iSG Provider Lens™

Intelligent Automation Services

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | MARCH 2025 | U.S. AND EUROPE

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As of 2025, intelligent automation has evolved into a strategic capability driven by generative AI (GenAI) and agentic AI. GenAI's integration with automation allows analysis and contextualization of complex data while generating predictive insights. Global system integrators are exploring viable use cases of agentic AI systems embedded with contextual understanding, adaptability and reinforced learning for autonomous decision-making within automated workflows.
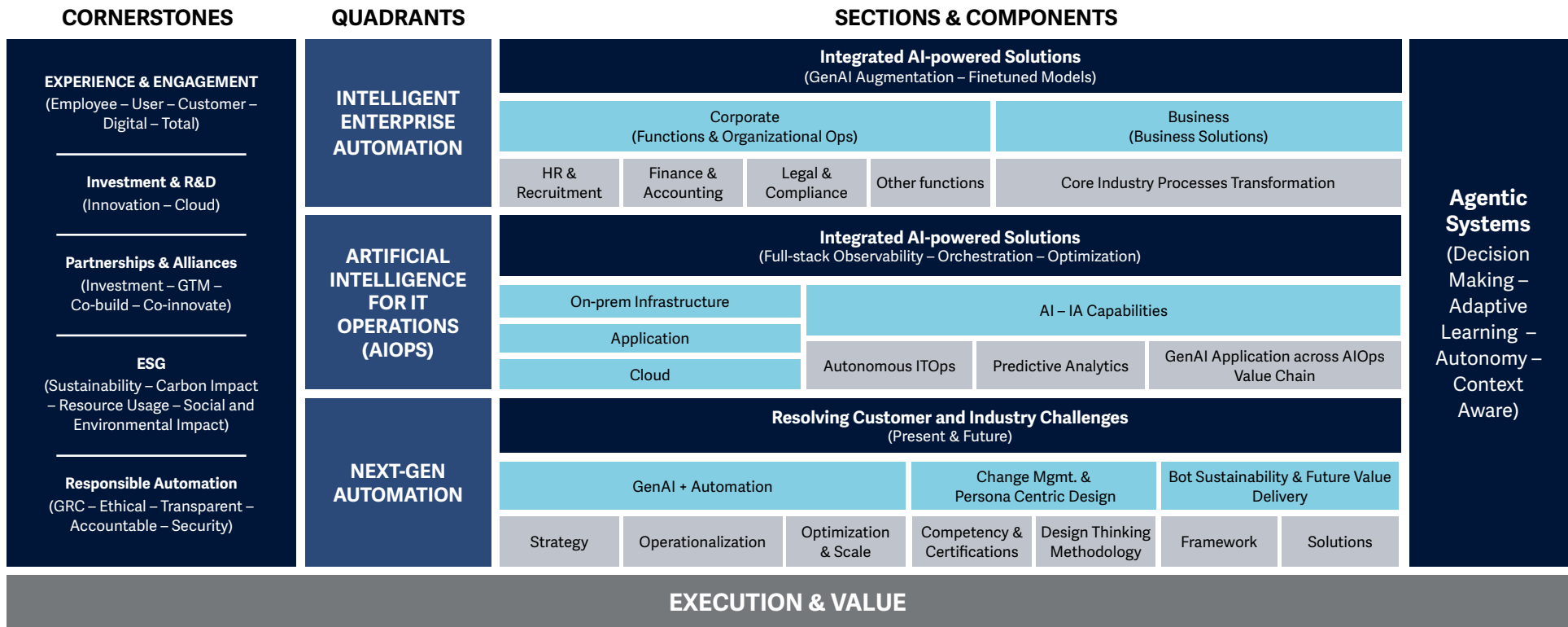
Clients are pivoting from siloed automation projects and point solutions to industry-specific process automation. They seek scalable and autonomous processes that can be transformed into productized services for enterprise-wide deployment. As the intelligent automation landscape evolves, full-stack observability, data democratization and enterprise process orchestration will be critical for building a competitive automation portfolio.

Enterprises comprehensively evaluate automation, tracking key metrics at regular checkpoints to support iterative improvements for enhanced business outcomes and experiences (CX, UX and EX). Low-code application platforms (LCAPs) also democratize automation by empowering users with intuitive interfaces. The increasing demand for skilled professionals in the intelligent automation domain has prompted global system integrators (GSI) to invest in talent transformation programs, upskilling their workforce to meet the market's evolving needs.

Security integration and data privacy are gaining significant momentum, with AI ethics as a cornerstone, particularly due to the influence of LLMs and agentic AI systems. Moreover, the focus on green and responsible automation has intensified, emphasizing the development of sustainable automation practices.

