

# Generative AI Services

A comparative analysis of service providers focused on unlocking and maximizing the potential of GenAI



|                             |    |                               |    |
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Generative AI (GenAI) has emerged as a pivotal technology in 2025, transforming how industries operate, innovate and deliver value. It goes beyond content creation, spanning realistic images, engaging videos, sophisticated code and personalized text, to redefine business processes, accelerate innovation and unlock unprecedented growth opportunities.

Key trends driving GenAI investments in 2025 include:

- Large language models (LLMs) continue to push boundaries with their ability to generate nuanced, context-aware content across diverse domains, while small language models (SLMs) are gaining traction for their precision in niche applications.
- With advancements in multimodal GenAI, businesses can combine text, image, video and audio processing, enabling enhanced decision-making and a hyperpersonalized CX.
- Automation through agentic systems and LLMOps accelerates content generation, analytics and operations, improving efficiency and time to market.

- Increasing focus on adopting responsible AI practices, emphasizing transparency, bias mitigation and regulatory compliance ensures ethical deployment while safeguarding user trust.
- GenAI democratizes innovation by powering applications, including personalized CXs (recommendations and chatbots), enterprise workflows (code generation, software testing and compliance automation), and advancements in fields like drug discovery and materials design, enabling businesses of all sizes to harness its potential.

While GenAI's potential is extensive, businesses must address scalability, cost and strategic alignment. Collaborating with experienced providers ensures tailored, production-ready solutions for comprehensive deployment and sustained success.



## GENERATIVE AI SERVICES - 2025: DEEP VIEW

| Quadrants                                  | Service Segments   |                              |                |  |         |                        |  |                    |                         | Cornerstones  |  |
|--|--|------------------------------|----------------|--|---------|------------------------|--|--------------------|-------------------------|---|--|
| <b>Strategy and Consulting Services</b>    | <b>Strategy and Road Map</b><br>(Guidance – Assess – Maturity) |                              |                | <b>Trusted and Responsible AI</b><br>(Best Practices – Policies – Regulations) |         |                        | <b>Talent and Capability Building</b><br>(Expertise – Experience – Engagement) |                    |                         | <b>Tools, Accelerators, Middleware</b><br><br><b>Governance and Ethics</b><br><br><b>Industry and Domain Expertise</b><br><br><b>Experience and Engagement</b><br><br><b>Coinnovation and Collaboration</b> |  |
|  | Readiness and Discovery  | Business/Tech/Data Alignment |                | Explainable AI   |         | Guardrails, Frameworks |  | Multimodal Talent  | Knowledge Management    |   |  |
|  | AI Blueprint and Road Map                                      | Business Value and Impact    |                | ESG  | Audits  | Bias and Fairness      |  | CoE and Committees | Workshops and Training  |   |  |
| <b>Development and Deployment Services</b> | <b>Solution Development</b><br>(Design – Build – Integrate)    |                              |                | <b>Solution Deployment</b><br>(Run – Optimize – Scale)                         |         |                        | <b>GenAI – Platform</b><br>(Capability – Functionality – Accelerate)           |                    |                         |   |  |
|  | Data Quality   | LLM/FM                       | Model Training | Hyperscaler (AWS, AZURE, Google Cloud)   |         | Tuning and RAG         |  | UI/UX Experience   | Security                | Prompts   |  |
|  | GANs/VAEs  | PoC/MVP                      | API            | LLMOps   | Testing | Operationalize         | Embeddings/vector DB   | Prebuilt Solutions | Libraries and Templates |   |  |



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

Simplified Illustration Source: ISG 2025

**Strategy and Consulting Services**

**Development and Deployment Services**

### Definition

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 the global market and different regional markets, including 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. These services for GenAI equip business leaders with the knowledge and tools needed to make investments and informed decisions.

Strategic services assess use cases to identify those with high ROI potential and business value, aligning them with enterprise goals. Consultants evaluate LLMs, considering factors such as model size, training data, desired outputs and cloud infrastructure selection to optimize computing resources. They also aid in developing governance frameworks, implementing fairness checks and establishing monitoring systems to address bias in AI models. Providers offer strategic guidance on developing training programs, establishing clear communication channels and incorporating best practices aligned with evolving needs and industry standards.

