

IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment

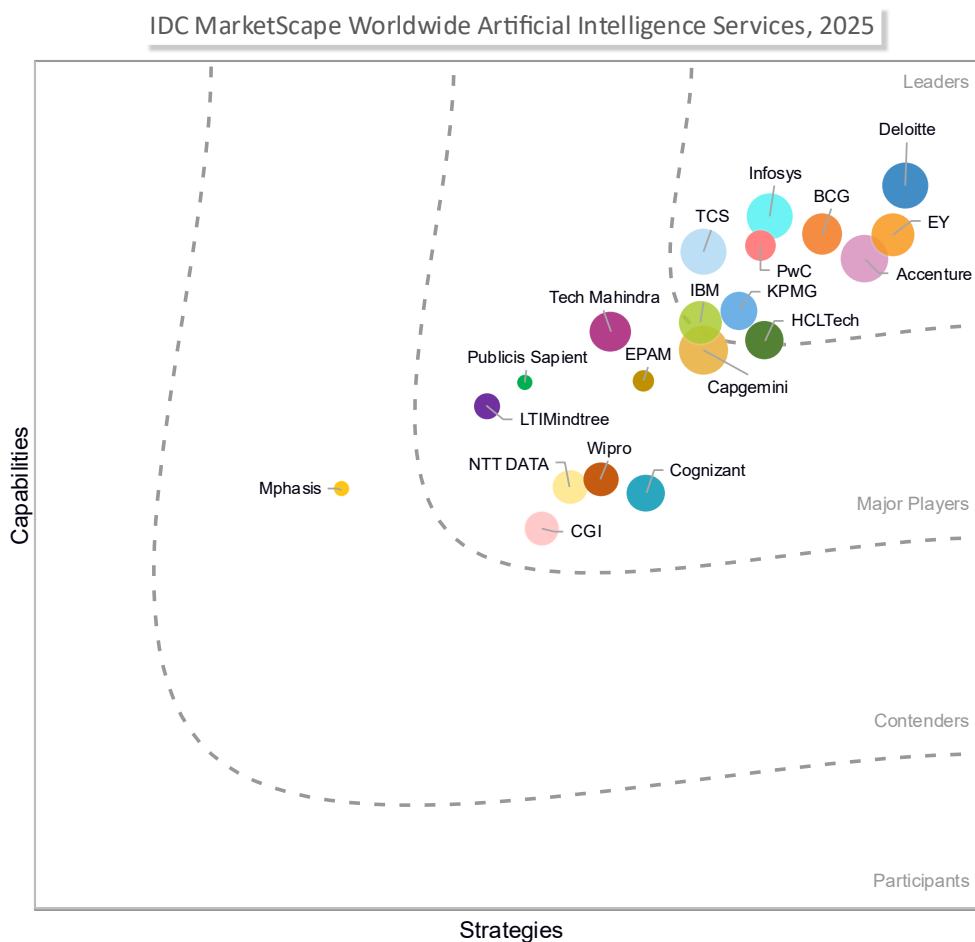
Jennifer Hamel Reid Sherard

THIS MARKETSCAPE EXCERPT FEATURES INFOSYS AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Artificial Intelligence Services Vendor Assessment



Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment (Doc # US52978525).

IDC OPINION

This IDC study represents a vendor assessment of the 2025 worldwide artificial intelligence (AI) services market through the IDC MarketScape model. This is the fourth iteration of this assessment, and IDC last assessed this market in 2023. With each iteration, we have revised our evaluation criteria and buyer perception survey instrument to refine our assessment methodology and reflect market evolution.

Much has changed in the AI market in the two years since the previous IDC MarketScape assessment on worldwide AI services published, just a few months after ChatGPT captured public consciousness. Potentially transformative enterprise GenAI use cases dominated conversations across industries throughout 2023, and this excitement contributed to the technology rapidly gaining C-suite attention and investment support. In 2024, organizations encountered many obstacles to scaling their AI initiatives, such as internal skills gaps, excessive implementation difficulty and cost, misalignment of use case priorities and stakeholder needs, and poor data access and quality.

IDC research indicates that, in 2025, organizations are looking to pivot from endless experimentation and pilot projects toward scaled, production-grade AI deployments. Effective AI adoption and scaling require addressing a range of business and technology challenges. IDC has identified critical building blocks in setting up the foundation for an AI-fueled business, which includes an AI-fueled operational plan unifying strategy, governance, and workforce development, as well as an AI-ready technology operating model for applications, AI platforms, data, and infrastructure.

The rapid emergence of agentic AI in recent quarters adds further complexity to organizations' AI strategies. As AI techniques continue to advance, addressing the fundamental building blocks of AI, adoption remains critical to progressing out of endless experimentation cycles. Organizations continue to rely on trusted services partners with deep expertise, collaborative engagement approaches, and dependable delivery capabilities to drive ROI and business value from AI investments. IDC research shows that strategic support with project prioritization, effective coordination between IT and line-of-business teams, and access to the right developer skills and effective tools are key success factors enabling organizations to achieve the highest levels of success with their AI initiatives.

