ISG Provider Lens®

Advanced Analytics and AI Services – Large and Midsize

A research report comparing provider strengths, challenges and competitive differentiators

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Enterprise intelligence grows when data, analytics and AI function as a single operating system

Market context and structural dynamics shaping AAAI in 2025

The advanced analytics and AI (AAAI) services market enters 2025 at a moment of structural consolidation. Over the past two years, enterprises have significantly expanded their data and AI ambitions, moving from isolated deployments toward integrated programs that combine modernization, analytics and AI within shared operating frameworks. ISG studies show that large enterprises operate application portfolios comprising nearly 2,000 systems on average, a scale that intensifies fragmentation and magnifies the importance of data integration, governance and lifecycle consistency. This aligns with the finding that enterprises now manage roughly 1,778 to 1,933 applications, depending on segment mix, according to ISG's 2024 and 2025 research programs.

This structural complexity has reshaped expectations within enterprises. Large-scale organizations entering 2025 are increasingly prioritizing unified data foundations that support both predictive analytics and rapidly growing generative AI (GenAI) usage, as well as broader decision intelligence frameworks, with spending patterns reflecting this shift. ISG research indicates that AI spending as a share of total IT budgets has nearly tripled within a two-year horizon, rising from around two percent to almost six percent as enterprises scale platform investments and operationalize analytics pipelines. Data programs are also absorbing a greater share of transformation budgets, driven by a widespread need to improve data usability, lineage transparency and integration quality. Enterprises expect to derive roughly 15 percent more value from data initiatives within two years, while increasing data staffing by only a small margin.

While large and midsize providers differ meaningfully in their portfolio structures and delivery models, their client bases overlap

Modernization becomes meaningful when it **accelerates trustworthy, measurable AI decisions**.

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more than segmentation labels suggest. Large providers still derive most of their revenue from large global enterprises, but are increasingly investing in midmarket offerings as a growth, innovation and design space. Midsize providers, in turn, often compete directly for large-enterprise programs, especially when buyers value domain expertise, faster decision-making cycles and tighter alignment with business-led transformation teams.

These shifts have created a new competitive landscape for large and midsize providers. Large global integrators possess broad modernization estates, reference architectures and platform-driven governance constructs that align well with a market leaning toward federated data strategies. Their portfolios reflect expansive investments in Fabric and lakehouse patterns, semantic layers and multidomain governance models that help unify analytics and AI across complex enterprise estates. Midsize providers, on the other hand, have focused their investments on accelerators, industry-aligned blueprints and rapid execution frameworks that appeal to buyers seeking specialized domain value. ISG buyer insights reveal that midsize partners often outperform larger integrators in terms of speed, configurability, and vertical fit, particularly when the scope of modernization is more constrained and decision cycles are shorter. This makes the large and midsize segments complementary rather than identical in their positioning.

The broader market environment is also shaped by shifting expectations for value among enterprises. ISG's most recent State of AI study highlights a persistent gap between targeted business outcomes and actual results, particularly in cost reduction, efficiency and revenue growth. Enterprises continue to report difficulties in translating analytical improvements into measurable financial impact, despite AI deployments affecting thousands of employees across various functions. These dynamics put sustained pressure on providers to connect data foundations with operational and financial metrics more explicitly and measurably.

Overall, the context for 2025 reflects a market that has outgrown its experimental phase. Large and midsize organizations now invest in AAAI programs not as adjunct transformations, but as central components of how decision-making, automation and digital operations are executed. Providers that can integrate modernization, analytics and AI into a coherent lifecycle are best positioned to lead this next stage of enterprise adoption.

Adoption and deployment patterns across large and midsize segments

Enterprise adoption of advanced analytics and AI services has deepened considerably, with adoption patterns broadening from traditional analytics and business intelligence (BI) into operational decision intelligence, forecasting, optimization and selective GenAI augmentation. ISG's 2024 buyer research shows that 87 percent of enterprises have already enabled analytics and BI use cases, with strong follow-through in CRM, content management, IT service management and supply chain systems. This reflects a shift away from isolated analytics programs toward analytical enablement across core enterprise platforms. For large and midsize providers, this expansion has translated into a wider opportunity landscape and a greater need to embed analytics capabilities within modernization programs, rather than treating them as discrete consulting engagements.

Deployment maturity varies significantly across different enterprise scales, domains and underlying data quality. Large enterprises continue to lead in the coordinated deployment of AI, supported by centralized governance structures and formalized centers of excellence (CoEs). About 28 percent of organizations manage AI initiatives centrally within IT, and another 23 percent operate through a formal AI CoE. This centralization supports unified evaluation practices, consistent data policies and coordinated experimentation across business units. Large providers naturally fit into this environment, leveraging platforms that support cross-domain data lineage, cataloging, semantic modeling, and multicloud orchestration.

Midsize enterprises display a more hybrid deployment pattern. ISG's data programs research shows that decision ownership for data and analytics often spans CIO leadership, business domain leaders and functional owners. This distributed structure can result in faster implementation cycles but also creates

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variability in lifecycle maturity. It is important to note that this enterprise pattern does not confine midsize providers to midsize clients; many operate as focused challengers or specialists inside large enterprises, particularly in business-led AAAI initiatives or vertical domains where midsize providers offer deeper contextual value. Midsize providers capitalize on this pattern by offering modular accelerators, reusable ingestion frameworks and domain-specific analytics assets that can be implemented with fewer governance prerequisites. Their deployments often balance modernization with targeted analytics outcomes in functions such as CX, finance, revenue operations, manufacturing insights or retail forecasting.

Strategic shifts transforming large and midsize provider positioning

The shift from experimentation to operationalization has compelled enterprises to reassess how data, analytics and AI are governed, scaled and integrated across lines of business. Over the past year, enterprises participating in ISG's global research have increasingly adopted more formalized operating models for AAAI initiatives, moving from isolated projects to coordinated transformation portfolios. This evolution is evident in the increasing role of C-level executives in AI decision-making, as ISG's State of AI study shows that more than half of AI initiatives now involve C-level sponsors. The shift from exploration to execution has pushed AI from centers of experimentation to the center of enterprise transformation strategies.

Large enterprises have responded by consolidating leadership, governance, and architectural ownership into structures that span the entire enterprise. Many have strengthened AI CoEs, linked data governance with enterprise architecture, and institutionalized roles such as chief data officers and chief AI officers. ISG's 2025 Data Programs Study highlights that, even as 76 percent of organizations believe centralized data governance accelerates insight delivery, only around two-thirds have consistent enterprise architectures, showing both the aspiration and the execution gap. Large providers align strongly to this shift, as their platform-led governance, multidomain lineage frameworks and cloud-agnostic architectures harmonize well with the enterprise goal of unifying data and AI estates.

Midsize enterprises are following a different path. Instead of large-scale governance centralization, they increasingly adopt hybrid operating models that blend central coordination with domain autonomy. This mirrors ISG findings that data roles across application owners, data architects, and designers overlap only about one-third of the time. Midsize organizations, therefore, tend to promote domain-led stewardship models, pragmatic governance layers and flexible road maps that allow business units to advance analytics and AI initiatives at different paces. Midsize providers align naturally with this distributed pattern by offering accelerators, preconfigured data models and cloud-native migration frameworks that can be implemented rapidly and adapted to specific business contexts.

Across both segments, strategy is shifting toward lifecycle-driven design. Enterprises are increasingly aware that analytics and AI outcomes depend not only on data quality or model sophistication but also on the coherence of ingestion, validation, metadata management, lineage, observability, and consumption layers. Most enterprises surveyed cite system complexity and integration barriers as significant obstacles to the usability of data and AI, reinforcing the strategic priority of lifecycle unity. This shift is sharpening expectations for providers to articulate how modernization, analytics and AI stack into a single governed ecosystem.

Another strategic shift involves the rising importance of business-value alignment. Executives continue to cite new revenue streams, productivity improvements and CX enhancements as top objectives for AI adoption; yet, ISG's studies show that nearly one-quarter of enterprises feel they lag behind their peers in achieving value outcomes. This gap has prompted both large and midsize providers to reorient their messaging around outcome-linked frameworks, value identification and ROI measurement from the outset of AAAI programs. Large providers are embedding outcome frameworks directly into platforms and architecture blueprints,

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while midsize providers focus on domain-led impact models and quicker cycles of measurable improvement.

Finally, hyperscaler and ISV partnership strategies continue to anchor AAAI direction. Buyers are increasingly selecting providers based on their alignment with cloud-native AI roadmaps, marketplace accelerators and data platform ecosystems. ISG's analysis across sectors indicates that organizations rely heavily on external providers for data preparation, model development, system integration and governance activities. As a result, large and midsize providers are reorienting their strategic positioning toward tighter ecosystem co-development, certification pathways and platform-native innovation. This consolidation around ecosystem strategy forms a significant part of how AAI leadership will be defined in the coming cycle.

Execution and delivery expectations driving AAI maturity

Execution maturity across the AAAI landscape has advanced unevenly, influenced strongly by enterprise data readiness, governance discipline and the provider's ability to operationalize modernization and analytics as a single interconnected lifecycle. For large providers, execution is typically grounded in platform integration and global delivery frameworks that emphasize consistency across ingestion, pipeline engineering, metadata curation, lineage propagation and model lifecycle management. Their execution patterns often reflect the presence of enterprisewide reference architectures that support multicloud interoperability, governed semantic layers and standardized deployment pipelines. This aligns with enterprise expectations captured in ISG's data programs research, where organizations consistently emphasize the need for integrated data management platforms and cross-domain visibility to support scalable analytics and AI.

