

Generative AI Services

Unlocking and Maximizing the Potential of
Generative AI: A Comparative Analysis of
Service Providers.



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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.



Generative AI Services - 2024

Quadrants	Service Segments									
STRATEGY & CONSULTING	STRATEGY & ROADMAP (Guidance – Assess – Maturity)			TRUSTED & RESPONSIBLE AI (Best Practices – Policy – Regulations)			TALENT & CAPABILITY BUILDING (Expertise – Experience – Engagement)			
	Readiness & Discovery	Business /Tech/ Data Alignment		Explainable AI		Guardrails, Frameworks		Multimodal Talent	Knowledge management	
	AI Blueprint & Roadmap	Business Value and Impact		ESG	Audits	Bias & Fairness		COE & Committees	Workshops & Training	
DEVELOPMENT & DEPLOYMENT	SOLUTION DEVELOPMENT (Design – Build – Integrate)			SOLUTION DEPLOYMENT (Run – Optimize - Scale)			GenAI – PLATFORM (Capability – Functionality - Accelerate)			
	Data Quality	LLM / FM	Model Training	Hyperscaler (AWS, AZURE, GCP)		Tuning & RAG		UI/UX Experience	Security	Prompts
	GANs / VAEs	PoC / MVP	API	LLMOps	Testing	Operationalize	Embeddings / Vector DB	Pre-Built Solutions	Libraries & Templates	
<p>Tools, Accelerators, Middleware</p> <p>Governance & Ethics</p> <p>Industry & Domain Expertise</p> <p>Experience & Engagement</p> <p>Co-Innovation & Collaboration</p>										

Source: Cornerstone



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

Strategy and Consulting Services

Development and Deployment Services

Simplified Illustration Source: ISG 2024

The ISG Provider Lens™ Generative AI Services study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the Global market and Brazil.

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



Strategy and Consulting Services

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**



Development and Deployment Services

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**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following two quadrants on Generative AI Services 2024:

Quadrant	Brazil	Global
Strategy and Consulting Services	✓	✓
Development and Deployment Services	✓	✓



The research phase falls in the period between May and June 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2024.

Milestones	Beginning	End
Survey Launch	June 03, 2024	
Survey Phase	June 03, 2024	July 2, 2024
Sneak Previews	September 2024	
Press Release & Publication	October 2024	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 research agenda

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



Contacts For This Study

Study Sponsor



**Namratha
Darshan**
**Chief Business
Leader**



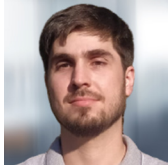
**Gowtham
Sampath**
**Assistant Director
and Principal
Analyst - Global**



**Marcio
Tabach**
**Distinguished
Analyst - Brazil**



**Arjun
Das V**
**Assistant Manager
and Lead Research
Specialist - Global**



**Gabriel
Sobanski**
**Research Analyst -
Brazil**



**Ilamaran
Magesh**
Data Analyst



**Harshita
Bhatt**
Project Manager



ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Loren
Absher

**Director, Americas
Lead – Applied AI
Advisory and Market
Position & Enablement**



Olga
Kupriyanova

Principal Consultant



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

2RP Net	BHS	Course5i	Fujitsu
66 Degrees	BIP	dataRain	GAVB
A3Data	Birlasoft	Dataside	Genpact
Accenture	BJSS	Deal	GFT
adesso SE	BlueShift	Dedalus	Grazitti Interactive
Alexander Thamm	Brasoftware	Deloitte	HARMAN Digital Transformation Solutions
All for One	Brillio	doubleSlash	HCLTech
Analytics8	BRLink	DP6	Hexaware
Ancoris	BRQ	DXC Technology	Hitachi Digital Services
Apexon	Capgemini	Encora	HTC Global Services
Ascendion	CGI	EPAM Systems	IBM
Atos	CI&T	EXL	ilegra
b.telligent	Cigniti	EY	Impetus Technologies
Bain & Company	Cognizant	Factspan	InData Labs
Best.Projects	Compass UOL	Fractal	Indicium



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Indium Software

Inetum

Infogain

Infosys

Inmetrics

Innov8 Digital

IPSense

it-novum

ITC Infotech

Iteris

Jade Global

Keyrus

KPMG

Kumuluz

Kyndryl

LatentView Analytics

Leega

Leeway Hertz

Logicalis

LTIMindtree

MadeinWeb

Marlabs

Marmeladenbaum GmbH

Mastek

MathCo

Mphasis

Mu Sigma

N-iX

Navikenz

Neosoft

NTT DATA

OPITZ CONSULTING

Orange Business

Orion Innovation

Peers

Persistent Systems

pmOne

Publicis Sapient

PwC

Qualitest

Quantiphi

Quinnox

Rackspace Technology

Reply

Rox Partner

SantoDigital

Sauter

Sedin Technologies/Datakulture

Semantix

SG Analytics

Sigmoid

SLK Group

Softtek

Sopra Steria

ST IT Cloud

STATWORX

Stefanini

Straive

Synoptek

T-Systems



Invited Companies

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TCS	Venturus
Tech Mahindra	Version1
ThirdEye Data	Virtusa
Tietoevry	Visionet
Tiger Analytics	Wavestone
TIVIT	Wipro
Tredence	WNS
Trianz	Xebia
UniSoma	Xplain Data GmbH
Unisys	Yssy
UST	Zensar Technologies
V8.Tech	ZS



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, 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](#).

iSG Research™

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iSG

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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.

For more information, visit isg-one.com.



MAY, 2024

REPORT: GENERATIVE AI SERVICES