ISG Provider Lens®

Agentic AI Services

A comparative analysis of service providers enabling autonomous intelligence and maximizing the potential of Agentic AI

Customized report courtesy of:

Infosys®

QUADRANT REPORT | OCTOBER 2025 | GLOBAL

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Enterprises must balance innovation, governance and talent to unlock the full value of agentic AI

Agentic AI is emerging as a transformative force that redefines how organizations think, decide and act. Unlike traditional automation or GenAI, agentic AI systems are designed to autonomously execute business processes, dynamically pursue goals and collaborate across workflows. This shift to agentic AI marks a new chapter in enterprise intelligence, where decision velocity, contextual awareness and orchestration become the cornerstones of competitive advantage. Agents are capable of breaking down objectives into smaller tasks, planning execution strategies, interacting with multiple applications, collaborating with other agents and adapting to feedback. In this sense, agentic AI is designed to function more like a digital employee than a static tool. Although still an emerging market, with experimentation outpacing scaled adoption, agentic AI has already begun to shape the future of how organizations think about productivity, decision-making and business transformation.

Overcoming barriers for agentic AI adoption

The emergence of agentic AI is closely tied to a series of systemic challenges that enterprises face as they attempt to scale their AI ambitions. Perhaps the most fundamental of these is data. Agentic AI demands decision-grade, real-time data that exposes the limitations of traditional data architectures. Many organizations still rely on medallion frameworks and siloed data towers, which are less suited for dynamic agentic workflows. As agents interact differently with data, creating context from raw inputs rather than relying on application logic, enterprises must rethink how they design, govern and distribute data, moving toward architectures that prioritize contextualization, real-time access and seamless integration across platforms.

Governance is another critical concern. While the promise of agentic AI lies in autonomy,

The future of **enterprise AI** lies in **context-aware agents** with strong **orchestration layers.**

the reality is that not many enterprise use cases operate fully autonomously today. These use cases rely on some form of human-in-the-loop (HITL) oversight to safeguard decision quality and compliance. Providers are embedding escalation logic, role-based controls and observability frameworks to ensure agents operate within ethical and operational boundaries. At the center of this lies the orchestration layer, which is emerging as a strategic priority for both enterprises and providers. This layer governs how agents interact with data, other agents and enterprise applications, ensuring alignment with business objectives and compliance mandates. Without such guardrails, the risk of errors, ethical breaches or operational disruptions could undermine trust in the entire model.

Pricing and procurement models are also evolving. Some providers adopt a tool-based or consumption-driven model, while others experiment with outcome- or value-based pricing. Providers and enterprises must cocreate transparent models, as pricing needs to reflect not only usage but also the level of human oversight, integration complexity and business outcomes.

Integration complexity is also a significant concern. Many enterprises operate across sprawling IT ecosystems that combine legacy applications, cloud platforms, ERP and CRM systems, and an increasing array of niche SaaS tools. Deploying agentic AI in such ecosystems is not as simple as layering a new system on top. Agents need seamless access to APIs, secure connections to proprietary datasets, and the ability to work across heterogeneous infrastructures without introducing security or compliance risks. The orchestration challenge is technical and organizational, as IT, operations and business units must collaborate to establish integration pathways, allowing agents to perform meaningfully in production.

Finally, workforce readiness and cultural alignment present subtle but significant barriers. The introduction of agents as digital co-workers creates anxiety around displacement, trust and accountability. Enterprises that fail to address these concerns through reskilling, change management and transparent communication may find employees resisting adoption or misusing the technology. Equally, the lack of standardized skills frameworks for agentic AI complicates talent planning, as organizations struggle to define the roles and expertise required to oversee, maintain and collaborate with agents at scale.

Emerging trends in agentic AI landscape

The agentic AI ecosystem is currently undergoing rapid experimentation, with enterprises, providers and technology partners actively shaping its trajectory. Most deployments today remain simple and model driven, where agents act toward predefined objectives using structured prompts and constrained logic. In practice, the agentic AI market is still concentrated around simple and model-driven agents, largely deterministic in nature and designed for predictable enterprise processes. As the market is gradually becoming more complex, it needs more contextually aware agents that can interpret situational nuances, adapt dynamically to real-time inputs and collaborate with humans and other agents in ways that closely mirror organizational teamwork.