Midsize providers, while not wielding the same global platform breadth, compensate through faster delivery cycles and stronger domain engineering footprints. They execute more efficiently in programs where the scope of modernization is well defined and vertically oriented. Many midsize providers rely on prebuilt ingestion templates, accelerators for cloud migration, lightweight semantic models and structured DataOps routines that shorten implementation timelines. While they may not always match large providers in terms of enterprisewide integration rigor, their ability to align quickly with functional leaders and business units enables them to deliver results in shorter cycles. This dynamic corresponds with enterprise expectations that emphasize productivity gains and operational efficiency as leading motivations for AI adoption, as reported across ISG's buyer behavior studies.

Model lifecycle execution has become a decisive differentiator for both segments. Large providers have begun integrating MLOps and LLMOps as extensions of their modernization frameworks, embedding quality checks, drift monitoring, compliance validation and model retraining pathways directly into their delivery ecosystems. Enterprises increasingly expect these capabilities, as AI initiatives can now impact thousands of employees within an organization and require operational predictability. ISG's State of AI study notes that the average enterprise AI initiative already affects more than 1,600 employees, underscoring the need for lifecycle reliability, performance monitoring and user governance. Midsize providers have made progress in lifecycle readiness but vary widely in their ability to implement unified monitoring or automated retraining. Their strength lies in domain-aligned model engineering and targeted evaluation workflows, which enterprises value in vertical-specific scenarios but which require integration with broader governance structures to scale.

Observability, telemetry and cross-environment lineage remain critical execution gaps. While large providers increasingly deploy integrated observability dashboards that unify pipeline health, model performance and data quality signals, these capabilities are not yet universal. Midsize providers often rely on tool-native monitoring capabilities, creating variability in lifecycle transparency. ISG's 2025 Data Programs Study shows that nearly half of disruptions to data initiatives stem from inadequate tools or fragmented data structures, underscoring the ongoing execution burden of unifying estates across legacy and cloud platforms. Such gaps highlight the

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importance of execution models that integrate DataOps, MLOps and LLMOps into a cohesive spine supporting both modernization and advanced analytics.

Finally, execution excellence now depends heavily on change readiness, process reengineering and business alignment. Enterprises are increasingly recognizing that AI outcomes necessitate adjustments in roles, workflows and decision-making processes, rather than merely technical deployments. Large providers often integrate these dimensions through structured change programs, adoption frameworks and workforce enablement layers. Midsize providers tend to address these needs more situationally, aligning closely with business teams to embed analytics outputs directly into daily operations. This difference in approach reflects broader distinctions in execution philosophy. Still, it ultimately reinforces a common market trend: AAAI must be delivered as a continuous operational capability rather than a project, requiring providers to execute with both architectural discipline and business fluency.

Enterprise challenges influencing large and midsize AAAI strategies

Enterprises entering 2025 continue to confront structural challenges that limit the full realization of value from advanced analytics and AI. ISG's global research across both data and AI programs confirms that complexity within the enterprise application estate remains one of the most significant inhibitors to scale. Most large organizations operate with over 2,000 applications, yet fewer than one-third report consistent data architecture standards, making integration and interoperability challenging. This fragmentation forces enterprises to rely heavily on providers to unify ingestion frameworks, metadata definitions, and lineage models, enabling analytics and AI to be deployed reliably across business units. Large providers align well with these needs due to their architectural breadth. Still, midsize providers must compensate with targeted accelerators and modular governance patterns that ensure consistency without requiring full estate consolidation.

Data usability for AI persists as the most critical enterprise-level barrier. ISG's Data and AI Programs Study identifies it as the top challenge for most industries, ahead of integration, scalability and security. Enterprises report that inconsistent taxonomies, varying data quality and fragmented ownership impede efforts to apply predictive and generative intelligence at scale. While modernization programs have improved ingestion and warehousing, many organizations lack the unified semantic models and cross-domain lineage that would allow AI models to interpret data consistently. Large providers have begun embedding semantic governance into their platforms. In contrast, midsize providers often specialize in addressing these challenges within individual domains, which accelerates localized success but makes cross-enterprise scale more challenging.

A second major challenge is the persistent difficulty in measuring ROI for analytics and AI initiatives. ISG research indicates that data and AI investments are expected to increase by more than a third over the next two years; however, enterprises struggle to attribute financial outcomes to specific initiatives. This issue is particularly pronounced in AI programs, where efficiency, decision quality and customer experience gains are valued but often challenging to quantify. ISG's State of AI study indicates that enterprises consistently underperform against expectations across cost savings, revenue growth and productivity metrics. This mismatch reflects gaps in both planning and governance. Without upfront value definition frameworks, organizations sometimes pilot AI in function-specific pockets without clear alignment to measurable business objectives. As a result, both large and midsize providers are being pushed to incorporate value tracing, KPI frameworks and ROI modeling earlier in the lifecycle to help clients justify continued investment.

Talent constraints also remain a structural barrier. ISG studies indicate that organizations cite shortages of specialized AI talent and the difficulty of acquiring hybrid technical and business roles as top challenges for 2025 and 2026. These shortages slow modernization programs, delay AI deployment and limit enterprise readiness for self-service analytics. Large providers generally address these constraints through global delivery centers,

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standardized training programs and embedded client enablement models, while midsize providers often operate with leaner teams and specialized domain talent. This leaves midsize organizations vulnerable when clients require comprehensive capability coverage or multiregion scaling, reinforcing the importance of upskilling, shared delivery models and strategic partnerships.

Security, risk and compliance pressures add another dimension of complexity. Enterprises are increasingly acknowledging that data residency, access controls and compliance with emerging AI regulations influence their willingness to scale AI programs. ISG's 2024 buyer research shows that security risks cause nearly 40 percent of organizations to limit data retention. Large providers often integrate security into modernization frameworks and lineage models, while midsize providers handle compliance at the solution or use-case level. As regulatory expectations grow, enterprises are increasing their demands for providers to deliver more robust risk governance, ethical AI controls, and transparent evaluation frameworks.

The cumulative effect of these challenges is a market where enterprises expect providers to do more than deliver technical solutions. They expect them to bridge governance gaps, embed measurement frameworks, secure compliance pathways and supply the talent required to support continuous operational intelligence. Providers that cannot meet these expectations risk reduced influence as AAAI becomes a central operating discipline within modern enterprises.

Forward drivers and outlook for AAAI leadership in 2025-2026

The advanced analytics and AI services market is entering a period where enterprise demand is shifting from exploratory adoption toward systemic AAAI integration. Several forward drivers identified across ISG's multistudy research programs signal how the next two years will reshape expectations for both large and midsize providers. Enterprises anticipate meaningful increases in data and AI investments, with ISG's Data and AI Programs Study highlighting an average expected rise of around seven percent in data program budgets and a roughly 15 percent increase in expected business value from these investments. These expectations reflect a strategic shift, where AAAI becomes an integrated operating capability rather than an optional transformation layer.

A central driver for the next wave of AAAI adoption is the movement toward federated intelligence architectures. For enterprises, the future state of AAAI will require unifying distributed data ecosystems under shared governance, lineage and semantic models. Observations from large providers already indicate a continued push toward multidomain data fabrics, enterprisewide cataloging and the integration of predictive and generative intelligence into shared decision-making platforms. Midsize providers, while not universally building fabric-level platforms, contribute meaningfully through accelerators, domain-specific semantic layers and platform-native AI services that plug into broader enterprise estates. ISG research indicates that data platform integration across financial, HR and operational logs is improving; however, the integration of more complex sources, such as ESG, market data and scientific content, remains below 30 percent, signaling a continuing need for providers to create stronger bridges across data categories.

Another forward driver is the growing emphasis on decision intelligence as the business-facing manifestation of analytics and AI. Enterprises increasingly report that the value of analytics and AI is realized most clearly through improvements in operational decision-making, customer experience, forecasting accuracy and workflow automation. ISG's buyer behavior insights show that cost optimization, predictive operations and customer experience enhancements remain the most valuable use case clusters. Large providers are well positioned to embed decision intelligence within their enterprise platforms. In contrast, midsize providers often lead in industry-specific decision models and use-case libraries that accelerate adoption within specific verticals.

Innovations in talent and operating models will also shape the next stage of AAAI's evolution. ISG's talent studies consistently highlight shortages of specialized AI talent and the challenge of acquiring hybrid technical-business roles. As AAAI becomes more deeply

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embedded in enterprise operations, providers will increasingly compete on their ability to supply, train and embed talent that can navigate both data engineering and applied analytics domains. Large providers will continue to leverage global delivery networks and structured talent development programs, while midsize providers will differentiate through deeper domain expertise and the ability to co-deliver with business teams. Enterprises will expect providers to play a more significant role in guiding workforce transformation, from upskilling programs to new operating structures that align data, analytics and AI under a common governance framework.

Looking ahead, the commercial landscape surrounding AAAI services is also expected to evolve. Enterprises express growing interest in consumption-based and outcome-linked pricing models, especially as they face increased pressure to demonstrate ROI. ISG's State of AI study reveals that many organizations have not realized the expected improvements in productivity, cost savings or revenue growth from their AI initiatives, despite increasing budgets. This will prompt providers to strengthen value realization frameworks, introduce clearer performance metrics and design commercial constructs that align with measurable business outcomes. Providers that bring transparency, flexibility and co-ownership of results will have a competitive advantage.