By bridging gaps, these services empower enterprises to navigate GenAI's complexities and achieve sustainable success.

### Eligibility Criteria

1. Demonstrate **domain-specific experience** to deploy **tailored strategy and consulting offerings** to businesses
2. Provide references for **use cases and PoC** implementations with ideation, value creation, and ROI measurement frameworks and approach details
3. Exhibit **proven knowledge of LLMs, cloud platforms, data science** and best practices for **model training, deployment and integration**
4. **Showcase use cases and PoC** that have transitioned from **strategy and consulting to implementation**
5. Possess a **team** with strong **business and industry acumen**
6. Demonstrate **partnerships** with technology providers, academia and startup ecosystems
7. Showcase investments in **intellectual property accelerators, tools, frameworks and platforms**
8. **Develop and implement ethical frameworks for responsible AI use**, prioritizing data quality, **fairness, transparency and accountability** while mitigating bias and hallucination
9. Facilitate **human-in-the-loop strategies** and ethical standards **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 in the entire process, from creating PoCs to producing GenAI solutions while providing monitoring and management support.

Providers should assist in implementing cost-effective cloud infrastructure tailored to industry-specific needs to optimize resource allocation for efficient model training and deployment while minimizing time and costs. They play a crucial role in selecting the right platforms and tools for data preprocessing, model training and experimentation. They should also offer support for fine-tuning pretrained models and facilitating their integration and deployment for specific use cases. Establishing LLMOps practices for monitoring and retraining models is vital for optimizing performance. In addition, providers must implement security protocols encompassing encryption, access control and compliance with industry-specific data privacy regulations.

By partnering with providers to reduce costs and management efforts, enterprises can focus on core business while leveraging GenAI's potentials.

### Eligibility Criteria

1. Demonstrate a deep understanding of cloud platforms and resource allocation for training and running models based on use cases
2. Optimize training for utilizing compute resources efficiently in minimal time
3. Fine-tune pretrained models and SLMs for industry-specific requirements and understand the nuances of domain data
4. Build 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 the performance of fine-tuned models
6. Have a deep understanding of infrastructure requirements for deploying GenAI models, including containerization and scalable server setups
7. Establish strong security practices for model deployment, data transmission and access controls
8. Showcase advanced, impactful use cases and solution demonstrations that highlight expertise in developing and deploying GenAI solutions aligned with enterprise objectives
9. Showcase capability and use cases in building and deploying multimodal applications



## Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following two quadrants on Generative AI Services 2025:

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





The research phase falls in the period between March and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2025.

| Milestones                  | Beginning     | End            |
|-----------------------------|---------------|----------------|
| Survey Launch               | March 5, 2025 |                |
| Survey Phase                | March 5, 2025 | June 13, 2025  |
| Sneak Preview               | August 2025   | September 2025 |
| Press Release & Publication | October 2025  |                |

The collection of client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) as 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™ 2025 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!

**Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Generative AI Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

**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](mailto:ISG.star@isg-one.com)



**ISG Star of Excellence**

The ISG Provider Lens™ 2025 – 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:**

Namratha Dharshan

**Lead Authors:**

Gowtham Kumar Sampath, Marcio Tabach and Hemangi Patel

**Editor:**

Padma Mohapatra

**Research Analysts:**

Arjun Das V and Gabriel Sobanski

**Data Analyst:**

Ilamaran Magesh

**Quality & Consistency Advisors:**

Loren Absher and Olga Kupriyanova

**Project Manager:**

Sukanya Nair and Sibin Varghese

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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. The data collected for this report represents information that ISG believes to be current as of March 2025, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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



## Contacts For This Study

### Study Sponsor



**Namratha  
Dharshan**  
**Chief Business  
Leader**



**Gowtham  
Kumar Sampath**  
**Assistant Director  
and Principal Analyst  
– Global**



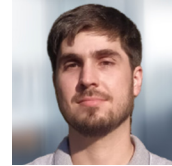
**Marcio  
Tabach**  
**Distinguished  
Analyst – Brazil**



