

Intelligent Automation Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Atos

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Report Author: Mark Purdy

Agentic AI automation could usher in a new era of process excellence

The intelligent automation landscape in Europe continues to evolve rapidly in technological sophistication, competitive intensity and the pace of service and solution development. Within the intelligent automation space, several key trends can be identified:

The rise of agentic automation: While generative AI (GenAI) still plays a significant role in intelligent enterprise automation (IEA) services and solutions development, provider attention has now shifted toward the emergence of AI agents and multiagent models for new and better forms of automation. Most leading players have invested heavily in AI agents, AI-powered bots that have a high degree of contextual awareness and that can act autonomously and proactively to carry out complex workflows and business actions. Although providers have so far focused on single-agent models, some

have introduced multiagent models where agents with specialized roles such as data gathering, workflow automation and customer communications work together to achieve particular business goals or outcomes. Agentic AI enables enterprises to move beyond the piecemeal, incremental RPA of old toward a much more streamlined, end-to-end automation of enterprise business functions. While agentic-powered IA is still in its early days, provider agentic AI-powered solutions are now moving beyond proofs of concept and pilots into production-ready applications. Agentic IA automation use cases have mushroomed, with horizontal use cases now observed in areas such as zero-touch AIOps, ITSM, customer service interactions, HR support and invoice processing.

Intelligent automation morphing into process excellence: Businesses are ultimately concerned with process excellence; they aim to achieve end-to-end efficient and accurate processes that will optimize not just ROI but also customer, user and employee experiences. More and more providers now emphasize intelligent automation as just one

Agentic AI brings
the goal of
autonomous and
proactive IEA a
step closer to reality.



part of an overall approach to operational or process excellence, combining AI, automation, business process management tools, lean management principles and process expertise in a structured way. Data-driven discovery tools such as process mining can shed light on hidden or inefficient processes, paving the way for automation or restructuring of work. Providers also increasingly emphasize process management platforms that aim to orchestrate the activities of AI agents, RPA tools and human workers to achieve process excellence.

Sovereign AI becomes sovereign IA: For various regulatory, geopolitical and data privacy and security reasons, enterprises in Europe are seeking IEA solutions that are delivered within a sovereign environment. While lacking a precise definition, sovereign IA solutions typically involve extra controls on data residency and the operational environment where data for intelligent automation services is stored or processed. These solutions may involve using an enterprise's private cloud or a provider's sovereign cloud platform (if they have one) in Europe.

From LLMs to SLMs: Large-language models (LLMs) serve as the brains for most GenAI and agentic AI applications. Although providers can choose from a large array of open-source LLMs such as OpenAI, Anthropic, Cohere and Meta, to name but a few, some consider the LLM market somewhat commoditized. They find that the choice of LLM for automation as less of a competitive differentiator for IEA solution providers. Consequently, provider attention is now pivoting to small language models (SLMs), which use LLM capabilities but enrich these with enterprise- or domain-specific contextual data. SLMs not only avoid the hallucination issues that affect LLMs but also enable enterprises to maintain data and policy compliance control over their data and automation processes.

Responsible AI looms large: With the rise of agentic AI systems with a high degree of autonomy in decision-making and action, the role of responsible AI in IA has taken on a new level of importance for enterprises. How agentic IA systems make decisions, the accuracy of such systems, the role of humans and the consequences of mistakes are

questions that loom large for enterprises and service providers. Most leading providers, therefore, strongly emphasize their responsible AI tools and credentials, focusing on governance frameworks for ethical AI adoption and usage, policy and regulatory compliance guardrails, and tools and frameworks to detect bias and improve the explainability of AI decision-making.

Spotlight on experiences: In the past, RPA projects often had limited scope and lifecycle and usually aimed at reducing costs and giving a quick boost to ROI. With the many possibilities now opening up with agentic AI, enterprises recognize that IEA can be a powerful driver for organizational efficiency and top-line growth. IEA is now seen as a powerful way to improve CX, using AI-powered customer agents, recommendation engines and workflow orchestrators. AI agents can organize travel bookings, rapidly process insurance claims, onboard new banking customers, or look for signs of customer churn and proactively offer upgrades and promotions. They can autonomously field customer queries within contact centers or rapidly summon

customer information and recommendations for human agents.

Greater focus on human-machine interactions:

Agentic AI-powered automation promises a new path toward human-machine interaction, one in which hybrid-human teams work in tandem to deliver business outcomes. However, the path toward these new teams will likely be rocky, requiring training, new roles and new ways of working. Effective change management will be critical. Most leading providers, therefore, heavily emphasize their change management and user-centric design capabilities, offering structured methodologies, frameworks and communication methods. Some of these rely on top-down communications, yet others seek to instill change at the grass roots level, often through nudge-based incentives for behavioral change and adoption of new technologies.