The closing outlook for 2025 and beyond suggests a market characterized by lifecycle maturity, value measurement discipline and architectural coherence. Enterprises will increasingly seek partners capable of delivering AAAI as a continuous operational capability, supported by integrated data foundations, automated lifecycle management and end-to-end governance. Large providers will lead where structural scale, platform integration and global governance are essential. Midsize providers will continue to gain share in vertical-focused programs and modernization-led transformations where agility and domain depth matter most. Together, these segments will shape a landscape where AAAI is no longer treated as a series of initiatives but as a foundational system of intelligence that supports enterprisewide transformation and future growth.

Real AI value emerges when modernized data estates, governed pipelines and automated model lifecycles reinforce each other. Organizations are seeking disciplined execution that reduces complexity and improves decision clarity. The path forward lies in combining platform strength with transparent ROI frameworks and consumption-ready intelligence for business teams.

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Accenture	Leader	Not In	Leader	Not In
Akkodis	Product Challenger	Not In	Product Challenger	Not In
Apexon	Not In	Leader	Not In	Leader
Aspire Systems	Not In	Contender	Not In	Contender
Atos	Leader	Not In	Leader	Not In
Birlasoft	Not In	Product Challenger	Not In	Product Challenger
Brillio	Not In	Leader	Not In	Leader
Capgemini	Leader	Not In	Leader	Not In
CGI	Market Challenger	Not In	Market Challenger	Not In
Chetu	Not In	Product Challenger	Not In	Product Challenger

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Coforge	Not In	Rising Star ★	Not In	Rising Star ★
Cognizant	Leader	Not In	Leader	Not In
Deloitte	Market Challenger	Not In	Market Challenger	Not In
DXC Technology	Rising Star ★	Not In	Rising Star ★	Not In
Encora	Not In	Market Challenger	Not In	Market Challenger
EPAM Systems	Product Challenger	Not In	Product Challenger	Not In
EXL	Not In	Leader	Not In	Leader
EY	Product Challenger	Not In	Product Challenger	Not In
Fujitsu	Contender	Not In	Contender	Not In
Genpact	Leader	Not In	Leader	Not In

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Grazitti Interactive	Not In	Contender	Not In	Contender
Happiest Minds	Not In	Product Challenger	Not In	Product Challenger
HARMAN	Not In	Leader	Not In	Leader
HCLTech	Leader	Not In	Leader	Not In
Hexaware	Not In	Leader	Not In	Leader
HTC Global Services	Not In	Leader	Not In	Leader
IBM	Leader	Not In	Leader	Not In
IGT Solutions	Not In	Product Challenger	Not In	Contender
Indium	Not In	Product Challenger	Not In	Product Challenger
Infogain	Not In	Market Challenger	Not In	Market Challenger

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Infosys	Leader	Not In	Leader	Not In
Innova Solutions	Not In	Leader	Not In	Leader
ITC Infotech	Not In	Product Challenger	Not In	Product Challenger
KPMG	Product Challenger	Not In	Product Challenger	Not In
Kyndryl	Market Challenger	Not In	Market Challenger	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In
Marlabs	Not In	Market Challenger	Not In	Contender
Mastek	Not In	Contender	Not In	Contender
Mphasis	Not In	Leader	Not In	Leader
NTT DATA	Product Challenger	Not In	Product Challenger	Not In

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Orion Innovation	Not In	Product Challenger	Not In	Product Challenger
Persistent Systems	Not In	Leader	Not In	Leader
PwC	Product Challenger	Not In	Product Challenger	Not In
Rackspace Technology	Product Challenger	Not In	Product Challenger	Not In
Randstad Digital	Contender	Not In	Contender	Not In
Softtek	Not In	Not In	Not In	Product Challenger
Stefanini	Not In	Leader	Not In	Market Challenger
TCS	Leader	Not In	Leader	Not In
Tech Mahindra	Leader	Not In	Leader	Not In
TP	Product Challenger	Not In	Not In	Not In

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Provider Positioning

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	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Trianz	Not In	Product Challenger	Not In	Product Challenger
Unisys	Not In	Leader	Not In	Leader
UST	Not In	Leader	Not In	Leader
Virtusa	Not In	Leader	Not In	Leader
Visionet	Not In	Product Challenger	Not In	Product Challenger
Wipro	Leader	Not In	Leader	Not In
Xoriant	Not In	Product Challenger	Not In	Product Challenger
YASH Technologies	Not In	Product Challenger	Not In	Product Challenger
Zensar Technologies	Not In	Contender	Not In	Product Challenger

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The study highlights the evolving market trends and competitive dynamics among **advanced analytics and AI services** providers in 2025.

- **Data Science and AI Services — Large**
- **Data Science and AI Services — Midsize**
- **Data and Analytics Modernization Services — Large**
- **Data and Analytics Modernization Services — Midsize**

Simplified Illustration Source: ISG 2025

Definition

Analytics and AI services are reshaping how organizations harness data for decision-making and business value. The integration of data and applied AI with business strategies compels enterprises to position cognitive AI as a core framework for business decisions. This shift serves as a cornerstone for decision-making and a catalyst for innovation. As AI model accuracy relies on data, the demand for clean, secure and high-quality data increases substantially as enterprises seek to unlock data value and generate actionable insights.

The emergence of IoT devices and cloud-based digital platforms has led to a significant surge in data volumes, demanding robust and modernized data ecosystems. Enterprises aim to integrate AI solutions across their value chain, and data integration, quality and comprehensiveness are critical for last-mile analytics. Moreover, heightened awareness of data and AI regulations is mandating the responsible development of analytics solutions.

The advent of GenAI, agentic AI and autonomous systems is capturing the mindshare of business leaders, as these technologies are essential for automating workflows and enhancing operational performance. Simultaneously, there is an increasing focus on fostering a data-driven culture within enterprises, which fuels innovation and unlocks opportunities to democratize and monetize data. To support enterprises with these automation and innovation initiatives, service providers are increasingly investing in developing frameworks, accelerators, simulation models and customizable AI solutions to streamline the data-to-insights lifecycle.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services: Data Science and AI Services — Large, Data Science and AI Services — Midsize, Data and Analytics Modernization Services — Large and Data and Analytics Modernization Services — Midsize.

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

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. market

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.

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:

- **Mid-size Providers:** On the other hand, generate less than $4 billion in revenue and typically specialize in 3-4 verticals where they hold strong capabilities and significant revenue share. With a leaner workforce of under 75,000 employees, these providers adopt an agile and flexible approach, making them well-suited to serve both large enterprises and mid-market clients with tailored, industry-specific solutions. They also have strong inherent capabilities and heritage in Digital Engineering services. This combination of domain expertise, flexibility, and a strong focus on innovation positions them as effective partners for businesses seeking to implement cuttingedge technologies with a faster, more agile approach.
- **Large Providers:** Are those with revenues exceeding $4 billion and a workforce of over 100,000 employees. They cater to multipleverticals, often spreading their resources across a broad range of industries. Their primary focus lies in serving large enterprises, often engaging in large transformation projects that require deep expertise, extensive resources, and the ability to manage complex, enterprise-wide innovations. Their deep industry experience, broad service capabilities, and strategic partnerships with technology giants position them as key players in the global digital services landscape.
- **Specialists:** Are service providers uniquely positioned due to their niche capabilities, which are either deeply embedded in specific verticals (e.g., healthcare, financial services) or concentrated on specialized service areas like AI and analytics. Typically, these providers focus intensely on 2-3 verticals where they hold a significant market share and expertise, allowing them to deliver highly tailored and innovative solutions. With a workforce of fewer than 10,000 employees, specialists leverage their agility and flexibility to serve both large and midmarket enterprises. Their approach emphasizes solution-based problem-solving, making them highly responsive to the specific needs of their clients.

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).

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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.

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.

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

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.

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Data Science and AI Services — Large

This report is valuable for providers offering **data science and AI services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers.

In this quadrant, ISG highlights the shifting priorities of enterprises, offering large service providers opportunities to evaluate and advance their analytics maturity while scaling AI adoption by operationalizing AI programs. The report highlights enterprises' expectations for AI-driven decision-making that can deliver measurable business outcomes across their key functions and operational workflows.

Chief data and AI officers

Should use this report to seek providers that can help form data strategies focusing on effective data governance and AI implementation for leveraging data in AI and ML solutions. The report offers insights into providers' specialized AI capabilities across different verticals and highlights how they support enterprises in establishing clear policies for data access, quality control and regulatory compliance.

Chief information and compliance officers

Should read this report to identify providers that ensure seamless AI and ML adoption while improving data integrity and scalability in their information systems. It offers insights into providers that embed risk mitigation and governance frameworks into AI and ML deployments, ensuring alignment with regulatory and security standards.

Line-of-business managers

Should read this report to gain insights into providers that can assist in developing and managing ML solutions, aligning with business goals and requirements. The report also outlines how service providers can help businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.

Strategy professionals

Should read this report to understand how service providers deliver advisory and implementation services to help enterprises build resilient operational workflows. Understanding the providers' capabilities would enable strategy professionals to reorient their innovation road maps, accelerate AI initiatives and anticipate and mitigate risks.