We continue to observe AI services vendors succeeding in the market by both clearly articulating their strategies for enabling clients' adoption of AI solutions and readily demonstrating their current capabilities and proof points through existing client engagements. We also note that the services industry is undergoing its own transformation due to AI infusion. Resilient and forward-looking vendors are updating best practices and applying lessons learned from their internal AI efforts to help clients navigate adoption and scaling challenges and to deliver desired outcomes more quickly and efficiently.

In this assessment, IDC evaluated AI services vendors across scoring criteria based on information provided in writing and through extensive briefings by participating vendors. IDC also collected feedback from customers on their perception of the key characteristics and the capabilities of these vendors. Key findings include:

- The most critical vendor attribute for successful AI services engagements, according to IDC's *Artificial Intelligence Services Buyer Perception Survey*, remains "ability to achieve business outcomes." The perceived priority of this attribute over all others was unchanged from the 2023 study.
- When buyers were asked about the top business objective driving their engagement of their artificial intelligence services vendor, at a worldwide level, the most frequent responses were "increased operational efficiency," "faster innovation," and "cost savings." Thirty percent of the buyers we surveyed reported they achieved 30% or greater improvement in measurable KPIs from their AI services engagement.
- The top-rated vendor attribute, in aggregate, was the ability to "integrate vendor project team with internal team." Again, the highest satisfaction rating for this vendor characteristic is consistent with findings of the 2023 study.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This research includes analysis of AI services providers with global scale and broad portfolios spanning IDC's research coverage of the AI services market. In determining the group of vendors for analysis in this IDC MarketScape, IDC considered the following set of inclusion criteria:

- Worldwide AI services revenue of at least \$500 million over the past calendar year
- AI services revenue generated in each major geographic region (i.e., Americas, EMEA, and Asia/Pacific)
- AI services offerings spanning the life cycle of business and IT services (e.g., project based, managed, support, and training)

- AI services offerings addressing a range of industry verticals and business functions
- Offers its own software assets (e.g., tools, platforms, or other proprietary solutions) as part of AI services portfolio
- Go-to-market alliances with a range of AI technology providers

ADVICE FOR TECHNOLOGY BUYERS

- **Maturity assessment.** Consider your organization's strategy and business objectives before selecting any technology. Just because GenAI and agentic AI currently dominate technology and business conversations does not mean that these capabilities are the right solutions to your business problems, or that your organization is ready to take full advantage of them. A good partner will work with you to understand your goals and challenges, first, and then will help you evaluate whether and when you can expect to realize business benefits from AI investments, considering your available talent, data, and technology resources.
- **AI-fueled business operating plan.** Becoming an AI-fueled organization will require integrating AI into your business strategy, focusing on impactful AI use cases, establishing unified governance, and planning for an AI-augmented workforce. If these are areas where you need support, look for providers with approaches that include business transformation consulting, ROI and business value analysis, responsible AI and governance frameworks, workflow reengineering to support human-AI collaboration, and resources for reskilling and enabling employees. Seek out partners that can translate between technical and business concepts to align stakeholder priorities and expectations and can also communicate effectively with your employees through workshops and change management programs.
- **AI technology operating model.** Cost-effective and secure scaling of AI capabilities across an organization requires a unified technology approach that incorporates fit-for-purpose infrastructure; AI-ready data; a platform integrating data, model, and software development life cycle activities; and AI-infused applications and workflows. If your organization is early in its transition to this type of approach, seek out providers with expertise in AI technology foundations and reference architectures, computational resource optimization, data modernization, platform engineering, and design, prototyping, and industrialization of AI applications. If your AI technology operating model is more established, choose providers that can integrate seamlessly with your environment and internal teams and help you optimize deployment efficiency.
- **Skills.** The range of expertise needed to operate as an AI-fueled organization continues to evolve rapidly. Adoption of agentic AI technologies will inevitably

create new job roles and skills requirements for organizations and services providers alike. Select a partner with skilled resources and platform certifications that fill gaps or enhance your existing AI capabilities, integrate well with your internal teams, and can flex as your skill needs change. Consider partnering with a services provider through an AI center of excellence (COE) construct to gain ongoing access to best practices and recommendations, innovation and R&D resources, on-demand AI talent pools, and managed services and support to move AI solutions from experimentation into production.

- **Innovation and accelerators.** Experimentation will remain a necessary part of the journey to becoming an AI-fueled organization. Services partners can provide structure, organization, and insight to reduce innovation risks and deliver more predictable and tangible outcomes. To accelerate moving from proof of concept to production, consider services vendors that both partner with your chosen technology providers and have codified their own domain knowledge and development methodologies into repeatable blueprints and design patterns. Also, consider the proprietary software assets that service providers may propose as part of their AI services offerings to augment products from your technology provider ecosystem and/or automate business, IT, or operations workflows. While a provider's "prebuilt" solution may only address 60–80% of your organization's needs, it may be a better option than a fully customized solution, especially for more common use cases.
- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for AI services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, technical, industry base, or otherwise.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in Infosys' position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and challenges.