The European market for IA solutions and services remains buoyant, with most providers reporting steady or increasing demand. Enterprises in Europe are generally more risk-averse and cautious (than their U.S. counterparts) when investing in IEA services. The demand for IEA in Europe is heavily driven



by factors such as regulatory compliance, sustainability, ESG, green AI and a desire for sovereign data controls. Agentic AI-led automation is also seeing growing demand, with more projects moving from pilot to scaling phases. The demand for IEA is relatively broad-based by industry, including public services, manufacturing, energy, banking, healthcare and utilities. Enterprises in Europe often prefer more flexible pricing for IEA projects, with pay-as-you-go models gaining popularity. A consistent theme noted by providers is that European enterprises generally favor a strong compliance and ethics-driven approach to IEA, coupled with an emphasis on a human-centric approach to automation.

IEA demand in Europe is heavily driven by factors such as regulatory compliance, sustainability, ESG, green AI and a desire for sovereign data controls.





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Accenture	Leader	Leader	Leader
Arvato Systems	Contender	Not In	Contender
Atos	Leader	Leader	Leader
Axians	Not In	Contender	Not In
Birlasoft	Product Challenger	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader
CGI	Product Challenger	Contender	Contender
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Product Challenger	Leader





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
DATAGROUP	Not In	Product Challenger	Not In
Datamatics	Product Challenger	Not In	Contender
Deloitte	Not In	Not In	Product Challenger
DXC Technology	Product Challenger	Leader	Product Challenger
Espire Infolabs	Contender	Not In	Contender
EXL	Leader	Product Challenger	Rising Star ★
EY	Product Challenger	Not In	Product Challenger
Firstsource	Not In	Not In	Product Challenger
Fujitsu	Contender	Not In	Product Challenger





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Genpact	Leader	Product Challenger	Product Challenger
Happiest Minds	Contender	Not In	Not In
HCLTech	Leader	Leader	Product Challenger
Hexaware	Leader	Leader	Not In
IBM	Market Challenger	Market Challenger	Not In
IGT Solutions	Not In	Not In	Contender
Infosys	Leader	Leader	Leader
ITC Infotech	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Not In	Product Challenger	Not In





	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
LTIMindtree	Product Challenger	Product Challenger	Product Challenger
Marlabs	Contender	Not In	Not In
Microland	Product Challenger	Product Challenger	Not In
Mphasis	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Market Challenger	Market Challenger	Product Challenger
Persistent Systems	Rising Star ★	Product Challenger	Product Challenger
PwC	Product Challenger	Not In	Product Challenger
Sutherland	Product Challenger	Not In	Product Challenger
TCS	Leader	Leader	Product Challenger





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Tech Mahindra	Product Challenger	Leader	Product Challenger
T-Systems	Leader	Leader	Leader
UST	Product Challenger	Product Challenger	Product Challenger
Visionet	Product Challenger	Contender	Not In
Vivicta	Leader	Leader	Leader
Wipro	Leader	Leader	Product Challenger
WNS-Vuram	Leader	Not In	Leader



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

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.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services: Intelligent Enterprise Automation, Artificial Intelligence for IT Operations (AIOps) and Next-Gen Automation.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the Europe 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.

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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

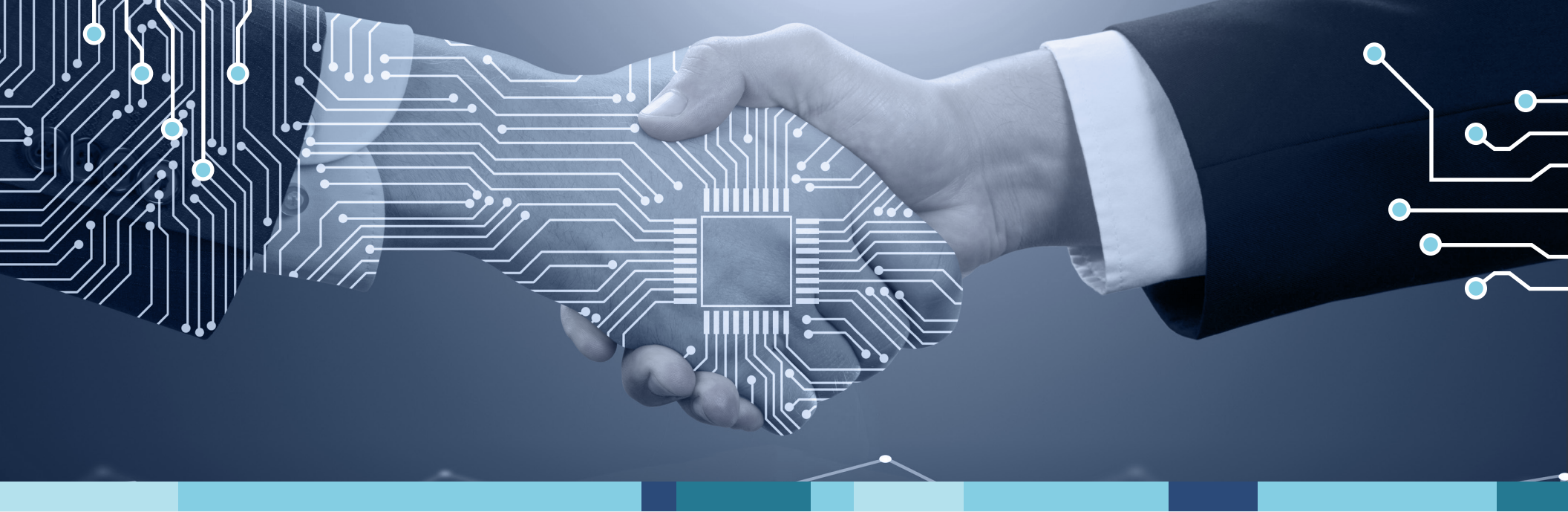
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

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.