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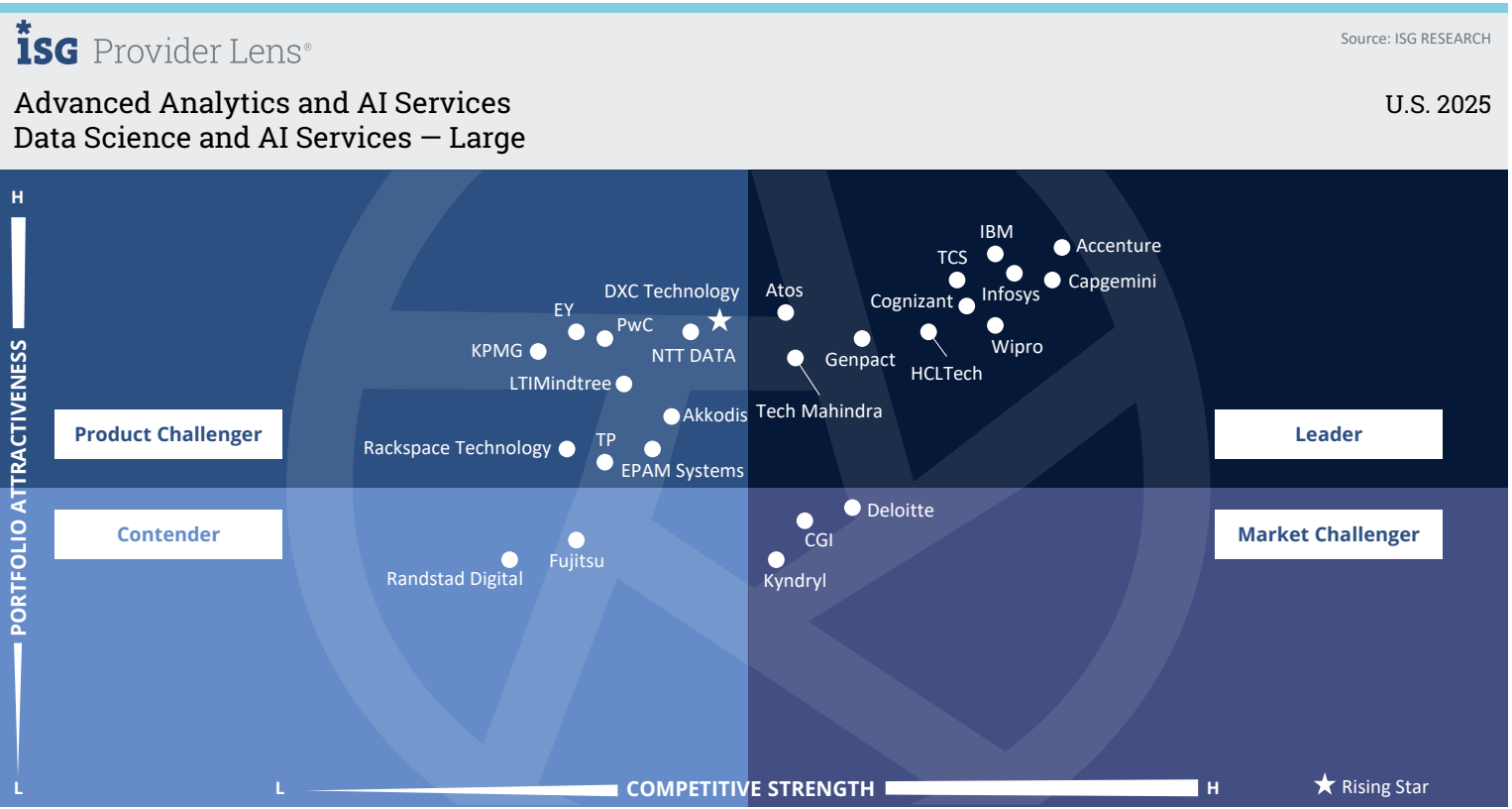

This quadrant assesses large service providers with **expertise in data science, advanced analytics and AI** technologies that enable enterprises to **unify intelligence, improve decision accuracy** and translate models into **measurable business outcomes**.

Gowtham Kumar Sampath

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Definition

In this quadrant, ISG evaluates providers that offer advisory and system integration services based on data science. These providers should offer services that integrate scientific methods with clients' business contexts. As autonomous and generative enterprise systems gain prominence, these providers should help enterprises incorporate applied AI and ML techniques into their strategies and workflows. The objective is to develop, deploy and continuously manage ML models for business use cases, while leveraging AI frameworks to optimize operations, drive growth and unlock new revenue streams.

Service providers should address end-to-end enterprise requirements, including consulting, identifying business use cases, developing statistical models and managing the entire ML lifecycle. They must provide real-time insights through self-service analytics and apply modern techniques, including data storytelling and conversational BI, to facilitate proactive decision-making.

Eligibility Criteria

1. Provide a **structured approach** that encompasses a **framework** and **service portfolio** featuring proprietary offerings, including **industrialized playbooks, AI and ML platforms, accelerators and workbenches**
2. Exhibit end-to-end capabilities in architecting, implementing, deploying and scaling **enterprisewide AI projects**, along with the ability to model and **customize AI algorithms** for specific needs
3. Demonstrate established competence with a team of **data science experts**, delivering services with a **deep understanding of market dynamics, regulatory requirements** and the **specific language** necessary for successful delivery
4. Possess **technology expertise and knowledge** of region- and **industry-specific** business requirements, along with **statistical and mathematical modeling capabilities**, to provide independent advisory services
5. Deliver specialized solutions for **advanced analytics in federated learning**, including computer vision, audio processing, NLP, natural language generation (NLG), graph databases **and next-gen BI,** such as data storytelling and generative BI
6. Offer **support and training services** as standalone offerings, distinct from other service contracts

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Observations

In 2025, large providers have established and increasingly unified data science and AI (DSAI) capabilities, integrating predictive analytics, ML engineering, decision intelligence and early-stage generative methods within structured, platform-driven delivery models. Most have repositioned DSAI as an enterprise function rather than a project-based service, embedding model development, evaluation and consumption into their data platforms and operational systems. This reflects the rising expectations of enterprises that AI must support decisions across finance, operations, risk, CX and engineering, rather than remaining siloed within analytics teams.

Lifecycle discipline is a defining strength for large providers that are increasingly incorporating MLOps and emerging LLMOps within modernization estates, enabling automated scoring, drift monitoring, lineage-connected evaluation and governed human involvement. Their model engineering spans forecasting, optimization, classification, NLP and multimodal analytics, often anchored in curated features and industry-specific validation. This helps scale DSAI in regulated settings with greater reliability.

The challenge for large providers is ensuring that technical deployment converts into measurable business outcomes. Enterprises still report gaps in value realization even when model pipelines are mature. DSAI programs risk becoming platform-centric unless accompanied by business alignment, domain change readiness and clear pathways to operational impact.

In 2025, leadership in DSAI will depend on linking lifecycle maturity to decision outcomes and demonstrating how advanced modeling directly influences financial and operational performance.

From the 90 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture continues to expand its data and AI innovation ecosystem through new applied analytics accelerators, AI-driven governance frameworks and data reinvention playbooks that link business modernization with measurable decision intelligence outcomes.

Atos reinforces its analytical foundation with modular AI Factory playbooks and advanced governance toolkits, expanding adoption of reusable modeling frameworks and agent-ready data pipelines to accelerate enterprise-scale data modernization and analytical transformation.

Capgemini's expansion of agentic-ready data foundations and the industrialization of applied AI models emphasize lifecycle consistency and observability across regulated and AI-intensive industries, reinforcing decision-intelligence maturity.

Cognizant's portfolio evolution centers on integrating agentic AI orchestration into its data science lifecycle and expanding reusable model libraries to improve time to value and embed stronger auditability within predictive modeling frameworks.

Genpact has expanded its data science framework library, refining its Gigafactory and G Solution platforms to support scalable model governance, federated MLOps and vertical-specific AI blueprints across BFSI, life sciences and manufacturing programs.

HCLTech has refined its AI Foundry stack to enhance experiment-to-production velocity and introduce reusable components for vertical analytics, signaling greater focus on outcome-linked data science delivery and expanded governance within large-scale enterprise programs.

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IBM expanded its offerings with integrated frameworks under the watsonx and IBM Consulting Advantage platforms, emphasizing reusable model governance, scalable data products and the extension of decision-intelligence capabilities to domain-led analytics operations.

Infosys' portfolio highlights new accelerators for automated data harmonization, domain-aligned ML pipelines, and governance frameworks that integrate responsible AI checkpoints into model validation for scalable and repeatable modernization.

TCS delivers an analytics-led modernization strategy through integrated AI platforms and agentic design frameworks that combine predictive modeling with knowledge-graph-based reasoning, emphasizing federated modeling, enterprise observability and decision intelligence.

Tech Mahindra emphasizes industrializing model pipelines and embedding data storytelling within analytics modernization programs, supported by reusable accelerators and co-innovation workstreams that expand footprint across multicloud and hybrid AI environments.

Wipro's recent launches in model evaluation, FinOps for AI workloads and domain-focused agent orchestration illustrate its pivot toward outcome-based data science transformation, emphasizing lifecycle visibility, platform reusability and accelerated deployment.