To accelerate this shift, service providers are increasingly investing in prebuilt accelerators, libraries of reusable agent workflows, integration templates and domain-specific modules that help enterprises reduce deployment time and complexity. Portfolio expansion is becoming a strategic priority, with providers not only building broader suites of agentic AI solutions but also verticalizing their offerings to address specific industry needs.

Service providers are also internalizing the adoption of AI agents, proving to be the strongest testbeds before they scale for enterprisewide implementation. HR teams are experimenting with autonomous candidate screening, employee engagement agents, and learning and development assistants. Procurement teams are deploying agents for supplier benchmarking, contract drafting and spend analytics.

Simple Agent

Trigger pre-defined actions under specific conditions.

Act

EXAMPLE:
A simple agent could effect the payment of invoices, including reviewing and approval steps, generating payment advices and journal entries.

Model-driven Agent

Use trained models to respond felexibly to inputs

+Adjust

EXAMPLE:
A model-based agent could forecast cash balances by account or entity over a defined period to determine from where the invoice will be paid.

Goal-driven Agent

Plan, execute and adapt multi-step actions to meet abjectives.

+Evolve

EXAMPLE:
A goal-based agent could maximize the interest earned on cash balances for each account.

Utility-based Agent

Balance competing variables (e.g., cost vs. risk) to optimize outcomes.

+Optimize

EXAMPLE:
A utility-based agent could do the same as a goal-based agent while also considering the value of the banking relationship, uncertainty of projected cash receipts and the costs of cash or FX transfers.

Multi-agent Solution

Multiple agents collaborate to perform a task.

Collaborate

EXAMPLE:
A multi-agent solution could orchestrate any of these agents to work in concert together to achieve payment execution.

Audit and compliance functions are using agents to monitor transactions and flag anomalies. In parallel, the software development lifecycle (SDLC) is seeing tangible transformation, with agents generating code, running automated tests, managing documentation and detecting vulnerabilities, significantly reducing development cycle times. Beyond these internal use cases, business process transformation is beginning to take shape, particularly in customer service, where multiagent systems are orchestrating more complex customer journeys with reduced human intervention.

As the market progresses from single assistants and goal-based agents toward ensembles of specialized agents working in collaboration, eventually paving the way for multiagent ecosystems orchestrated across enterprise workflows, the following trends are becoming increasingly prominent:

- Orchestration frameworks as the backbone: Orchestration frameworks are fast emerging as the foundation of agentic AI deployments. Providers are embedding orchestration capabilities into their platforms as key differentiators, with the next wave expected to evolve into intelligent decision layers that optimize agent collaboration in real time, making orchestration central to scaling agentic AI.
- Governance and feedback loops: Continuous monitoring, observability tools, escalation logic and HITL mechanisms are becoming essential to balance autonomy with oversight and to build enterprise trust. Over time, governance frameworks are expected to evolve beyond compliance into continuous performance optimization systems, where feedback improves agent reliability, adaptability and collaboration.

Together, these trends highlight a market steadily maturing from bounded, deterministic pilots into more adaptive, scalable and enterprisewide agentic ecosystems. While still early in its journey, the building blocks are being implemented to support the next phase of intelligent autonomy in the enterprise.

Key enablers for scalable agentic AI deployment

Several positive signals validate the growing maturity of this market. However, certain focus areas will require sustained attention to ensure success. Firstly, the pace of technological evolution demands modular, flexible architectures that can adapt to emerging innovations without locking enterprises into rigid vendor ecosystems. Secondly, the balance between autonomy and control will remain paramount, requiring clear escalation policies, safe sandboxes and robust oversight mechanisms to prevent drift, while still capturing the benefits of autonomy. Thirdly, cost management must be addressed proactively, as agentic systems can generate hidden consumption patterns that quickly escalate without careful monitoring of utilization and optimization of model choices. Finally, talent and operating models need to evolve, with investments in upskilling, change management and redesigned workflows to enable seamless human-agent collaboration.