Intelligent Enterprise Automation

Who Should Read This Section

This report is valuable for providers offering intelligent enterprise automation (IEA) services in Europe 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. IEA is evolving rapidly, driven by generative AI (GenAI), agentic AI, enhanced security and outcome-focused partnerships, to address specific challenges and adapt to dynamic market demands.

Strategy professionals

should read this report to understand how IEA providers harness capabilities to deliver targeted benefits. Strategists can identify opportunities for competitive differentiation, evaluate how automation can unlock new revenue streams or operating models, and ensure IEA initiatives align with organizations' long-term strategic objectives and market positioning.

Digital professionals

should examine this report to understand the alignment of IEA solutions with their digital transformation goals and compare various service providers' offerings. The report evaluates providers' platform architectures and integration capabilities. Such information allows digital leaders to select partners offering solutions that seamlessly integrate with their existing digital ecosystem for measurable transformation outcomes.

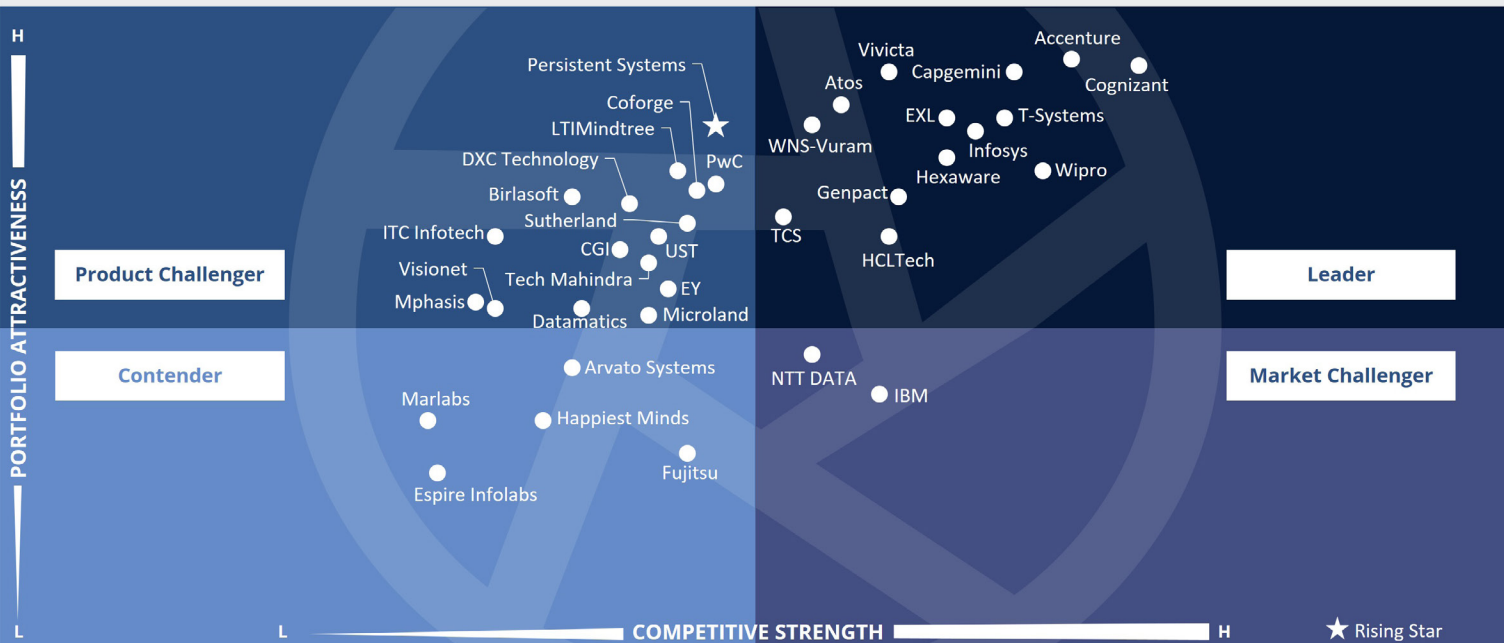
Technology professionals

should read this report to understand how IEA providers integrate emerging technologies and features into enterprises' proprietary solutions, enhancing their competitive position. The report explores how providers integrate technologies such as AI, ML and advanced analytics into their platforms, empowering the technology teams to assess potential solutions' technical feasibility, scalability and security.

Procurement professionals

should read this report to better understand the current landscape of IEA service providers operating in Europe, allowing procurement teams to conduct more effective market scans, structure well-informed RFI/RFP processes, benchmark pricing models and SLAs, and negotiate advantageous contracts by understanding the capabilities of potential automation partners.





This quadrant assesses providers that offer **intelligent enterprise automation** services for clients in Europe. Providers have rapidly enhanced their **agentic IA** capabilities, scaling **industry and horizontal** use cases.