INTELLIGENT AUTOMATION SERVICES – 2025: DEEP VIEW

CORNERSTONES

EXPERIENCE & ENGAGEMENT
(Employee – User – Customer – Digital – Total)

Investment & R&D
(Innovation – Cloud)

Partnerships & Alliances
(Investment – GTM – Co-build – Co-innovate)

ESG
(Sustainability – Carbon Impact – Resource Usage – Social and Environmental Impact)

Responsible Automation
(GRC – Ethical – Transparent – Accountable – Security)

QUADRANTS

INTELLIGENT ENTERPRISE AUTOMATION

ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOPS)

NEXT-GEN AUTOMATION

SECTIONS & COMPONENTS

Integrated AI-powered Solutions
(GenAI Augmentation – Finetuned Models)

Corporate (Functions & Organizational Ops)				Business (Business Solutions)
HR & Recruitment	Finance & Accounting	Legal & Compliance	Other functions	Core Industry Processes Transformation

Integrated AI-powered Solutions
(Full-stack Observability – Orchestration – Optimization)

On-prem Infrastructure	AI – IA Capabilities		
Application	Autonomous ITOps	Predictive Analytics	GenAI Application across AIOps Value Chain
Cloud			

Resolving Customer and Industry Challenges
(Present & Future)

GenAI + Automation			Change Mgmt. & Persona Centric Design		Bot Sustainability & Future Value Delivery	
Strategy	Operationalization	Optimization & Scale	Competency & Certifications	Design Thinking Methodology	Framework	Solutions

Agentic Systems
(Decision Making – Adaptive Learning – Autonomy – Context Aware)

EXECUTION & VALUE

The study examines GSI's intelligent automation ability to drive **digital transformation** across **IT, business services and corporate functions**.
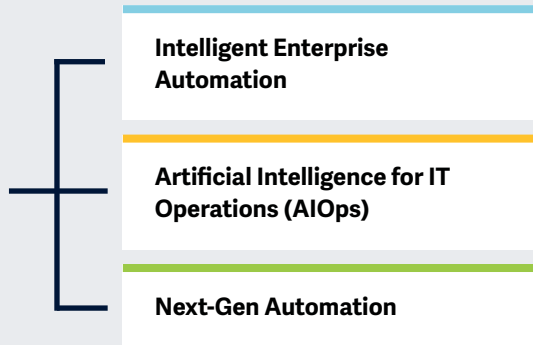
Simplified Illustration Source: ISG 2025

Intelligent Enterprise Automation

Artificial Intelligence for IT Operations (AIOps)

Next-Gen Automation

Definition

The ISG Provider Lens™ Intelligent Automation 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 U.S. and Europe

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.

Intelligent Enterprise Automation

Definition

This quadrant evaluates service providers that design, develop and deploy intelligent automation solutions using proprietary[1] platforms and AI-powered tools and frameworks across business and organizational portfolios. This quadrant also analyzes providers' ability to offer associated services, such as consulting, advisory and implementation, and ongoing support for proprietary offerings that enable enterprises to augment their respective workforces' capabilities. The solutions can be implemented in any area of an enterprise organization, thus expanding the scope of automation from business services (industry verticals) to internal corporate functions such as finance and accounting (F&A), HR, legal and compliance, and supply chain operations. Intelligent automation solutions enhance enterprises' business operations through advanced analytics and AI capabilities such as computer vision, ML, deep learning and NLP.

The integration of fine-tuned LLMs and SLMs further transforms enterprise processes, while GenAI enhances process understanding by providing insightful contextualization of outcomes.

Note1: Proprietary solutions are developed internally and comprise products and services that might include open-source components or commercially licensed software but are not predominantly tied to a specific vendor.

Eligibility Criteria

1. Offer **proprietary automation AI platforms and solutions** specific to industries and functions and perpetual support for end-to-end business and corporate function transformation

2. Offer support **integration with various enterprise applications** such as CRM and ERP systems

3. Facilitate **automation with strong advisory abilities** for internal buy-in and guidance throughout the business transformation journey

4. Offer **innovative APIs, multitenancy** and secure platform deployment

5. Demonstrate experience in consulting, developing and deploying **industry-focused and function-specific automation solutions**

6. Showcase existing **GenAI integrations** across various enterprise use cases

7. Demonstrate **partnerships** (with hyperscalers and ISVs) and **investments in R&D** to advance future GenAI development

Artificial Intelligence for IT Operations (AIOps)

Definition

This quadrant analyzes IT service providers and GSIs offering proprietary AIOps solutions, platforms and frameworks that help enterprises monitor a distributed IT infrastructure, understand IT behavior under dynamic conditions, and orchestrate and optimize it. AIOps leverages AI and ML tools, predictive analytics and knowledge automation using GenAI and other advanced solutions to facilitate enterprises' multicloud and hybrid cloud workload transformation. It also offers real-time insights, event correlation and telemetry from configuration items across cloud and hosted infrastructure. Practicing AIOps helps companies detect tech events that adversely impact the business. Such solutions and frameworks redefine the IT operations model by combining conversational AI, document intelligence and process mining components with automation, providing complete visibility into an enterprise's IT landscape. There is an increased focus on GenAI applications across the AIOps value chain and autonomous knowledge processing to aid algorithms in improving anomaly detection, full-stack observability, predictive maintenance, log analysis and event correlation.