In conclusion, agentic AI is both a transformative opportunity and a strategic responsibility. The organizations that succeed will be those that combine ambition with discipline, adopting early while embedding the right guardrails, governance and human alignment. For service providers, the imperative is to deliver solutions that balance innovation with trust, scalability with flexibility, as well as that balance efficiency with accountability. The next 12 to 24 months will be critical in moving from experimentation to enterprisewide adoption.

Agentic AI is emerging as a digital workforce capable of executing tasks, collaborating with other agents and adapting dynamically. While early deployments are still limited in scope, advances in data strategy, continuous governance and multiagent collaboration are paving the way for enterprisewide transformation.

Provider Positioning

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	Agentic AI Development and Deployment Services
Accenture	Leader
Accion Labs	Contender
Apexon	Product Challenger
Ascendion	Product Challenger
Atos	Market Challenger
Birlasoft	Product Challenger
Brillio	Product Challenger
Capgemini	Leader
Coforge	Product Challenger
Cognizant	Leader

Provider Positioning

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	Agentic AI Development and Deployment Services
DXC Technology	Leader
EXL	Rising Star ★
Firstsource	Product Challenger
Genpact	Product Challenger
Happiest Minds	Contender
HCLTech	Leader
Hexaware	Product Challenger
HTC Global Services	Product Challenger
IBM	Leader
Infosys	Leader

Provider Positioning

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	Agentic AI Development and Deployment Services
Innova Solutions	Contender
ITC Infotech	Product Challenger
LTIMindtree	Product Challenger
Microland	Contender
NTT DATA	Leader
Persistent Systems	Rising Star ★
Rackspace Technology	Product Challenger
SLK Group	Contender
Sutherland	Product Challenger
TCS	Leader

Provider Positioning

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	Agentic AI Development and Deployment Services
Tech Mahindra	Market Challenger
Trigent	Product Challenger
Unisys	Market Challenger
Virtusa	Product Challenger
Wipro	Product Challenger
Zensar Technologies	Market Challenger

The study analyzes market trends, provider capabilities and competitive dynamics shaping the evolution of **agentic AI** and autonomous systems.

Simplified Illustration Source: ISG 2025

Agentic AI Development and Deployment Services

Definition

ISG defines Agentic AI as the ability to take autonomous actions, involving multiple processes or systems, based on understanding of the environment and the goals that should be achieved. Agentic AI is an emerging yet transformative force in 2025, redefining how enterprises automate, optimize and scale operations. Unlike traditional AI, which relies on predefined workflows, agentic AI autonomously plans, executes and adapts to tasks with minimal human intervention. By integrating reasoning, memory and tool use, it enhances decision-making, streamlines processes and accelerates enterprise innovation.

- Agentic AI systems enable complex and multistep task execution across business functions, reducing reliance on manual inputs and improving efficiency.
- Memory-driven AI and contextual learning enhance adaptability, allowing agentic AI systems to recall past interactions, refine responses and continuously improve performance.
- Integration of multimodal AI capabilities fosters intelligent automation, driving personalized and data-driven insights.
- Agentic AI is reshaping enterprise workflows, from automated customer support and AI-driven analytics to self-optimizing operations in industries such as finance, healthcare and supply chain.
- Responsible AI practices and governance frameworks ensure ethical, transparent and regulatory-compliant AI behavior, mitigating risks such as bias and unintended automation failures.

While agentic AI unlocks new frontiers in autonomous problem-solving and intelligent task execution, businesses must navigate challenges such as scalability, decision transparency and seamless integration with legacy systems. Collaborating with leading providers ensures strategic adoption, enabling enterprises to harness goal-driven and self-learning AI systems for sustained innovation and competitive advantage.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following one quadrants for services/ solutions: Agentic AI Development and Deployment Services.

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

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

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

Provider Classifications

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

- **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.