Mark Purdy



Intelligent Enterprise Automation

Definition

This quadrant evaluates service providers that design, develop and deploy intelligent automation solutions using proprietary 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



Intelligent Enterprise Automation

Observations

The IEA quadrant has seen significant innovation and market change over the last year. ISG has identified several key trends. The first and the most important one is the rapid emergence of agentic AI and its infusion across product, solution and service portfolios. All Leaders have invested in agentic AI capabilities, talent, tools and assets, and many have developed industry-specific and functional use cases that are already in production. Second, LLM-driven generative AI solutions remain important, although providers have increased their use of small language models for specific enterprise use cases. Third, leading providers are scaling and, to some extent, reconfiguring their external ecosystems of technology and software providers. While the major automation product platforms stay crucial, providers are forging strong partnerships with hyperscalers and major enterprise software providers such as Salesforce, ServiceNow and Pega. Fourth, leading providers in Europe emphasize their sovereign IA capabilities, especially for regulated industries and sectors. Fifth, Leaders are becoming increasingly acquisitive, acquiring

smaller, specialist providers to fill particular niches in their portfolio offerings and boost technical talent where required.

From the 43 companies assessed for this study, 37 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture has recently introduced a new AI Agent Builder as part of the Accenture AI Refinery™, offering more than 50 industry-specific agents.

Atos

Atos leads with a distinct business-persona based approach to IEA, molded according to the needs of business users. Its Polaris orchestration platform combines agentic AI and GenAI features in a single platform.

Capgemini

Capgemini has rapidly scaled its investments in GenAI- and agentic AI-driven IEA solutions. It offers an extensive catalog of AI agents covering various business functions.

cognizant

Cognizant leads with an IEA strategy shaped around value-based, industry consulting. To this end, it has invested heavily in bolstering its AI and automation talent through extensive training programs.

EXL

EXL has ramped up its agentic AI capabilities, with significant strengths in both horizontal AI applications and agentic AI for major enterprise software platforms.



Genpact has invested significantly in infusing agentic AI capabilities across its IEA service and solution portfolio. Its IEA approach centers around process excellence and automation orchestration.

HCLTech

HCLTech continues to invest heavily in its AIForce.BizOps platform, offering a range of automation solutions for infrastructure and business processes. It has developed an extensive catalog of horizontal and vertical agentic AI use cases.

HEXAWARE

In July 2025, **Hexaware** acquired SMC Squared, a specialist in building global capability centers. In May 2024, it acquired Softcrylic, a specialist in data strategy and marketing technology. These acquisitions will bolster Hexaware's capabilities in IA-powered functional and process excellence.

Infosys

Infosys has made a string of recent acquisitions relevant to the intelligent automation space. Notably, it acquired in-tech, a German digital automotive and e-mobility firm, in April 2024.



Intelligent Enterprise Automation



TCS is expanding WisdomNext™, its GenAI aggregation platform that allows clients to benchmark and orchestrate models across clouds through a single interface. In 2025, it added autonomous orchestration and guardrails, strengthening its leadership in safe enterprise-scale GenAI.

T Systems

T-Systems showcases delivery flexibility (IAAS, PAAS and SAAS) and its ability to construct IEA solutions within sovereign cloud/AI environments.



Vivicta (previously known as TietoEvry Tech Services) was spun out from its parent company, TietoEvry, in March 2025 and acquired by Agilitas Private Equity.



Wipro continues to invest in its Lab45 platform, expanding its catalog of GenAI use cases for automation. Its ai360 ecosystem integrates automation, data, cybersecurity and engineering, positioning Wipro as a full-spectrum service provider.

WNS

WNS-Vuram has made several acquisitions over the last 24 months, including Kip.ai, an AI and data science specialist, and The Smart Cube, an AI-led research and data intelligence provider.



Persistent Systems, a Rising Star in Europe, has invested significantly in agent AI capabilities as part of its IEA suite of services.



Atos



“Atos is a Leader in Intelligent Enterprise Automation in Europe, demonstrating an impressive combination of agentic AI and GenAI tools and features in its Polaris orchestration platform.”

Mark Purdy

Overview

Atos is headquartered in Bezons, France. It has more than 74,000 employees across 68 countries. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos provides a broad range of IEA services and solutions through its Polaris AI platform for development, testing, maintenance and knowledge management as well as many industry solutions. It also offers intelligent automation-related business and industry consulting services. Atos has a significant IEA services business in Europe, as well as a large cohort of automation professionals.

Strengths

Ecosystem range and depth: Atos has forged powerful partnerships in the intelligent automation space, including all major hyperscalers, automation platform providers (such as UiPath and Blue Prism), observability platforms (e.g., Dynatrace) and enterprise software (e.g., ServiceNow). Thus, it is well-positioned to offer clients the right mix of proprietary and home-grown automation solutions.

Persona-based approach: Business personas play a key role in Atos's automation approach, with its solutions and services carefully tailored to the needs of different industries, for example, IT engineers or customer agents within contact centers, claims service representative in insurance.

