ISG Provider Lens®

Advanced Analytics and AI Services — Large and Midsize

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange Business

QUADRANT REPORT | DECEMBER 2025 | EUROPE

Table of Contents

Report Author: Saravanan M S

Convergence of modern data platforms, unified governance and adaptive systems is reshaping enterprise AI adoption

The European data analytics and AI market is entering a phase of accelerated adoption, fueled by technological innovation and evolving regulatory frameworks. This evolution is shaped by a distinctive blend of data sovereignty requirements, ethical AI principles and robust governance models. The growing emphasis on regulatory alignment, especially with the EU AI Act, EU Data Act, data localization considerations and sovereign cloud mandates, sets a strong foundation for responsible and sustainable innovation across the region.

European enterprises face an array of challenges due to economic uncertainties, supply chain volatility, talent shortages and sustainability pressures. These dynamics are compelling business leaders to seek data-driven agility and business growth, harnessing the power of data and AI. From using predictive analytics for manufacturing, deploying AI-driven risk detection models for banking compliance and integrating customer behavior analytics with GenAI models for hyperpersonalized engagement, the shift toward analytics and AI becoming the backbone for cohesive business enablement is evident across the market.

How the market has evolved and why it matters

Over the past 12 months, the European data analytics and AI landscape has undergone a significant transformation. Enterprises are in a phase of rational adoption driven by strategic clarity and value-driven focus through production-grade AI initiatives, moving beyond hype and disillusionment. The incorporation of AI-driven perspectives has led to several notable shifts in organizational management, such as:

- The transition from concentrated AI solutioning to enterprise-wide adoption and embedding AI as a core functionality drives planning, operations, customer engagement and innovation.

Connected AI ecosystems necessitate unified, trustworthy and **decision-grade data estates.**

- Increased emphasis on context-aware AI systems enables data interpretation in situational and domain-specific contexts that are adaptive and nuanced to incorporate behavioral and operational context and local regulations.
- Rise in the adoption of GenAI-integrated enterprise applications enables intuitive and personalized user interactions, democratizing access to analytics and fostering a data-literate culture.
- Intelligent agents capable of self-learning and autonomously orchestrating tasks with minimal supervision help in the shift from decision-support and augmentation to adaptive, autonomous systems.

ISG has identified some of the key challenges enterprises face with analytics and AI initiatives. Some of them include:

Business alignment gaps, cost overruns and ROI realization: Enterprises are moving beyond the early phase of PoC experimentations, where business alignment and ROI realization often lag. This move emphasizes the importance of value realization frameworks that focus on measurable impact, stakeholder alignment and continuous value delivery, ensuring AI investments translate into tangible business outcomes.

Data readiness, quality and lineage: Many enterprises struggle with fragmented data architectures, leading to inconsistent data quality and low trust in analytics outputs. The absence of a single source of truth (SSOT) has amplified challenges related to data trust and reliability. Without consistent metadata management, lineage tracking, and automated quality checks, enterprises face persistent uncertainty about the relevance of datasets that are fit for specific AI consumption. As data volumes continue to grow exponentially, the need for proactive monitoring solutions has become increasingly critical to ensure data reliability, transparency and reusability.

Sovereignty, data localization and compliance: Operating in one of the most stringent data environments in the world, enterprises in Europe must navigate complex requirements surrounding data sovereignty, localization and compliance. This includes adhering to the EU AI Act, EU Data Act, GDPR and data localization laws, ensuring data processing, model training and AI decisioning align with ethical standards and compelling enterprises to invest in sovereign cloud architectures and localized data strategies to ensure compliance while maintaining agility and innovation.

Model risk and trust in AI decisions: As AI models become more complex and get embedded in decision-making, enterprises grapple with model risk, explainability and AI adoption challenges. More often, there is a lack of transparency around model behavior, bias and fairness that continues to erode stakeholder trust in AI-driven outcomes.

Shift in data governance from compliance to innovation enablement: Data governance in Europe is undergoing a paradigm shift, from being a compliance-centric function to repositioning governance as a catalyst for data discoverability and democratization. Enterprises are prioritizing active metadata management and automated governance workflows to deliver contextual visibility and transparency across the data estate.