Note: This quadrant focuses on proprietary solutions (built in-house, potentially using open-source or commercially licensed components but not tied to a specific component vendor) for autonomous multicloud workload operation. These solutions leverage AI, ML and big data developed by IT service providers to anonymously support an enterprise's multicloud workload operation.

Eligibility Criteria

1. Offer a **custom-built solution** to manage and administer IT infrastructure, applications and CloudOps

2. Provide **consolidated events and take predefined intelligent actions**, including resolution, assignment and related subsequent steps

3. Demonstrate **the active utilization of GenAI solutions** within existing IT operations

4. Showcase a **detailed GenAI strategy and road map**, emphasizing partnerships with hyperscalers or ISVs

5. Deliver **scalable, real-time insights and proactive analysis** to enhance IT visibility

6. Leverage **AI and ML** for automated service resilience and data-driven recommendations

7. Offer flexible **data visualization**, support **data injection from multiple sources**, enable **automated pattern discovery and provide innovative APIs** for seamless multicloud integration

8. Offer holistic solutions that act as a **smart orchestration engine for workflow creation**, with a nearly **zero-touch** or **one-touch** approach

Next-Gen Automation

Definition

This quadrant assesses service providers' approaches to building a next-gen sustainable automation road map, covering innovation, organizational adoption, talent strategy and bot development standards using the latest technologies and frameworks. It also assesses providers' capacity to support organizational adaptation through change management, training and technology upgrades that are aligned with platform advancements. Intelligent automation emerges as a key strategy for achieving efficiency within the evolving ESG landscape by optimizing resources and streamlining reporting.

GenAI has intensified the focus on ethical AI-powered automation practices governed by automation CoEs to protect enterprise data. Providers in this quadrant must demonstrate capabilities to build automation solutions and have platform certifications, functional knowledge, industry expertise and a clear strategy for resource upskilling and cross-skilling via partner training programs.

They should adopt user or persona-centric design principles to differentiate themselves with customized workflows. As new forms of GenAI emerge, such as one-bit models, energy-efficient LLMs and SLMs, and vertical and functional RAGs and LAMs, providers must ensure they offer relevant and innovative solutions for automation use cases.

Eligibility Criteria

1. Facilitate a **seamless transition across users and stakeholders, ensuring external (clients) and internal (employees)** entities are well managed and educated on automation

2. Demonstrate the ability to build **future-ready solutions, leveraging persona-centric and the latest technologies**

3. Provide operating models that adhere **to industry standards and data protection regulations**

4. Focus on a business-centric automation approach, encompassing **low-code/no-code (LCNC) development offerings**

5. Ability to drive implementation and integration capabilities **using innovative technologies**

6. Focus on **the development of new skills** that maximize automation benefits

7. Use **frameworks, methodologies and reference architecture to develop bots** (DevOps, CI/CD and LCNC)

8. Demonstrate the ability to **design and implement GenAI across business and technology domains** by highlighting a comprehensive GenAI strategy, operationalization and scaling initiatives, existing partnerships (including those with hyperscalers and ISVs), R&D investments and a road map for future applications and development

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Intelligent Automation Services 2025:

Quadrant	U.S.	Europe
Intelligent Enterprise Automation	✔	✔
Artificial Intelligence for IT Operations (AIOps)	✔	✔
Next-Gen Automation	✔	✔

The research phase falls in the period between March and October 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2026.

Milestones	Beginning	End
Survey Launch	March 5, 2025	
Survey Phase	March 5, 2025	August 08, 2025
Sneak Preview	November 2025	December 2025
Press Release & Publication	January 2026	

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 Intelligent Automation 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

ISG Star of Excellence

The ISG Provider Lens™ 2025 – Intelligent Automation 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.

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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.

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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

Wayne
Butterfield

Partner

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

Accenture*	DXC Technology*	IBM*	Persistent Systems*
All for One Group	Engineering Group	IGT Solutions*	PwC*
Arvato Systems*	Espire Infolabs*	Infolabs	Quantiphi
Aspire Systems*	Eviden (Atos Group)*	Infosys*	Quinnox
Axians*	Exela Technologies	Innover Digital*	Reply
Birlasoft*	EXL*	ITC Infotech*	Softtek
CANCOM	EY*	KPMG*	SoftwareOne
Capgemini*	Fujitsu*	Kyndryl*	Sonata Software*
Capita	GAVS*	LTIMindtree*	Sopra Steria
CGI*	Genpact*	Marlabs*	Sutherland*
Coforge*	GFT	Microland*	TCS*
Cognizant*	Globant	Movate*	Tech Mahindra*
DATAGROUP*	HCLTech*	Mphasis*	Teleperformance
Datamatics*	Hexaware*	NTT DATA*	Tietoevry Tech Services*
Deloitte*	Hitachi Vantara	Orange Business	T-Systems*

Invited Companies

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* Rated in previous iteration

Unisys

UST*

Virtusa

Wipro*

WNS-Vuram*

Xceedance*

Zensar Technologies*

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.

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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.

ISG Provider Lens™

MARCH, 2025

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BROCHURE: INTELLIGENT AUTOMATION SERVICES