IP-rich approach: Atos has invested significantly in building a strong IP-led approach to its IEA offerings. It has a large suite of IEA tools and accelerators, notably its Polaris orchestration platform, which unifies agentic AI and GenAI tools in one platform. The Polaris platform can pivot across a range of LLMs, including OpenAI, LLaMA, Claude, Amazon Bedrock and Google's Gemini. It incorporates an AI agent, Design Studio, for building AI agents and tools for integrating third-party AI agents. Specific agent roles include market researcher, IT support, legal contracts analyst and business process assistant.

Caution

Atos has made impressive strides in upgrading its IEA capabilities through the Polaris platform. It must, however, maintain the pace of its product and service development, especially in the agentic AI services and solutions space.





Artificial Intelligence for IT Operations (AIOps)

Who Should Read This Section

This report is valuable for service providers offering AIOps in Europe 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. Global system integrators drive autonomous IT operations, improve observability across IT environments, automate incident resolution with self-healing capabilities, integrate GenAI through the AIOps value chain, and reinforce data security and compliance measures.

Strategy professionals

should read this report to grasp the positioning and capabilities of AIOps providers, enhancing technical integration and reliability. The report details how different AIOps solutions and services contribute to the overall system reliability and seamless technical integration, which form the basis for maintaining a competitive advantage.

Digital professionals

should review this report to understand how AIOps providers align with intelligent automation initiatives and to compare these providers. These professionals can assess providers' AI and ML maturity, automation scope, integration ease and observability approach, helping them select the most suitable AIOps platform for agile operations and improved UX.

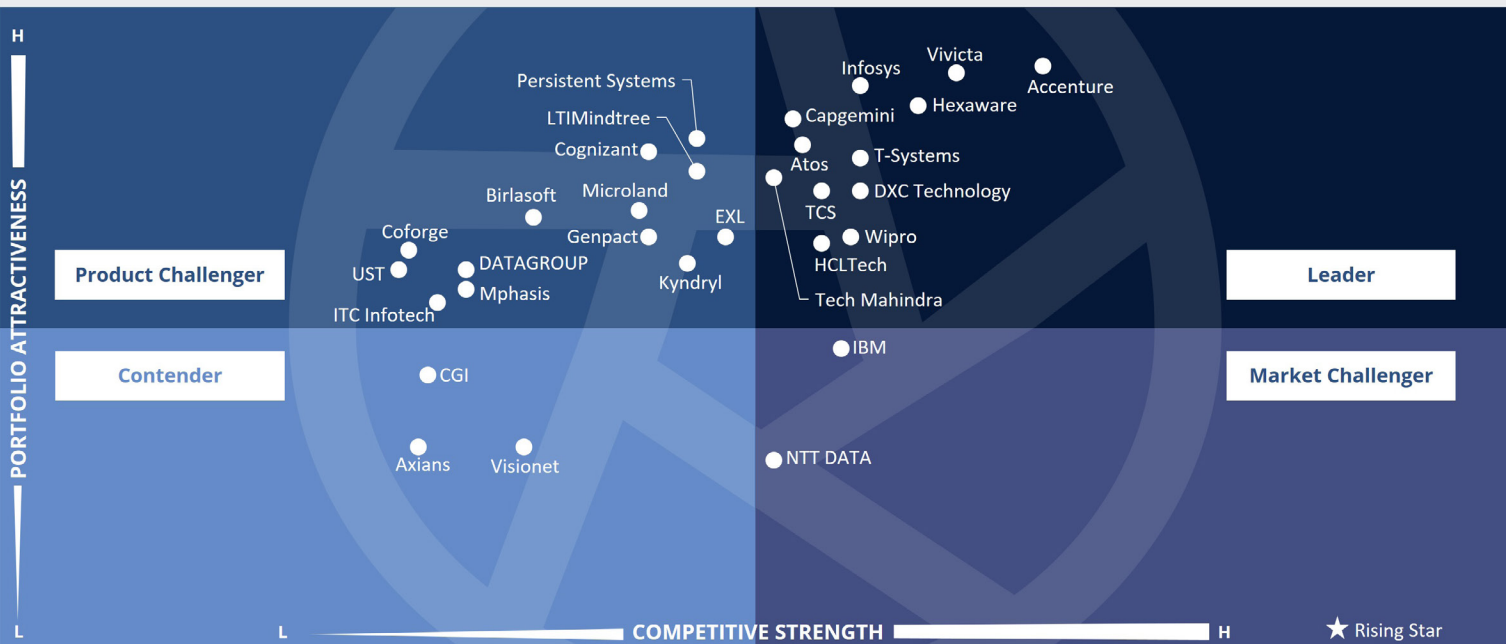
Technology professionals

should read this report to learn how AIOps providers manage transformation projects within complex environments while ensuring operational continuity. The report details providers' strengths, including AIOps capabilities such as anomaly detection and root cause analysis. Such details help technology teams evaluate providers' ability to improve operational metrics such as alert reduction, mean time to resolve and system stability.

Procurement professionals

should study this report to understand Europe's current AIOps services provider landscape and assess their suitability for upcoming RFPs. These professionals can streamline vendor selection, benchmark pricing models, assess SLAs and negotiate favorable terms based on a clear view of the competitive AIOps market in Europe.





This quadrant assesses providers that offer AIOps to enterprises in Europe. Providers are investing in **agentic AI capabilities** to move enterprises closer to the goal of **self-healing IT** and **zero-touch operations**.