DXC Technology's recent developments emphasize operationalized AI engineering, including lifecycle automation frameworks and federated data-to-AI pipelines that strengthen governance, observability and deployment readiness across enterprise-scale environments.

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Leader

"Atos demonstrates consistent strength in AI-led transformation, combining advanced statistical modeling expertise with structured practices across advisory, deployment and governance, positioning it as a disciplined, compliance-ready innovator."

Gowtham Kumar Sampath

Atos

Overview

Atos Group is headquartered in Bezons, France. It has more than 67,000 employees across 61 countries under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue, with erstwhile Tech Foundations as its largest segment. Atos delivers domain-aligned data science capabilities across industry sectors, anchored by its AI Factory framework and Atos Polaris AI platform. Its approach combines data strategy advisory with model lifecycle management, providing end-to-end visibility from discovery through deployment. Atos' modular accelerators, AI integration and MLOps practices enable scalable and repeatable analytics delivery.

Strengths

Applied AI across verticals: Atos embeds AI within compliance-heavy and process-intensive sectors through tailored frameworks addressing regulatory requirements, risk and operational intelligence. Its structured advisory approach and domain-aligned modeling ensure contextual relevance in decision support and statistical forecasting. This vertical coherence supports Atos' positioning as a trusted AI partner, balancing regulatory constraints with predictive precision.

Scalable data-to-insight integration: Atos' Polaris AI platform and GUIDE framework connect structured modernization with applied analytics, creating a unified data-to-AI lifecycle. This architecture allows seamless migration of analytical models into production and supports hybrid deployment scenarios. The design accelerates time-to-insight, enabling organizations to evolve from siloed BI systems to predictive and prescriptive decision intelligence.

Operationalized model lifecycle and MLOps maturity: Atos applies standardized MLOps and GenOps workflows to manage data ingestion, model retraining and performance validation. Embedded governance, versioning and testing enhance reliability and auditability. Its disciplined approach to retraining pipelines and observability makes model performance transparent and repeatable, aligning with enterprise-grade operational requirements.

Caution

Atos' advisory-to-analytics integration, though structured, could benefit from standardized playbooks that can be externally validated and made scalable for adoption across industries. The firm can enhance model lifecycle automation and continuous telemetry through clearer public evidence of MLOps dashboards and evaluation metrics.

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Data Science and AI Services — Midsize

This report is valuable for providers offering **data science and AI services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers.

In this quadrant, ISG highlights the shifting priorities of enterprises, and positions midsize providers with strong expertise in industries such as financial services, healthcare, retail and manufacturing that support AI initiatives to meet industry-specific requirements. It also emphasizes the need to leverage providers' vertical depth to enhance data-driven decision-making across enterprise core operations.

Chief data and AI officers

Should utilize this report to identify providers that can assist in developing data strategies, ensuring effective data governance and AI implementation for leveraging data in AI and ML solutions. The report offers insights into providers' specialized AI capabilities across different verticals and highlights how they support enterprises in establishing clear policies for data access, quality control and regulatory compliance.

Chief information and compliance officers

Should read this report to identify providers that ensure seamless AI and ML adoption while improving data integrity and scalability in their information systems. the report offers insights into providers that embed risk mitigation and governance frameworks into AI and ML deployments, ensuring alignment with regulatory and security standards.

Line-of-business managers

Should read this report to gain insights into providers that can assist in developing and managing ML solutions, aligning with business goals and requirements. The report also outlines how service providers can help businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.

Strategy professionals

Should read this report to understand how service providers deliver advisory and implementation services to help enterprises build resilient operational workflows. Understanding the providers' capabilities would enable them to reorient their innovation road maps, accelerate AI initiatives and anticipate and mitigate risks.

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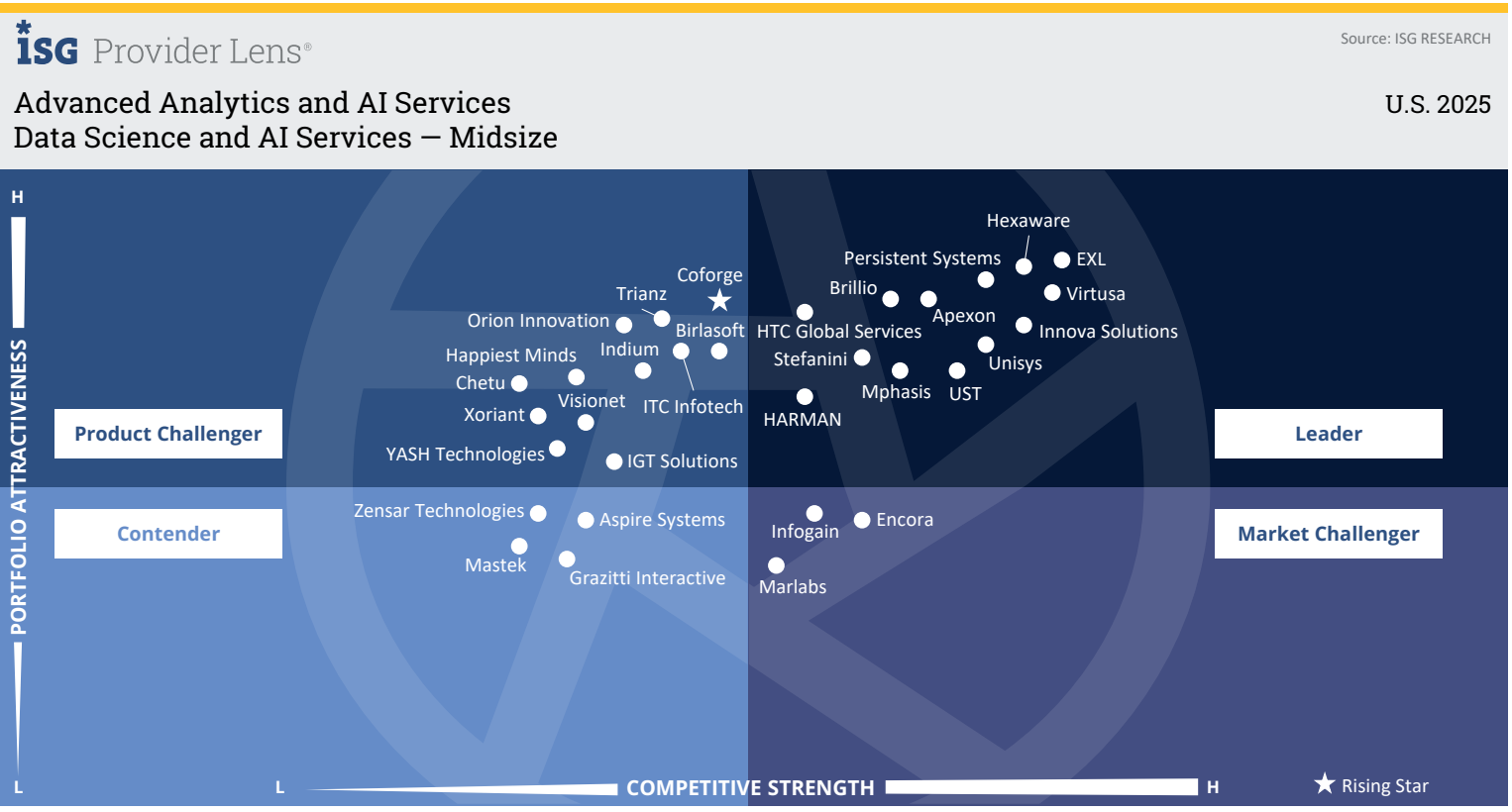

This quadrant assesses midsize service providers with **expertise in data science, advanced analytics and AI** technologies that enable enterprises to **unify intelligence, improve decision accuracy** and translate models into **measurable business outcomes**.

Gowtham Kumar Sampath

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Definition

In this quadrant, ISG evaluates providers that offer advisory and system integration services based on data science. These providers should offer services that integrate scientific methods with clients' business contexts. As autonomous and generative enterprise systems gain prominence, these providers should help enterprises incorporate applied AI and ML techniques into their strategies and workflows. The objective is to develop, deploy and continuously manage ML models for business use cases, while leveraging AI frameworks to optimize operations, drive growth and unlock new revenue streams.

Service providers should address end-to-end enterprise requirements, including consulting, identifying business use cases, developing statistical models and managing the entire ML lifecycle. They must provide real-time insights through self-service analytics and apply modern techniques, including data storytelling and conversational BI, to facilitate proactive decision-making.

Eligibility Criteria

1. Provide a **structured approach** that encompasses a **framework** and **service portfolio** featuring proprietary offerings, including **industrialized playbooks, AI and ML platforms, accelerators and workbenches**
2. Exhibit end-to-end capabilities in architecting, implementing, deploying and scaling **enterprisewide AI projects**, along with the ability to model and **customize AI algorithms** for specific needs
3. Demonstrate established competence with a team of **data science experts**, delivering services with a **deep understanding of market dynamics, regulatory requirements** and the **specific language** necessary for successful delivery
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6. Offer **support and training services** as standalone offerings, distinct from other service contracts

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Observations

Midsize providers enter 2025 with agile and domain-aligned data science and AI capabilities designed for rapid deployment and business-centered impact. Their DSAI portfolios emphasize configurable accelerators, domain-specific modeling templates and cloud-native engineering that support fast time to value. Many midsize firms have advanced skills in forecasting, optimization, NLP, multimodal analytics and applied ML by combining curated datasets with streamlined feature engineering.