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

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

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

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

Agentic AI Development and Deployment Services

Who Should Read This Section

This report is valuable for service providers offering **Agentic AI Development and Deployment Services** globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief data and AI officers

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

Chief information officers

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

CoE Leaders

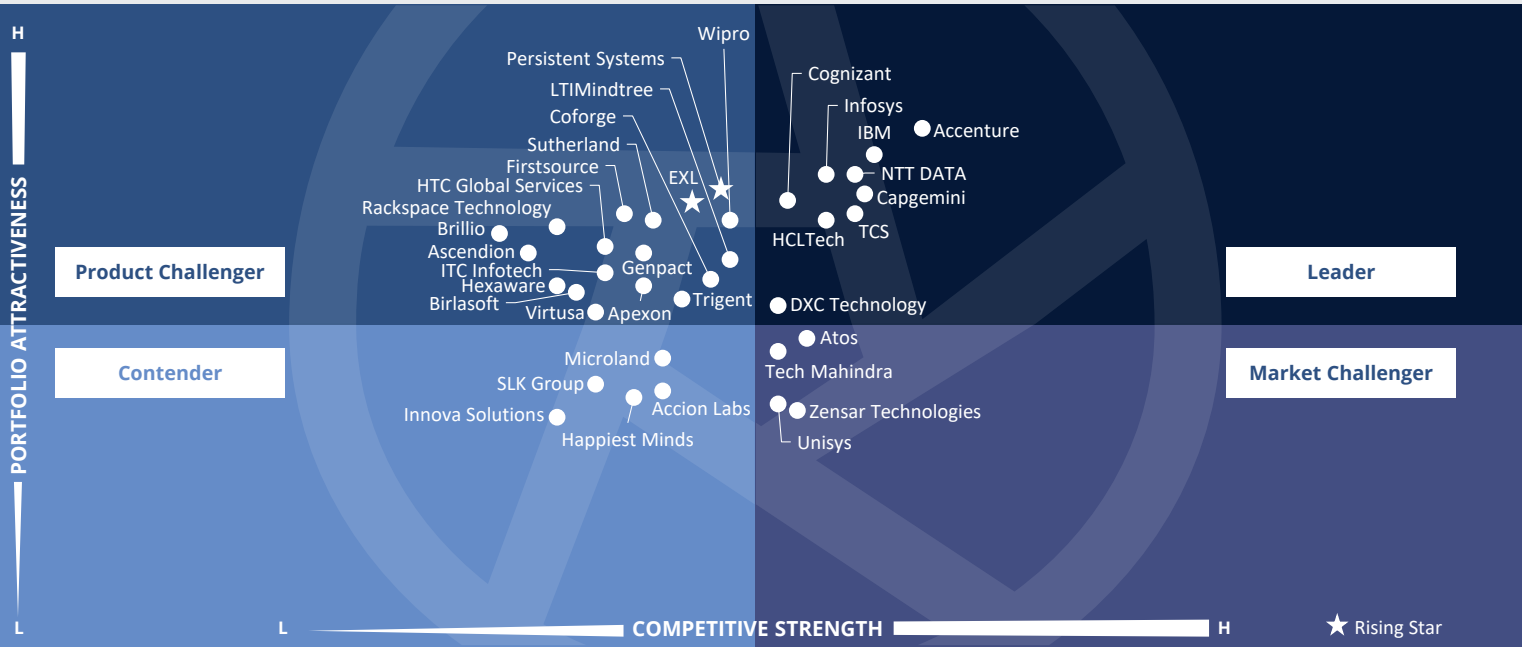
Should read this to understand the nuances of the technology maturity and implementation capabilities of different providers across the regions. It also provides insights into the latest innovations in multi-agent collaboration, orchestration capabilities with enterprise systems, and security capabilities around agentic AI development and deployment.

ISG Provider Lens®

Source: ISG RESEARCH

Agentic AI Services
Agentic AI Development and Deployment Services

Global 2025



This quadrant assesses service providers that enable **Agentic AI adoption** through **strategic frameworks**, emphasizing **trust, human-AI collaboration**, and **governance** while delivering measurable value across **enterprise functions**.

Gowtham Kumar Sampath, Hemangi Patel, Srinivasan P N

Definition

In this quadrant, ISG evaluates agentic AI service providers that autonomously plan, execute and refine tasks with minimal human input. These solutions enhance enterprise efficiency by integrating reasoning, adaptive learning and multimodal interactions for intelligent decision-making.

Agentic AI systems use task orchestration, memory management and self-correction mechanisms to optimize workflows and automate processes. AI agents can assess objectives, interact with external tools and collaborate with other agents or humans. Providers incorporate LLM evaluation, multimodal processing and reinforcement learning to enhance adaptability and performance.