Mark Purdy



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



Artificial Intelligence for IT Operations (AIOps)

Observations

After several years of relative stasis, AIOps is on the cusp of a major transformation. By far, the biggest disruptor is the emergence of agentic AI, which refers to autonomous AI-powered bots that can act with a high degree of autonomy and carry out complex workflows. Many of the leading providers have revamped their AIOps over the last 12 months, incorporating agentic (and generative) AI elements into areas such as root cause analysis, IT operations, predictive maintenance, automated ticket triaging, incident resolution and ITSM. With agent-driven AIOps, the goal of touchless, self-healing IT is coming a step closer to reality.

Within Europe, providers are emphasizing the role of their AIOps solutions in helping enterprises comply with industry-specific regulatory controls such as data privacy and security standards. Although some providers have strategic partnerships with third-party product providers (for example, those in the observability space), they emphasize that they

can work with a broad range of proprietary third-party and open-source solution providers favored by their clients.

From the 43 companies assessed for this study, 30 qualified for this quadrant, with 12 being Leaders.

accenture

Accenture has added sovereign AI and agentic capabilities into its AIOps architecture, helping enterprises in regulated industries comply with data sovereignty regulations in Europe.

Atos

Atos has incorporated a range of GenAI- and agentic AI-driven automation features into its AIOps IEA platforms and services, including AI-led anomaly detection and self-healing capabilities.

Capgemini

Capgemini, in August 2025, announced an agreement to acquire Cloud4C, a specialist provider of AI-powered ITOps in hybrid, multicloud and sovereign environments.

TECHNOLOGY

DXC Technology has strengthened its partnership with ServiceNow by launching a joint GenAI Center of Excellence. Using Now Assist, it improves predictive incident resolution and AI-driven remediation, helping clients accelerate IT operations transformation.

HCLTech

HCLTech has integrated agentic AI capabilities into its AIOps service portfolio, notably via its AgentForce platform and AgentIQ copilot.

HEXAWARE

Hexaware has incorporated agentic AI root cause analysis (RCA) into its Tensai® for Operations AIOps platform, complementing its existing topology-based RCA.

Infosys

Infosys has invested in a GenAI-powered assistant that addresses a range of common AIOps, developer productivity and ITSM issues.

TATA CONSULTANCY SERVICES

TCS has upgraded WisdomNext™ 2.0 with autonomous orchestration and agentic features. With over 580 AI-driven client engagements in FY25 and partnerships with Google Cloud and NVIDIA, it enables predictive IT operations, automated remediation and IT infrastructure optimization.

TECH mahindra

Tech Mahindra launched Ops amplifAler 4.0, an agentic AIOps platform that leverages AI agents for diagnostics, incident management and autonomous issue resolution, enabling conversational operations, faster remediation and improved enterprise efficiency.

Systems

T-Systems has enhanced its AIOps portfolio with additional AI and ML capabilities, especially in vulnerability detection, RCA and incident triaging.



Artificial Intelligence for IT Operations (AIOps)



Vivicta (previously known as TietoEvry Tech Services) has enhanced its AIOps with a new end-to-end observability platform, aimed at reducing tool sprawl and alert noise in AIOps.



Wipro launched its AI Control Center, a governance and orchestration accelerator in the FullStride Cloud ecosystem. The center provides enterprises with end-to-end visibility and control of GenAI-powered AIOps, including model selection, workload optimization and compliance guardrails.



Atos



"Atos is a leader in AIOps in Europe, integrating a range of powerful agentic AI features into its platforms. It also demonstrates considerable traction among large enterprises."

Mark Purdy

Overview

Atos is headquartered in Bezons, France. It has more than 74,000 employees across 68 countries. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos offers AIOps through various proprietary platforms, such as Polaris for orchestration, Atos Bridge for observability and SyntBots for automation. It offers a Knowledge Pilot conversational agent and an Observability Center of Excellence. Atos has a significant business for its AIOps services business in Europe.

Strengths

Highly interconnectable technology portfolio:

Atos' AIOps tools and platforms can be integrated with a wide range of third-party observability, automation and enterprise software systems, including leading ITSM platforms such as ServiceNow or Jira. Atos' observability platform is based on Dynatrace but connects with many other third-party observability tools, most of which Atos has a robust partnership with.

Agentic AI infusion: Atos has incorporated a wide range of GenAI- and agentic AI-driven automation across its AIOps platform suite, including Atos Bridge, Atos Polaris AI and SyntBots. These platforms now include agentic AI-driven anomaly detection and monitoring, self-diagnosis, remediation, self-healing capabilities and predictive

operations aimed at reducing the mean time to resolution and improving SLA metrics. The Atos Polaris AI platform helps create AI agents that support engineers in application testing and development. Atos is now building functional support agents (e.g., for FSI) that will help customize its platform capabilities to resolve the unique challenges of various industries.

Strong client relationships: Atos has a proven track record of implementing AIOps solutions for major enterprises in Europe. As an example, for a leading telecommunications provider, it implemented an AIOps solution using historical data to identify and assign IT tickets, generating a 20-25 percent improvement in the mean time to resolution for repetitive tickets and a 70-80 percent increase in ticket assignment accuracy.