Infosys

After a thorough evaluation of Infosys' strategies and capabilities, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for worldwide AI services.

Infosys' AI services offering is branded as Infosys Topaz and includes the company's services and platform offerings for AI. Infosys Topaz is underpinned by data strategy for maximizing ROI on AI investment and includes four pillars: AI First (set of solutions,

platform, and reimagined services), Client.AI (AI-specific engagements), Services.AI (AI-embedded services), and GenAI-infused platforms. The company's AI services offerings within Client.AI include business consulting, AI Strategy and Value Office, Getting Enterprise Data Ready for AI, data analytics and AI, applied AI, responsible AI, and generative AI, as well as a collection of AI platforms and solution accelerators. Services.AI focuses on app development, app maintenance, app testing, migration and modernization, and package rollout, supported by function-specific platforms on open and closed models. The company is also focusing on AI-enabled automation with its Live Enterprise Automation Platform (LEAP), using GenAI and agentic AI to transform ITOps. Infosys built its own enterprise SLMs and has incorporated them into its platform strategy, including SLMs specific to cybersecurity, banking, ITOps, and code generation, and offers SLM as a service to clients. Agentic Foundry houses Infosys' agentic solutions, with industry-specific solutions for finance healthcare, insurance, retail, communications, and manufacturing, as well as a repository of agents for horizontal skills.

Strengths

IDC considers Infosys' strategies related to client adoption, portfolio, sales and distribution, and marketing to be key strengths. Customers have regard for the company's ability to provide a platform for developing, deploying, and managing AI solutions; secure AI models, APIs, and training data; provide customer service (particularly onsite); and connect them to third-party innovation resources.

Challenges

IDC believes Infosys' delivery model strategy could be improved by incorporating AI agents into a broader range of AI services life cycle areas and a more cohesive approach to platform-based delivery. Infosys could also benefit from a broader range of alliance and growth strategies.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines artificial intelligence (AI) as systems that learn, reason, and self-correct. These systems hypothesize and formulate possible answers based on available evidence, can be trained through the ingestion of vast amounts of content, and automatically adapt and learn from their mistakes and failures. AI systems use a variety of technology components across hardware (e.g., AI servers, AI storage, AI infrastructure as a service, AI network, and AI devices) and software (e.g., AI platforms, AI-enabled applications, and AI system infrastructure software). IDC's definition of AI includes three broad categories of capabilities (generative, predictive, and interpretive).

AI services providers engage with clients to help deploy and use AI systems through business services and IT services:

- **Business services** include AI-related business consulting and business process outsourcing services.
- **IT services** include IT consulting, systems and network implementations, IT outsourcing, application development and management, IT deploy and support, and IT education and training related to AI applications and infrastructure spending.

Underlying data services are a critical component of creating AI systems, serving as the base for initial analysis and learning. Data services are highly specific to the function and process of the AI system and may come from a wide range of sources, both unstructured and structured. These data services include the processes needed to ingest, organize, cleanse, and utilize the data within AI-enabled applications.

For detailed definitions of the markets included within business services and IT services, see *IDC's Worldwide Services Taxonomy, 2025* (IDC #US52282025, March 2025).

LEARN MORE

Related Research

- *IDC's Worldwide Services Taxonomy, 2025* (IDC #US52282025, March 2025)
- *IDC MaturityScope: AI-Fueled Organization 1.0* (IDC #US53209724, February 2025)
- *Artificial Intelligence Services Findings from Enterprise Intelligence Services Survey, 2024* (IDC #US52167625, February 2025)
- *IDC FutureScape: Worldwide Artificial Intelligence and Automation 2025 Predictions* (IDC #US51666724, October 2024)
- *IDC FutureScape: Worldwide Services 2025 Predictions* (IDC #US52634524, October 2024)
- *Market Analysis Perspective: Worldwide Enterprise Intelligence Services, 2024* (IDC #US51423724, September 2024)
- *IDC MarketScope: Worldwide Artificial Intelligence Services 2023 Vendor Assessment* (IDC #US49647023, May 2023)

Synopsis

This IDC study represents a vendor assessment of the worldwide artificial intelligence (AI) services market through the IDC MarketScope model. This assessment discusses both quantitative and qualitative characteristics that explain success in the AI services market. This IDC MarketScope covers a variety of vendors participating in the AI services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"The market for AI services has never been more competitive, offering organizations an abundance of choices when considering external partners to help them successfully pivot from experimentation to adoption at scale," says Jennifer Hamel, senior research director, Enterprise Intelligence Services at IDC. "The 20 vendors assessed in this study

have established themselves as trusted providers across the full life cycle of AI services, with the ability to assist clients both to establish AI-fueled business plans and to transition to AI-ready technology operating models."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC report sales at +1.508.988.7988 or www.idc.com/?modal=contact_repsales for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or web rights.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.