Change management: While enterprises have made significant investments in next-gen technology data and AI platforms and tools, many still struggle to translate these capabilities into sustained business transformation, largely due to organizational resistance, unclear ownership and lack of stakeholder buy-in.

Catalysts driving market momentum and growth:

Unifying data for connected decision intelligence

European enterprises are prioritizing modernizing their data estates, transitioning from siloed architectures to modern data fabric and mesh frameworks. These advanced architectures enable the democratization of access to trusted, high-quality data, which is essential for scaling AI and analytics across the organization. With current market dynamics, prompt decision-making demands connected intelligence integrating data from diverse domains such as supply chain, CX, operations and finance.

This convergence empowers enterprises to drive strategic outcomes and unlock business value.

Fusion AI: blending traditional ML, cognitive AI and contextual depth

The convergence of forecasting, modeling and simulation techniques with deep learning, computer vision and agentic AI has given rise to a strategic approach that unlocks new dimensions of automation, decision intelligence and contextual adaptability. Enterprises are increasingly shifting toward specialized AI solutions that reflect nuances of their sectoral challenges and regulatory environments, creating new opportunities for coinnovation between enterprises and service providers.

Democratization of data and AI

Enterprises have started to realize that true value from data and AI is realized not when it is confined to technical teams, but when business users can access, understand and act upon AI-driven insights seamlessly. The focus has shifted to building trusted, governed and user-friendly data environments that empower non-technical users through self-service analytics, natural language querying and embedded AI features. European organizations are also embedding governance, transparency and ethical AI principles into democratization initiatives to ensure accountability.

Holistic solutions for enterprise needs

Chief data and AI officers are seeking integrated, future-ready solution architectures that unify data, analytics and AI into a cohesive ecosystem, emphasizing interoperability, governance and trust across the data and ML lifecycle. Providers are addressing this need with offerings that are part of a holistic approach to solving enterprise challenges, enabling faster value realization and seamless adoption across enterprise functions.

AI Factory as a service

Service providers are increasingly positioning the AI Factory model as the strategic blueprint for operationalizing AI across enterprises. As enterprises move toward a state of continuous AI production, this model integrates every stage of the ML lifecycle, from data ingestion and feature engineering to model development, deployment, monitoring and retraining, and develops automated AI supply chains that embed governance, trust, lineage and feedback mechanisms. Providers have developed prebuilt reusable templates, frameworks and domain-specific solutions, enabling clients to rapidly adapt the AI Factory to specific industry contexts.

Intelligent data core

Service providers are architecting unified data platforms and AI-ready infrastructures that seamlessly integrate data mesh, data fabric and governance frameworks to ensure scalability, interoperability and real-time intelligence. Leveraging AI-enabled data engineering and self-healing pipelines, these intelligent data cores support the full spectrum of AI workloads, including model training, inferencing and deployment. Providers implement scalable compute environments, optimized storage solutions and MLOps pipelines to streamline the model lifecycle and enable continuous improvement.

Edge computing for real-time analytics

To address the demand for low-latency decision-making, service providers are developing edge computing frameworks that integrate on-device processing, IoT data and cloud orchestration. This hybrid approach minimizes latency and improves responsiveness, while enabling near-instant insights from sensors, machines and connected assets. Providers are also developing event-driven architectures and deploying industrialized edge AI solutions tailored to specific contexts such as manufacturing, retail, energy, utilities and healthcare.

Next-gen AI for adaptive intelligence and actions

Service providers are investing in self-learning models and vision AI-based and autonomous intelligence solutions that converge computer vision, deep learning, knowledge graphs and agentic AI. With a strong focus on responsible AI, contextual reasoning and continuous learning, service providers are enabling enterprises to strategically orchestrate adaptive ecosystems, driving them toward real-time, self-evolving and value-centric transformation.

AI as a strategic copilot

Rapid innovation across autonomous AI technologies has pushed service providers to position AI as a strategic copilot to augment human decision-making, operational foresight and business adaptability. Service providers are infusing AI into business workflows across functions, combining deep learning, ML and agentic AI to contextualize data, simulate scenarios and guide actions. This helps enterprises transition toward proactive, insight-driven enterprises.