Caution

Atos' observability tools and platforms rely heavily on Dynatrace. While it provides a wide range of third-party connectors, IT decision-makers should evaluate how this might impact their current observability tool landscape.





Next-Gen Automation

Who Should Read This Section

This report is valuable for service providers offering next-gen automation in Europe 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. Reflecting current trends, global service integrators facilitate effective intelligent automation through change management, skills development, GenAI and agentic AI advancements, data governance and sustainable initiatives.

Strategy professionals

should read this report to benchmark technology providers' relative positioning and capabilities in next-gen automation. This report can assist in identifying strategic partnership opportunities and devising road maps for leveraging next-gen automation to gain a sustainable competitive advantage and drive market differentiation.

Digital professionals

should read this report to learn how providers implement automation best practices for sustainable digital transformation. This report can guide these professionals to implement automation sustainably within a broader digital transformation context. It also provides insights into how leading providers enable digital maturity and operational excellence.

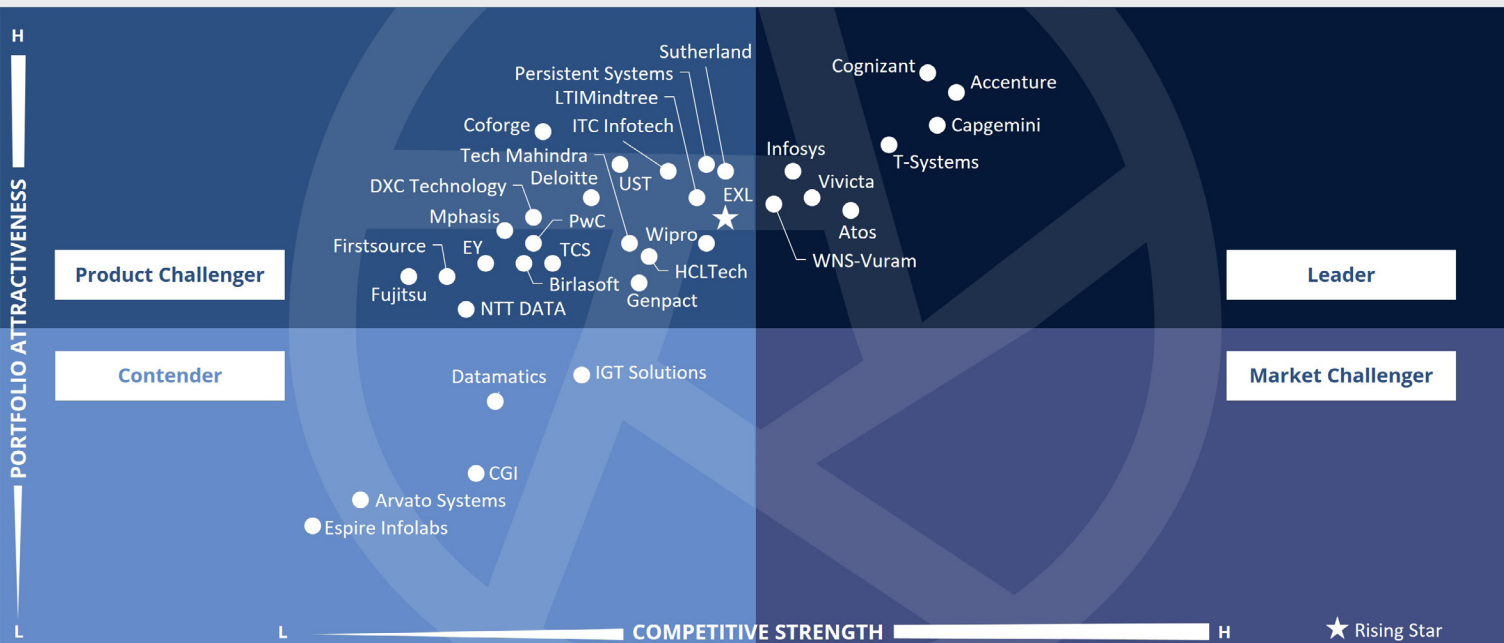
Technology professionals

should read this report to assess how next-gen automation providers tackle end-to-end automation challenges through various solutions and partnerships. These professionals can evaluate the technical merits, integration capabilities and scalability of various solutions and further select the optimal technology stack to build a resilient and future-proof automation infrastructure.

C-suite executives (CEOs, COOs and CIOs)

should read this report to grasp the strategic implications of advanced automation on business models, market positioning and profitability. The report also provides guidance on significant investment decisions for transformative initiatives, delivering measurable enterprise value and fostering sustainable market leadership and enterprise resilience.





This quadrant assesses providers offering **next-gen automation services** to enterprises in Europe. Providers emphasize their capabilities in **change management, automation COEs, responsible AI and user-centric design.**

Mark Purdy



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



Next-Gen Automation

Observations

The next-gen automation market continues to be driven largely by complementary developments in the IEA and AIOps spaces. The most significant change by far is the emergence of agentic AI over the last year, which has spurred leading providers to invest in frameworks and platforms for designing, creating and implementing AI agents for a variety of industries and functional domains. With the rising adoption of autonomous agentic AI systems, providers emphasize their frameworks, assets and tools to help enterprises adhere to responsible AI principles. They also highlight how their change management capabilities can help enterprises navigate a future hybrid digital-human workforce. Leading providers continue to invest in their R&D centers and innovation labs, many of which are designed for coinnovation and service prototyping with clients. With R&D gaining importance in next-gen automation, Leaders are also actively building their external ecosystems, not only with major technology providers but also with universities and research institutions.