**Hemangi  
Patel**  
**Senior Manager and  
Principal Analyst –  
Global**



**Arjun  
Das V**  
**Assistant Manager  
& Lead Research  
Specialist – Global**



**Gabriel  
Sobanski**  
**Research Analyst –  
Brazil**



**Ilamaran  
Magesh**  
**Senior Data Analyst**



**Sabin  
Varghese**  
**Senior Program  
Manager**



**Sukanya  
Nair**  
**Senior 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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT 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**



Olga  
Kupriyanova

**Principal Consultant, AI  
& Data Engineering**



## 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.**

\* Rated in previous iteration

66Degrees\*

A3Data\*

Accenture\*

adesso SE

Agilisium

Alexander Thamm\*

All for One Group\*

Analytics8\*

Ancoris\*

Apexon\*

Aptus Data Labs

Ascendion\*

Atos

b.telligent

Bain & Company

Best.Projects

BHS

BIP

Birlasoft\*

BJSS

BlueShift\*

Brasoftware\*

Brillio\*

BRLink\*

BRQ\*

Captgemini\*

CGI\*

CI&T\*

Cigniti

Coforge\*

Cognizant\*

Compass UOL\*

Computacenter

C5i

Cyient\*

dataRain\*

Dataside

Deal\*

Dedalus\*

Deloitte\*

doubleSlash

DP6

DXC Technology\*

Encora\*

EPAM Systems\*

EXL\*

EY\*

E-zest

Factspan\*

Firstsource

Flexa Cloud

Fractal\*

Fujitsu\*

GAVB

Ganit Inc

Genpact\*

GFT

GlobalLogic\*

Grazitti Interactive

Happiest Minds\*



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\* Rated in previous iteration

HARMAN\*

HCLTech\*

Hexaware\*

HTC Global Services\*

IBM\*

ilegra

Impetus Technologies\*

InData Labs\*

Indicium

Indium\*

Inetum

Infogain

Infosys\*

InfoVision\*

Inmetrics\*

Innovet Digital\*

IPSense

ITC Infotech\*

Iteris/Globant

it-novum

Jade Global

Keyrus

KPMG

KPMG Lighthouse

Kumulus\*

Kyndryl\*

LatentView Analytics

Leega

Leeway Hertz\*

Logicalis\*

LTIMindtree\*

MadeinWeb\*

Marlabs

Marmeladenbaum GmbH

Mastek\*

MathCo\*

Microland

Movate\*

Mphasis\*

MSRcosmos

Mu Sigma

Nava

Navikenz\*

Neosoft

Network Science\*

N-iX\*

NTT DATA\*

OPITZ CONSULTING

Orange Business\*

Orion Innovation\*

Peers\*

Persistent Systems\*

pmOne

Publicis Sapient

PwC

Qualitest

Quantiphi\*

Quinnox

Rackspace Technology\*

Randstad Digital\*



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\* Rated in previous iteration

|                                |                  |                     |
|--------------------------------|------------------|---------------------|
| Reply                          | Straive          | V8.Tech*            |
| Rox Partner                    | Synoptek         | Venturus            |
| Sagility*                      | TCS*             | Version 1*          |
| SantoDigital*                  | Tech Mahindra*   | Virtusa*            |
| Sauter Digital*                | ThirdEye Data    | Visionet            |
| Sedin Technologies/Datakulture | Tietoevry*       | Wavestone           |
| Semantix                       | Tiger Analytics* | Wipro*              |
| SG Analytics*                  | TIVIT*           | WNS-Vuram*          |
| Sigmoid*                       | Tredence*        | Xebia               |
| SLK Group*                     | Trianz*          | Xoriant*            |
| Softtek                        | Trigent*         | Xplain Data GmbH    |
| Sopra Steria*                  | T-Systems*       | Yssy*               |
| ST IT Cloud*                   | UniSoma          | Zensar Technologies |
| STATWORX                       | Unisys*          | ZS Associates       |
| Stefanini*                     | UST*             |                     |





## 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™

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](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](https://research.isg-one.com).

## ISG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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





**MARCH, 2025**



**BROCHURE: GENERATIVE AI SERVICES**