Their strength lies in embedded execution. Midsize providers often work directly with business and operational teams, enabling faster translation of requirements into deployed models. This agility is particularly valuable in functional areas such as customer experience, finance, operations, and supply chain, where domain nuance significantly impacts performance.

Scalability, however, remains inconsistent. Cross-enterprise lifecycle automation, unified telemetry and standardized governance are not always fully developed. While midsize providers excel in delivering strong vertical solutions, they can face challenges when clients require multibusiness-unit consistency, enterprise-grade auditability or uniform performance monitoring.

In 2025, midsize DSAI leadership will depend on pairing their speed and domain insight with improved governance and repeatability. Providers that strengthen lifecycle assurance while preserving their execution agility will remain competitive for high-value enterprise DSAI programs.

From the 90 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon is focusing on platformizing analytics by strengthening model execution governance, expanding a data engineering accelerator to include agent-assisted patterns, and adding conversational insight layers with an emphasis on measured adoption in core business functions.

Brillio

Brillio's analytics portfolio centers on expanding agentic data science frameworks and integrated BI rationalization playbooks, aimed at accelerating advisory-to-deployment workflows and embedding explainability and observability into enterprise-scale modeling environments.

EXL

EXL expanded its applied data science suite with new domain-aligned models for healthcare and retail analytics, leveraging synthetic data generation and automation in model validation, as well as investing in multimodal frameworks for prescriptive and explainable analytics.

HARMAN

HARMAN has expanded its accelerators linking model engineering and advisory-led modernization. The recent integration of lifecycle automation and domain-calibrated AI workflows reflects an increased emphasis on production readiness and scalable analytical governance.

HEXAWARE

Hexaware's initiatives emphasize model lifecycle maturity, observability-first data engineering and cross-cloud experimentation through the operationalization of agentic frameworks and metadata-driven accelerators that connect data modernization with applied analytics.

HTC Global Services

HTC Global Services has strengthened its applied analytics practice through domain-specific model frameworks and embedded data governance controls, reflecting a measured transition from project-led analytics delivery toward production-scale data science execution.

Innova Solutions

Innova Solutions' applied focus on healthcare, manufacturing and logistics combines data modernization with model-driven automation, reflecting steady progress from legacy analytics toward scalable AI operationalization across regulated enterprise environments.

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Mphasis extends its AI, ML and analytics footprint through DeepInsights™ and HyperGraf™, backed by NEXT Labs research and a Responsible AI framework. Delivery is reinforced by Stelligent's DataOps program and AWS-aligned solution listings across industries.

Persistent Systems expanded its AI-first data strategy with the release of iAURA 2.0, incorporating agentic workflows for lineage tracking, automated BI rationalization and regulatory-grade data reconciliation within modular pipelines built for scalable deployments.

Stefanini's data science integration within its AI-first modernization strategy incorporates modular accelerators and domain-specific frameworks, strengthening advisory-led model development and accelerating enterprise adoption across key regulated and industrial verticals.

Unisys evolves its applied AI strategy by operationalizing composable architectures and tenant-hosted data platforms, as well as the ongoing development of the Pulse Agent and ontology-based orchestration stack, reinforcing a pragmatic, outcome-driven approach to AI implementation.

UST has integrated predictive and generative AI into its delivery fabric through internal agent registries, multimodal modernization platforms and verticalized accelerators, enabling architecture-driven execution across legacy and domain-specific data intelligence scenarios.

Virtusa has extended its GenAI delivery model through Helio Data Studio, integrating structured dataset QA, prompt conditioning and corpus evaluation into development workflows to support domain-specific modeling and downstream production.

Coforge continues to expand its applied AI delivery through the Quasar platform and Trust AI governance stack. At the same time, its Data4AI offering and model lifecycle accelerators are being increasingly embedded across various verticals, including BFSI, travel and retail.

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Data and Analytics Modernization Services – Large

This report is valuable for providers offering **data and analytics modernization services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the shifting priorities of enterprises, offering large service providers opportunities to unlock the value of data assets and generate real-time actionable insights. It also discusses the opportunities for large service providers to design, manage and govern modern data platforms that support analytics and AI programs and foster a culture of data centricity.

Chief data officers

Can read this report to gain insight into providers' analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes. The report discusses how providers integrate analytics into business strategies and prioritize investment areas across the data continuum to future-proof enterprise data ecosystems.

Chief information and compliance officers

Should read this report to identify providers that ensure seamless AI and ML adoption while improving data integrity and scalability in their information systems. The report highlights providers that embed risk mitigation and governance frameworks, ensuring regulatory and security standards are met.

Data management professionals

Should read this report to understand providers' relative positioning and capabilities in implementing and maintaining compliance and governance standards. The report offers insights into how providers adopt data governance best practices to establish robust frameworks that support enterprise objectives and ensure adherence to data-related regulations.

Technology professionals

Should read this report to understand the value proposition and provider competencies needed to deliver seamless solutions that leverage data, AI and analytics. The report emphasizes the significance of a user-centric approach in developing tailored AI solutions and discusses the importance of interoperability, regulatory data compliance and data security.

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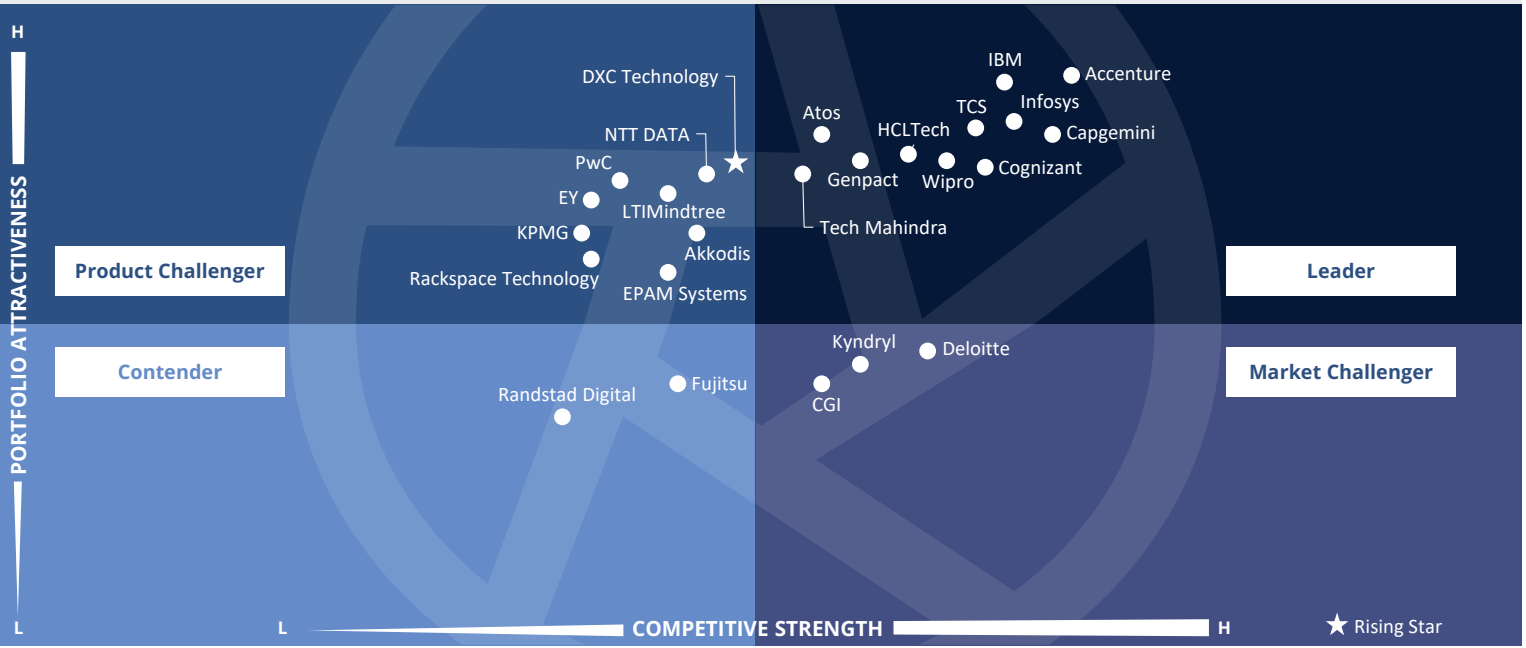
ISG Provider Lens®

Source: ISG RESEARCH

Advanced Analytics and AI Services
Data and Analytics Modernization Services — Large

U.S. 2025



This quadrant assesses large service providers that **modernize their data ecosystems** through **platform-scale architectures, governed pipelines, metadata-driven models and unified data governance**, which strengthens quality, security and compliance.

Gowtham Kumar Sampath

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Definition

In this quadrant, ISG assesses providers in the data and analytics modernization (DAM) services category, offering end-to-end services from migration to management for data and BI ecosystems. This category encompasses engineering, management and governance of data to ensure real-time delivery of high-quality, actionable insights and the implementation of advanced BI tools for creating interactive dashboards.

Providers should offer comprehensive consulting services that include designing scalable data architectures, analyzing data landscapes and managing data lifecycles. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses for centralized data management.

