customized solutions to address industry-specific challenges and compliance requirements.

LoB managers should read this report to gain insights into providers that can assist in managing the generative AI solution, aligning it with business goals and customer needs.
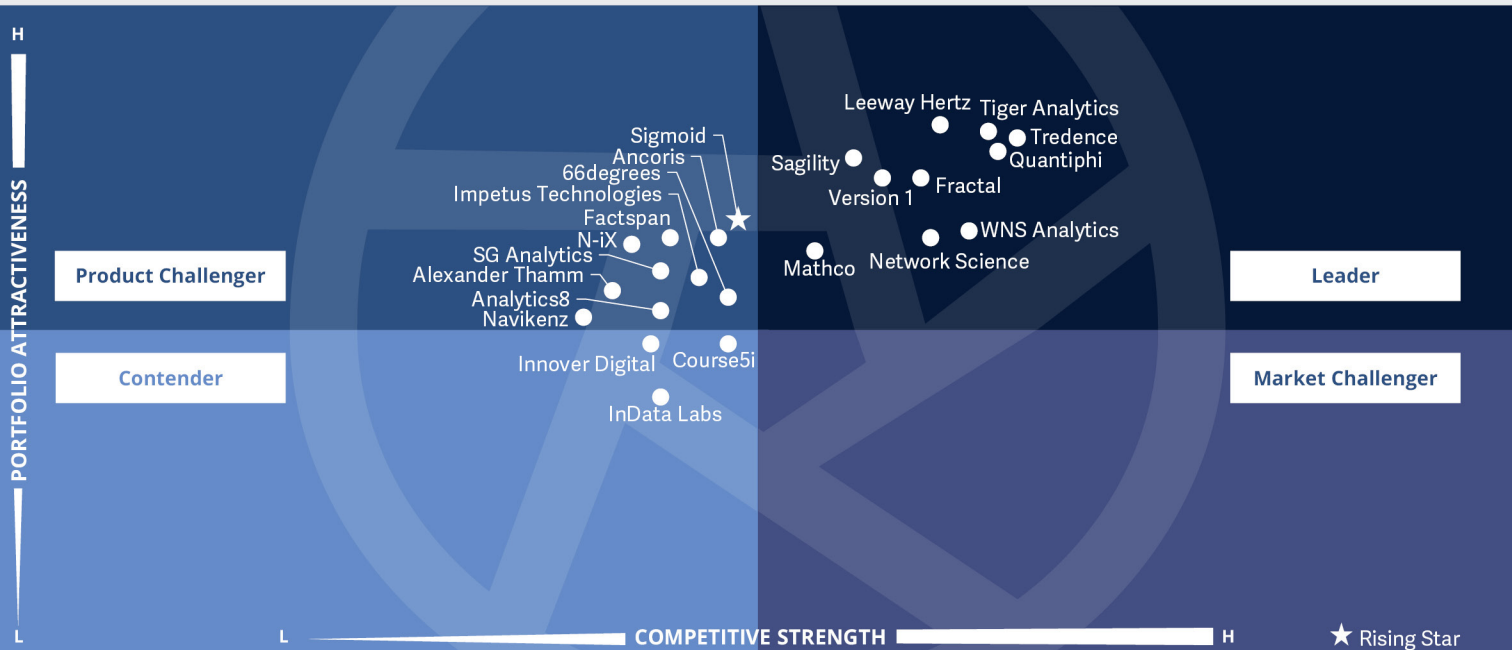
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ISG Provider Lens™

Generative AI Services
Development and Deployment Services - Specialists

Global 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

Leader

Market Challenger

Sigmoid
Ancoris
66degrees
Impetus Technologies
Factspan
N-iX
SG Analytics
Alexander Thamm
Analytics8
Navikenz

Innover Digital   Course5i

InData Labs

Leeway Hertz   Tiger Analytics
Tredence
Sagility   Quantiphi
Version 1   Fractal

WNS Analytics
Mathco   Network Science

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

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

Gowtham Sampath, Hemangi Patel and Arjun Das

Development and Deployment Services - Specialists

Definition

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ISG recommends enterprises set up partnerships with providers to alleviate upfront costs and management burdens. This would enable them to focus on core business activities, while harnessing the power of GenAI.