To ensure responsible AI, providers implement governance frameworks, ethical safeguards and transparency measures to mitigate bias and align AI with enterprise policies.

By bridging automation with intelligence, agentic AI enables scalable and goal-driven automation, helping enterprises achieve outcomes with productivity and precision.

Eligibility Criteria

1. Showcase ability to **design agentic AI solution from ideation, value creation, roadmap and strategic business alignment**
2. Showcase POCs of agentic AI systems that are capable of (not limited to) **autonomous planning, execution and self-improvement** across enterprise workflows.
3. Develop agentic AI solutions integrating **seamless human intervention**, ensuring **AI oversight, real-time corrections and adaptive decision control** in critical workflows.
4. Develop AI ecosystems where multiple agents can **communicate, delegate tasks and share insights**, mimicking human-like teamwork.
5. Establish **bias mitigation, transparency, ethical AI safeguards and compliance frameworks** to ensure accountability and fairness.
6. Implement **LLM evaluation, fine-tuning and reinforcement learning** to enhance AI responsiveness and accuracy.
7. Build and deploy solutions that integrate **multi-modal structured and unstructured data** to support complex and real-world decision-making.
8. Demonstration on variety of industry specific and functional **agentic AI applications, with solution demonstrations and success stories**
9. Showcase how **agentic AI solutions delivered business outcomes such as improve efficiency, reduce costs, accelerate decision-making and drive tangible business outcomes**
10. Demonstrate **ecosystem partnerships** with hyperscalers, technology providers, academia and startup ecosystems

Observations

Agentic AI, which is expected to bring autonomous decision-making capabilities, is emerging as a transformative force in the enterprise technological landscape. Unlike traditional AI systems, agentic AI can proactively initiate actions, adapt to dynamic environments and collaborate with humans and other agents to achieve complex objectives. This paradigm shift is pushing enterprises to rethink their digital strategies and operational models. Service providers are beginning to integrate agentic AI into their consulting portfolios, offering strategic guidance and implementation frameworks that align with enterprise goals. These frameworks help organizations identify high-impact use cases such as different financial processes, customer engagement and the SDLC, where agentic AI can deliver measurable value.

However, the successful deployment of agentic AI requires more than technical integration. It demands a cultural shift within organizations, emphasizing trust, transparency and human-AI collaboration. Providers play a key role by assessing readiness across data maturity, governance, skills and ethics. Training and change management are central to this evolution. Enterprises must upskill employees to collaborate with autonomous agents, fostering cocreation and continuous learning. Governance frameworks are essential to ensure ethical operations, compliance and data integrity. As enterprises scale deployments, service providers help define success metrics, balancing efficiency with responsible AI use. Real-time monitoring and refinement of agentic behaviors are becoming key to sustainable value creation.

From the 60 companies assessed for this study, 36 qualified for this quadrant, with nine being Leaders and two Rising Star.

accenture

Accenture is driving agentic AI adoption through its AI Refinery, Trusted Agent Huddle and NVIDIA partnership, enabling faster deployment, secure multi-agent collaboration and enterprise-grade scalability, positioning itself as a Leader in this quadrant.

Capgemini

Capgemini accelerates enterprise adoption of agentic AI through its RAISE platform, NVIDIA partnership and multiagent architecture, enabling secure, scalable deployments where AI agents act as trusted collaborators in delivering industry-specific impact.

cognizant

Cognizant's platform-led agentic orchestration spans IT Ops and SDLC, with a growing focus on observability and responsible AI, making it a Leader in this quadrant.

DXC TECHNOLOGY

DXC Technology combines consulting expertise, its AI Workbench and strategic platforms to help enterprises identify, deploy and integrate agentic AI use cases. With reusable connectors, orchestration and governance frameworks, it ensures secure and scalable adoption.

HCLTech

HCLTech scales agentic AI via its enterprise platform, protocol-led collaboration and autonomous IT Ops, making it a leader in this quadrant.

IBM

IBM watsonx.ai, watsonx Orchestrate® and watsonx.governance® collectively provide an integrated platform to build, deploy, manage and govern AI agents, enabling secure, compliant and scalable agentic AI adoption, making it a Leader in this quadrant.