Providers' offerings should include data modeling, data integration, master data management (MDM), metadata management and lineage services. The service portfolio should prioritize data quality, enhance data security and access, and establish governance policies to ensure compliance with regulations.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, road map, and **lifecycle** and **workflow management** to **modernize data estates**
2. Connect disparate data sources, cleanse and transform data, manage **complex data structures, integrate real-time and historical data**, and ensure **data quality**
3. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
4. Integrate systems through APIs, deploy **real-time data solutions**, and establish data lakes and warehouses
5. Build **data hubs, data fabrics and modular data lakes** and have **multicloud data integration capabilities** and access to partner data ecosystems
6. Demonstrate expertise in streamlining change management and improving data delivery through DataOps
7. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
8. Track the complete **data lineage** back to its source to ensure integrity and accuracy throughout its lifecycle
9. **Design and deploy interactive dashboards, reports and visualizations** that effectively communicate complex data insights to both technical and non-technical audiences
10. Provide **ongoing support and training** for the effective use of BI

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Observations

Large providers approached data and analytics modernization in 2025 with a strong foundation in architectural depth and governance maturity. Their modernization strategies consistently emphasize multilayered data fabrics, lakehouse foundations, metadata-driven ingestion, lineage automation and controlled access models that support both operational reporting and advanced AI. DAM is no longer viewed as a migration effort, but rather as the underlying operating environment for enterprise intelligence. This orientation has led to the integration of DataOps, FinOps, semantic modeling, and embedded quality routines across hybrid and multicloud landscapes.

Large providers excel in unifying distributed data ecosystems and reducing fragmentation. Their platforms incorporate domain-oriented data products, standardized ingestion pipelines and cross-domain observability that improve readiness for predictive and generative workloads. Strong partnerships with hyperscalers and ISVs reinforce their ability to deliver modernization at a global scale.

The ongoing challenge lies in translating modernization investments into meaningful business value. Enterprises still face uneven data quality, stewardship gaps and variable semantic adoption across business units. Modernization programs risk being perceived as infrastructure first unless paired with clear consumption pathways and improved data literacy.

In 2025, DAM leadership for large providers will be defined by their ability to shorten time to usable data, strengthen governance adoption and deliver modernization that directly accelerates analytics and AI outcomes.

From the 90 companies assessed for this study, 25 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture expands its modernization suite through lineage-driven governance modules, cross-platform migration playbooks and self-service data orchestration capabilities to improve data visibility, control and business adoption across cloud and hybrid ecosystems.

Atos has expanded its modernization suite with new Snowflake and Databricks accelerators, enhancing schema conversion, observability and data validation workflows to support faster migrations and multicloud alignment across enterprise-scale transformation programs.

Capgemini expands its modernization portfolio through enhanced data mesh and lakehouse architectures, reinforced lineage automation and hybrid cloud orchestration models designed to improve scalability, governance efficiency and interoperability.

Cognizant's portfolio advancements emphasize data mesh standardization within Ignition and enhanced observability modules for hybrid data estates, improving governance traceability and supporting faster integration across data and cloud-native modernization frameworks.

Genpact expands its modernization stack with the Data Quality Factory and PowerMe platforms to strengthen automated lineage tracking, cloud-agnostic pipeline orchestration and federated governance capabilities across large-scale enterprise data environments.

HCLTech has strengthened its modernization offering by enhancing AI Foundry with new lineage intelligence and hybrid pipeline orchestration features, extending data observability and governance consistency across multicloud environments and regulated industry ecosystems.

IBM enhanced its modernization portfolio by expanding data fabric blueprints and integrating governance automation into its Modern Data Accelerators, designed to strengthen observability and quality control across hybrid and multicloud environments.

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Infosys has expanded its automation frameworks for metadata governance, enhanced observability modules within data ingestion pipelines and introduced new reference architectures for DataOps adoption across lakehouse and mesh deployments, supporting multicloud modernization plans.

TCS is expanding its modernization initiatives through data fabric offerings that blend metadata-driven orchestration, model observability and policy automation. Recent updates to its platforms emphasize federated lineage tracking and cross-cloud pipeline scalability.

Tech Mahindra's recent efforts focus on advancing metadata-driven governance and self-service data product marketplaces, supported by automation frameworks that enhance observability, FinOps alignment and multicloud orchestration across complex modernization programs.

Wipro's expansions in platform orchestration, lineage automation and cloud-agnostic data migration frameworks demonstrate its continued evolution toward standardized, intelligent modernization workflows that integrate cost optimization and enhanced observability.

DXC Technology's (Rising Star) modernization initiatives emphasize expanded fabric and multicloud deployments, new lineage and observability modules and unified data governance frameworks that link data quality, metadata and cost optimization across large-scale enterprise environments.

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Leader

"Atos demonstrates strong enterprise data modernization capabilities, combining scalable cloud architecture, mature governance frameworks and lineage-centric design to enable unified, compliant and analytics-ready data ecosystems for data-intensive enterprises."

Gowtham Kumar Sampath

Atos

Overview

Atos Group is headquartered in Bezons, France. It has more than 67,000 employees across 61 countries under two brands — Atos for services and Eviden for products. In FY24, the company generated €9.6 billion in revenue, with erstwhile Tech Foundations as its largest segment. Its modernization approach integrates lakehouse and warehouse frameworks with automated schema conversion and observability capabilities, creating modular, cloud-agnostic ecosystems optimized for performance and compliance. Atos enables organizations to transition from legacy platforms to real-time environments by embedding metadata-driven orchestration, as well as AI-ready data environments.

Strengths

Structured modernization architecture: Atos employs a unified modernization blueprint that blends data lake, warehouse and lakehouse architectures into a cohesive ecosystem. Its modernization toolkits automate ingestion, validation and orchestration to accelerate migration while preserving schema consistency and governance. The metadata-first design enables faster data onboarding and versioned integration across environments, creating a scalable foundation for analytics.

Governance-centric data ecosystem: Atos' governance-led modernization philosophy and data management programs incorporate DAMA-aligned governance models, ensuring policy enforcement, role-based access control and complete lineage tracking. Automated quality and observability frameworks enhance trust in data, enabling enterprises to operationalize governance while maintaining flexibility across hybrid and sovereign environments.

Metadata, lineage and data quality integration: Atos reinforces modernization value by closely integrating metadata cataloging, lineage visualization and quality enforcement. Automated data crawlers and validation frameworks generate transparent audit trails across data types, utilizing a governance-through-lineage model, which strengthens trust in analytics and aligns modernization outcomes with enterprisewide data assurance objectives.

Caution

Atos should deepen data-product federation, standardize user adoption frameworks beyond visualization to boost self-service analytics visibility and clearly reference its mesh/fabric implementations to reinforce modular architecture narratives.

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Data and Analytics Modernization Services — Midsize

This report is valuable for providers offering **data and analytics modernization services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the shifting priorities of enterprises and the enterprises' expectations from providers to empower them with access to analytics through data democratization. It also outlines the opportunities for midsize service providers to accelerate data platform modernization using vertical-aligned data foundations built on deep industry knowledge and domain-centric models.

Chief data officers

Can read this report to gain perspective on providers' analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes. The report provides insights to leverage data assets, integrating analytics into business strategies and prioritizing investment areas across the data continuum to future-proof enterprise data ecosystems.

Chief information and compliance officers

Should read this report to identify providers that ensure seamless AI and ML adoption, with a focus on improving data integrity and scalability in their information systems. The report provides insights into providers that embed risk mitigation and governance frameworks, ensuring alignment with regulatory and security standards.

Data management professionals

Should read this report to understand providers' relative positioning and capabilities to implement and maintain compliance and governance standards. The report offers insights into providers' best practices of data governance, enabling them to establish robust frameworks that support enterprise objectives, ensuring adherence to data-related regulations.

Technology professionals

Should read this report to understand the value proposition and provider competencies needed to deliver seamless solutions that leverage data, AI and analytics. The report emphasizes the significance of a user-centric approach in developing tailored AI solutions and the importance of interoperability, data compliance with industry regulations and data security.