Eligibility Criteria

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Observations

Specialist service providers have made significant advances in both the development and deployment of Generative AI (GenAI) solutions. One of the key shifts has been the emphasis on rapid prototyping and deployment, enabling customers to swiftly understand the way GenAI can address their specific business challenges. In parallel, the focus on developing industry-specific solutions has increased, with providers increasingly introducing specialized accelerators.

These providers have also prioritized fine-tuning their capabilities to improve model performance, with strategic collaborations with technology firms to accelerate innovation and expand their service portfolios. Investments in digital infrastructures, particularly cloud-native transformations, have enabled increasingly flexible and scalable generative AI deployments.

On the regulatory front, providers are developing responsible AI frameworks to address the growing demand for transparency, accountability and the need for adherence to data privacy regulations. The development of autonomous agents that provide actionable insights based on complex data analysis is also gaining momentum. In addition, efforts to detect and mitigate hallucinations in GenAI outputs are receiving increased attention.

Key trends, such as the need for multimodal models, AI democratization and seamless integration with existing IT infrastructures are also influencing the future direction of GenAI development and deployment.

From the 79 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and 1 Rising Star.

Fractal

Fractal provides seamless GPT integration for enterprises, offering a diverse range of GenAI solutions that enable businesses to enhance productivity, automate tasks and drive innovation across various industries.

LeewayHertz

LeewayHertz offers LLM development capabilities and a comprehensive suite of GenAI solutions for enterprises, enabling them to streamline operations, innovate processes and integrate AI-driven strategies seamlessly into their workflows.

MathCo

MathCo has developed an advanced AI-powered solution, supported by an expert team, to offer tailored GenAI services that help businesses automate processes and bring about digital transformation.

Network Science

Network Science enables rapid deployment of GenAI solutions with a focus on accountability and robust data protection through a multilayered approach that ensures secure and efficient GenAI integration.

Quantiphi

Quantiphi has developed comprehensive GenAI-powered accelerators for an SDLC, supported by strategic technology partnerships and CoEs, enabling streamlined development and innovation for enterprises.

Sagility

Sagility has developed proprietary models designed to enhance efficiency in clinical documentation and coding and provides tailored GenAI solutions that streamline workflows in healthcare and improve data accuracy.

Tiger Analytics

Tiger Analytics leverages GenAI for data engineering, delivering client-centric innovations that streamline data processing, improve efficiency and enable businesses to extract meaningful insights from their data.

Development and Deployment Services - Specialists

TREDENCE
Beyond Possible

Tredence employs a dual approach of Foundry and Factory, offering industry-specific solutions that harness Gen AI to address unique business needs and enhance operational efficiency across sectors.

Version 1

Version 1 delivers GenAI-driven custom solutions that include scalable automation, providing tailored services that streamline processes and enhance efficiency across business applications.

WNS

WNS Analytics offers GenAI-powered productized services with a cloud-agnostic, scalable AI architecture, providing flexible and robust solutions that adapt to various cloud environments and business requirements.

SIGMOID

Sigmoid (Rising Star) provides a customizable LLM validation tool alongside customer-centric, value-driven solutions, enabling businesses to customize GenAI models to their needs and enhance value through targeted innovations.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Generative AI Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Human Resources

Region

▲ **Most satisfied**
Central/South America

▼ **Least satisfied**
Australia/New Zealand

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Public sector

Industry Average CX Score

74.7

▲ Highest CX: 95.0
▼ Lowest CX: 50.0

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 829

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	55.2%
Nearshore	23.1%
Offshore	21.7%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Generative AI Services research 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:
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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Generative AI Services market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Lead Author

Gowtham 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.

Author & Editor Biographies

Co-lead Author

Arjun Das V
Assistant Manager & 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 Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

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 partner 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.

About Our Company & Research

ïSG 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, while 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.

ïSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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REPORT: GENERATIVE AI SERVICES