Infosys is leveraging agentic AI to transform enterprise operations. By integrating customized and modular AI agents with existing systems, Infosys is bridging gaps in traditional workflows and increasing operational efficiency and transparency, emerging as a Leader.

NTT DATA is building a comprehensive agentic AI ecosystem, leveraging strategic partnerships and modular frameworks to deliver industry-specific solutions that extend from POCs to scalable production environments.

TCS combines deep engineering, domain-specific SLMs and agentic orchestration to drive enterprise-scale transformation. Their pragmatic, process-first approach and platform maturity position them as a Leader in applied Agentic AI.

EXL (Rising Star) embeds agents into domain workflows such as claims and audit. Its strong compliance automation, structured rollout and focus on delivering business outcomes make it a Rising Star in this space.

Persistent Systems (Rising Star) focuses on SDLC-wide agent deployment and secure orchestration for regulated industries, with adaptive document intelligence and agentic DataOps,which make it a Rising Star in this quadrant.

Leader

"Infosys' approach to agentic AI demonstrates a robust integration of modular AI solutions that enhance existing enterprise capabilities and redefine process efficiency and effectiveness across industries."

Hemangi Patel, Srinivasan P N

Infosys

Overview

Infosys is headquartered in Bengaluru, India. It has more than 323,500 employees across 59 countries. In FY25, the company generated $19.3 billion in revenue, with Financial Services as its largest segment. Infosys has built an Agentic Foundry that can carry out horizontal enterprise business functions, while retaining the flexibility for industry-specific customizations. The provider with close to 4,000 FTEs trained on agentic AI also aims to train over 80,000 FTEs to be agentic AI-ready in the next few quarters.

Strengths

Agentic framework: Infosys' Agentic Foundry enables rapid creation, orchestration and deployment of reliable AI agents. It supports pro-code development, multiagent validation and telemetry-based learning, ensuring production-grade reliability across diverse enterprise environments.

Industry-specific agent ecosystem: With over 250 agents tailored to verticals such as telecom, finance and auditing, Infosys delivers contextual automation. Examples include telco network troubleshooting agents and audit agents that reduce manual effort by 40 percent and improve time to market by 45 percent.

Strategic partnerships and innovation: Infosys collaborates with hyperscalers and hardware providers such as Microsoft Azure, Google Cloud and NVIDIA, leveraging platforms such as Azure OpenAI and AWS Bedrock. These alliances accelerate agent deployment and enhance model diversity, including the use of GPT-4, Phi-3.5 and Claude.

Outcome-driven engagement models: Infosys adopts hybrid and outcome-based pricing, aligning agentic implementations with measurable business KPIs. Demonstrated results include 50 percent productivity gains, cash flow improvement and 90 percent onboarding time reduction.

Caution

While Infosys' solutions focus on partial autonomy and human-in-the-loop processes, advancements toward full autonomy and comprehensive multiagent orchestration require further development to realize their full potential across complex enterprise environments.

Appendix

Methodology & Team

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

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

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

The study was conducted in the following steps:

1. Definition of Agentic 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Author

Gowtham Kumar Sampath

Assistant Director and Principal Analyst

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

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

Lead Author

Hemangi Patel

Senior Manager and Principal Analyst

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

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

Lead Author and Research Analyst

Srinivasan P N

Senior Lead Analyst

Srinivasan P N is a Senior Lead Analyst at ISG. He is responsible for authoring ISG Provider Lens® studies on Digital Engineering and AWS Ecosystem Services. His areas of expertise are engineering services, cloud services, and digital transformation. Srinivasan has over a decade of experience in the technology research industry. In his prior role, he delivered research on both primary and secondary research capabilities.

Srini is interested in understanding the startup ecosystem, M&As of the tech industry and engineering service capabilities. He also works with advisors with his research skills and writes papers about the latest market developments in the industry.

Study Sponsor

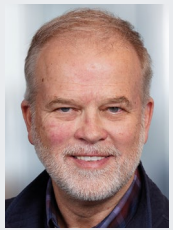
Namratha Darshan

Chief Business Leader

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

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

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

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

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

ISG Provider Lens®

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

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

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ISG

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

For more information, visit isg-one.com.

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OCTOBER, 2025

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