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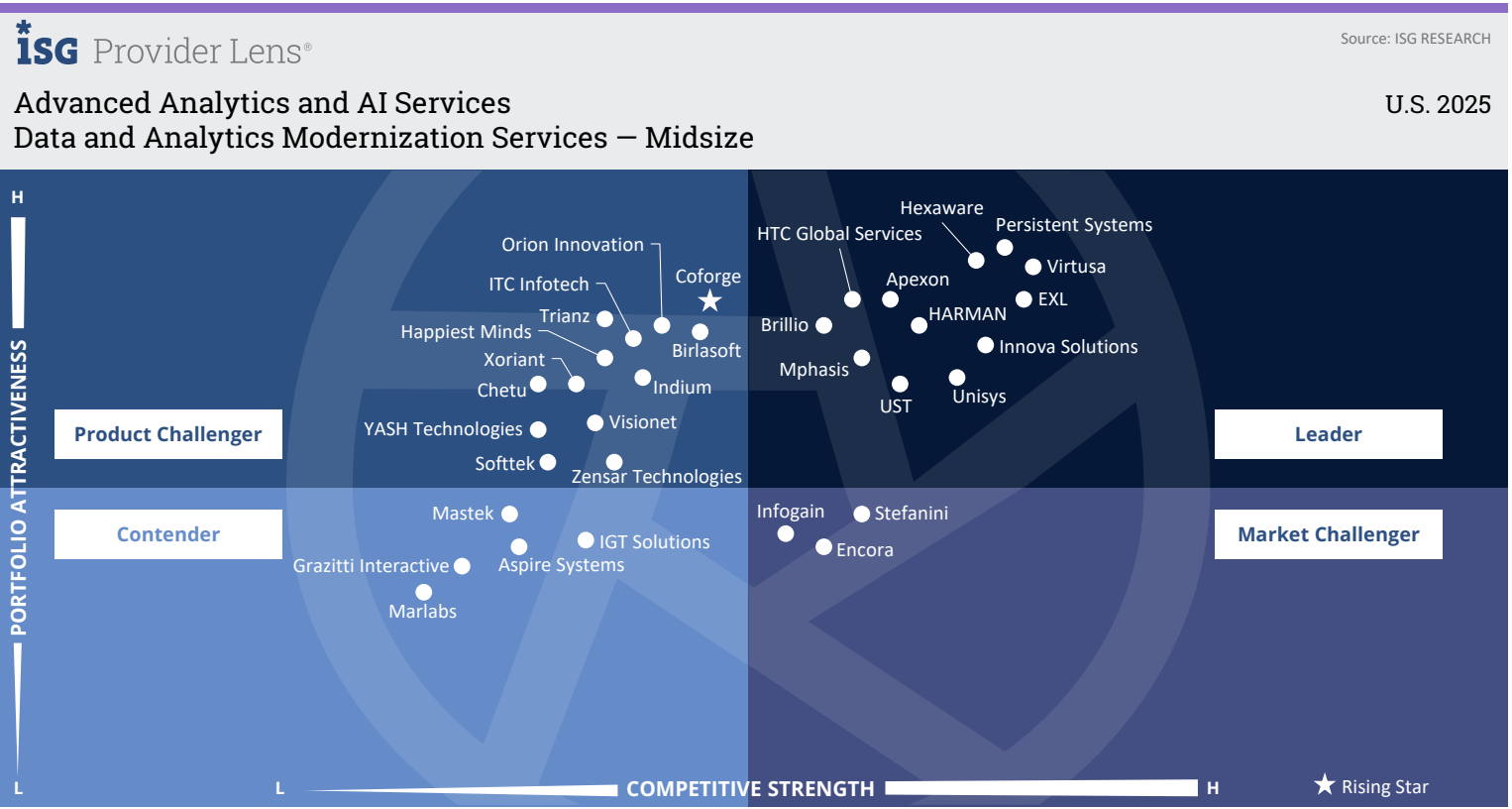

This quadrant assesses midsize service providers that **modernize data ecosystems** through **agile architectures, efficient pipelines, domain-aligned models and governance** practices that enhance data quality, security and regulatory readiness.

Gowtham Kumar Sampath

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Definition

In this quadrant, ISG assesses providers in the data and analytics modernization services category, offering end-to-end services from migration to management for data and BI ecosystems. This category encompasses engineering, management and governance of data to ensure real-time delivery of high-quality, actionable insights and the implementation of advanced BI tools for creating interactive dashboards.

Providers should offer comprehensive consulting services that include designing scalable data architectures, analyzing data landscapes and managing data lifecycles. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses for centralized data management.

Providers' offerings should include data modeling, data integration, master data management (MDM), metadata management and lineage services. The service portfolio should prioritize data quality, enhance data security and access, and establish governance policies to ensure compliance with regulations.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, road map, and **lifecycle** and **workflow management** to **modernize data estates**
2. Connect disparate data sources, cleanse and transform data, manage **complex data structures, integrate real-time and historical data**, and ensure **data quality**
3. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
4. Integrate systems through APIs, deploy **real-time data solutions**, and establish data lakes and warehouses
5. Build **data hubs, data fabrics and modular data lakes** and have **multicloud data integration capabilities** and access to partner data ecosystems
6. Demonstrate expertise in streamlining change management and improving data delivery through DataOps
7. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
8. Track the complete **data lineage** back to its source to ensure integrity and accuracy throughout its lifecycle
9. **Design and deploy interactive dashboards, reports and visualizations** that effectively communicate complex data insights to both technical and non-technical audiences
10. Provide **ongoing support and training** for the effective use of BI

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Observations

In 2025, midsize providers approached data and analytics modernization with practical, accelerator-driven frameworks tailored for clients seeking efficient transformation. Their DAM models emphasize rapid cloud migration, simplified ingestion, curated quality routines and partner-aligned reference architectures for platforms such as Fabric, Snowflake and Databricks. This approach enables midsize firms to deliver modernization at a lower cost and in faster cycles, appealing to organizations with limited governance maturity or constrained IT capacity.

A distinctive strength is their ability to embed vertical relevance within modernization patterns. Many midsize providers integrate domain-aligned data models, semantic structures and consumption layers directly into DAM blueprints, ensuring that analytics activation follows closely after foundational modernization. Packaged program structures that combine assessment, migration, cleansing and enablement help accelerate adoption.

Their limitations emerge with enterprisewide scale. Complete DAM programs require cross-domain metadata stewardship, centralized governance, lineage automation and consistent observability, which midsize providers may not uniformly support. Programs sometimes struggle to articulate long-term business value beyond foundational uplift.

In 2025, midsize DAM leadership will rely on expanding governance maturity, clarifying value realization pathways and strengthening observability across domains, while maintaining the agility and cost efficiency that differentiate them.

From the 90 companies assessed for this study, 33 qualified for this quadrant, with 12 being Leaders and one Rising Star.

Apexon

Apexon is expanding accelerator coverage for schema conversion and pipeline validation, adding lineage-first documentation that tracks code changes and introducing orchestration modules that coordinate BI refresh, access controls and service windows.

Brillio

Brillio continues to expand its modernization portfolio through integrated data engineering frameworks that link ingestion, quality and observability, while embedding governance controls and lineage tracking across multicloud data estates.

EXL

EXL expands through multiagent data engineering, metadata-driven lineage automation and workflow orchestration, connecting its Code Harbor and Data Harbor platforms with governed catalog integration to improve transformation consistency and audit transparency.

HARMAN

HARMAN is expanding through automation-led engineering and integrated governance frameworks, introducing standardized DataOps accelerators and multienvironment orchestration to improve consistency across migration, quality and lineage processes.

HEXAWARE

Hexaware expands its data modernization portfolio through automation within its Amaze platform, integrating metadata-driven ingestion, lineage automation and prebuilt orchestration for multicloud environments, along with the inclusion of observability and cost-governance modules.

HTC Global Services

HTC Global Services refines its modernization delivery through metadata-driven data pipelines, enhanced restartability and expanded audit dashboards, ensuring consistent visibility and efficiency across multiregion environments while maintaining governance alignment.

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Innova Solutions

Innova Solutions continues to advance its modernization portfolio through the expanded use of automation accelerators, multicloud migration frameworks and governance-focused data engineering practices, which improve pipeline stability, data quality and operational control.

Mphasis

Mphasis modernizes data estates onto Snowflake and AWS with phased migration road maps, ETL retrofit and incremental synchronization. Its *Next-Gen Data* approach highlights a Cognitive Mesh cloud ecosystem and industry plays, supported by partnership depth.

Persistent

Persistent Systems expands its modernization portfolio with agentic lineage frameworks, embedded observability and modular pipelines that unify structured and unstructured sources across business-aligned ingestion, transformation and compliance validation layers.

Unisys

Unisys advances its data modernization portfolio by strengthening tenant-hosted data architectures and semantic layer integration, which unify governance, observability and applied AI capabilities across hybrid environments, supporting data reliability and compliance.

UST

UST has expanded its data modernization capabilities by embedding analytics orchestration, telemetry governance and memory-aware agent integration into its delivery platforms, enabling structured modernization across infrastructure-rich verticals.

Virtusa

Virtusa has enhanced its modernization platform with integrated dataset validation and orchestration workflows through Helio Data Studio, enabling controlled preprocessing, label quality evaluation and structured prompt conditioning across its AI delivery lifecycle.

Coforge

Coforge (Rising Star) has expanded its modernization delivery model through the 6+2 framework and Data Express suite, combining appliance migration, report rationalization and AI-driven data quality improvements into production-ready modernization programs.

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Appendix

The ISG Provider Lens® 2025 – Advanced Analytics and AI Services – Large and Midsize study analyzes the relevant software vendors/ service providers in the U.S. 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 November 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 ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Advanced Analytics and AI Services – Large and Midsize market
2. Use of questionnaire-based surveys of service providers/ vendor 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 & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & 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

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Gowtham Sampath is a Senior Manager with ISG Research, responsible for authoring ISG Provider Lens® quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices. In his role, he also works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries.

He is also authoring thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience, as well as the impact of data analytics across different industry verticals.

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Saravanan M S is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens® studies on Advanced Analytics & AI Services and Specialty Analytics Services featuring Retail, Supply Chain, Life Sciences and Healthcare verticals. In this role, he aids the lead analysts in the research process and is the author of the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

Saravanan has eight years of experience and expertise in technology, business and market research and has been associated with technology research firms specializing in sales and talent strategies across industries. He has also spearheaded end-to-end research and consulting projects for global system integrators and enterprise clients.

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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.

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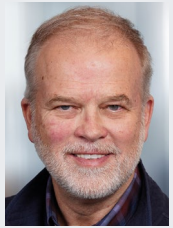

Jan Erik Aase
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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends 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 research director, principal analyst 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.

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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.

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REPORT: ADVANCED ANALYTICS AND AI SERVICES – LARGE AND MIDSIZE

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