From the 43 companies assessed for this study, 34 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture advances next-gen automation with its AI Refinery™ platform, offering prebuilt, industry-specific AI agents that accelerate business value, enhance workforce capabilities and seamlessly integrate into enterprise processes for efficiency and agility.

Atos

Atos emphasizes future human-machine collaboration through its advanced change management and user-centric design capabilities.

Capgemini

Capgemini has made three acquisitions related (in part) to intelligent automation. These acquisitions are Syniti, an enterprise management software company; Cloud4C, a hyper automation provider; and WNS, a major outsourcing and automation provider.

cognizant

Cognizant invests significantly in agentic AI use cases for shared services, industry-specific and enterprise applications. It also engages in AI-led collaborations with hyperscalers, automation platforms and enterprise software providers.

Infosys

Infosys advocates for an incremental, nudge-driven approach to change management to foster sustainable next-gen automation adoption with minimal disruption to organizational workflows.

T Systems

T-Systems helps clients prepare for next-gen automation through its proprietary change management platform Apollo X, supported by a large team of change management professionals across Europe.

vivicta*

Vivicta, formerly known as TietoEvrY Tech Services, was spun out from its parent company, TietoEvrY, in March 2025 and acquired by Agilitas Private Equity. .

WNS

WNS-Vuram has significantly scaled its agentic AI capabilities. In July 2025, Capgemini announced its intention to acquire WNS.

EXL

EXL, a **Rising Star** in Europe, emphasizes its next-gen automation capabilities through multilayered change management and user-centric design.





"Atos leads in next-gen automation across Europe, demonstrating advanced capabilities in areas such as change management and user-centric design to drive impactful transformations."

Mark Purdy

Atos

Overview

Atos is headquartered in Bezons, France. It has more than 74,000 employees across 68 countries. In FY24, the company generated €9.6 billion in revenue, with Tech Foundations as its largest segment. Atos provides a range of next-gen automation services, including consulting and strategy, technology advisory, training and talent development, change management, design thinking, user-centric design and automation CoEs. The company has a significant cohort of professionals trained in different aspects of next-gen automation within Europe.

Strengths

Advanced change management: Atos recognizes that next-gen automation relies heavily on the future design of human-machine collaboration. To this end, it integrates change management principles and practices into intelligent automation projects. To facilitate successful AI-human working, Atos employs a distinct change management methodology called SADKAR (by Prosci), with six stages defined as Strategy, Awareness, Desire, Knowledge, Ability and Reinforcement. This approach leverages extensive expertise in change management and emerging technologies, supported by a global network of industry consultants.

Design thinking and innovation:

Atos harnesses significant expertise in design-thinking-led innovation to foster rapid problem-solving and innovation by clients. It uses techniques such as design sprints, rapid prototyping and a GenAI launchpad framework. For example, these tools have enabled a leading energy company to redesign its procurement processes, assisted a major chemicals company in creating a new search platform, and delivered enhanced UX experiences for healthcare and life sciences clients.

Caution

Atos should consider evolving its change management capabilities and methodologies to adapt to the transformative impact of agentic AI on human-AI collaboration. Embracing these changes will enhance its readiness to address the shifting dynamics in the workplace.





Appendix

The ISG Provider Lens® 2025 – Intelligent Automation Services study analyzes the relevant service providers in the Europe 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 December 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 (\$) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Intelligent Automation Services market
2. Use of questionnaire-based surveys of service providers/vendors 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 and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and 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



Author and Editor Biographies

Lead Author



Mark Purdy
Principal Analyst

Mark Purdy is a Principal Analyst for Europe at ISG Provider Lens® and brings more than 30 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing. Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, among other topics.

He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review on subjects such as the agentic AI and the future of work, AI-led decision-making, and the impact of AI on national competitiveness and techno-political competition.

Enterprise Context and Global Overview Analyst



Sameen Mohammed Siddique
Co-lead Analyst

Sameen is a co-lead analyst with ISG, with a key interest in the market and industry research across emerging technologies. She co-authors Provider Lens® studies on intelligent automation, AWS, Google Cloud, mainframes and others. She is also involved in authoring research articles, enterprise context and global summary reports with emerging technological landscapes. Her areas of expertise are automation, hyperscaler ecosystem, telecommunication, and retail.

Sameen has managed diverse technology, business, and consumer research teams, transforming market data into actionable insights and intelligence reports for several leading firms. In her prior roles, she has worked on competitive intelligence, market feasibility and SWOT assessment, GTM strategy, customer satisfaction and brand health studies. Her expertise synthesizes advanced technological understanding for competitive positioning and emerging innovation trajectories for global and regional markets.



Author and Editor Biographies

Study Sponsor



Namratha Dharshan
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®/ISG Research

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 partner 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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