Ecosystem for shared value creation and continuous innovation

To foster innovation and solution development, service providers are forging partnerships with clients, hyperscalers, data cloud platforms, BI tool vendors, AI ISVs and academia to establish coinnovation labs. These labs act as agile sandboxes for rapid prototyping, experimentation and validation of AI models that integrate domain expertise, data engineering and next-gen AI to drive faster time to value and industry relevance.

Citizen enablement

To ensure broad-based participation and consumption of AI and analytics, service providers are designing frameworks and training programs that enable business users to harness AI responsibly and effectively. They are implementing data mesh, data fabric and semantic layer architectures to decentralize data ownership and embed natural language interfaces and GenAI assistants within analytics workflows, unlocking the potential of human-AI collaboration.

To sustain leadership momentum and address evolving enterprise needs, service providers in the data analytics and AI market are constantly investing to enhance their portfolios and integrating AI across their offerings. While enterprises have recognized that the cognizance of data foundations is essential for AI programs, they are increasing their focus on the upgradation of data estates. Providers will continue to play a pivotal role in modernizing enterprise data ecosystems, navigating the market dynamics with next-gen AI technologies and solutions.

Notes on quadrant positioning: This study assessed several analytics and AI service providers offering similar portfolio attractiveness in most quadrants. This reflects the relative maturity of the market, providers and offerings. The vertical axis positioning in each quadrant reflects ISG's analysis of how well the offerings align with the full scope of enterprise needs. The market has also been segmented into large and midsize providers to eliminate any bias and differences arising from scale while emphasizing that it does not diminish innovation, capabilities or offerings. It also reflects providers' strategy to align their portfolio and offerings to suit market demand and enterprise needs.

As AI adoption scales across enterprises, data maturity emerges as a critical success factor, shaping the entire lifecycle from model performance to stakeholder trust in AI-driven decisions. To support this shift, providers must prioritize initiatives that build organizational confidence and transparency through AI literacy programs that include establishing validation councils and deploying explainability dashboards that demystify model outputs.

Provider Positioning

Page 1 of 6

	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
adesso SE	Not In	Market Challenger	Not In	Market Challenger
Akkodis	Product Challenger	Not In	Product Challenger	Not In
AND Digital	Not In	Contender	Not In	Contender
Atos	Leader	Not In	Leader	Not In
Avenga	Not In	Rising Star ★	Not In	Rising Star ★
Aventra Group	Not In	Product Challenger	Not In	Product Challenger
Birlasoft	Not In	Product Challenger	Not In	Product Challenger
Capgemini	Leader	Not In	Leader	Not In
CGI	Contender	Not In	Market Challenger	Not In

Provider Positioning

Page 2 of 6

	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	Product Challenger	Not In	Product Challenger
Cognizant	Leader	Not In	Leader	Not In
Deloitte	Market Challenger	Not In	Market Challenger	Not In
doubleSlash	Not In	Contender	Not In	Contender
DXC Technology	Rising Star ★	Not In	Rising Star ★	Not In
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
Genpact	Product Challenger	Not In	Product Challenger	Not In
GFT	Not In	Leader	Not In	Leader

Provider Positioning

Page 3 of 6

	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
HARMAN	Not In	Leader	Not In	Leader
HCLTech	Leader	Not In	Leader	Not In
Hexaware	Not In	Not In	Not In	Leader
IBM	Leader	Not In	Leader	Not In
Infosys	Leader	Not In	Leader	Not In
ITC Infotech	Not In	Product Challenger	Not In	Product Challenger
it-novum	Not In	Contender	Not In	Contender
Keyrus	Not In	Market Challenger	Not In	Market Challenger
KPMG	Product Challenger	Not In	Product Challenger	Not In
Kyndryl	Contender	Not In	Contender	Not In

Provider Positioning

Page 4 of 6

	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In
Merkle	Not In	Leader	Not In	Leader
Movate	Not In	Product Challenger	Not In	Contender
Mphasis	Not In	Leader	Not In	Leader
NTT DATA	Product Challenger	Not In	Product Challenger	Not In
OPITZ CONSULTING	Not In	Contender	Not In	Contender
Orange Business	Leader	Not In	Leader	Not In
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

Provider Positioning

Page 5 of 6

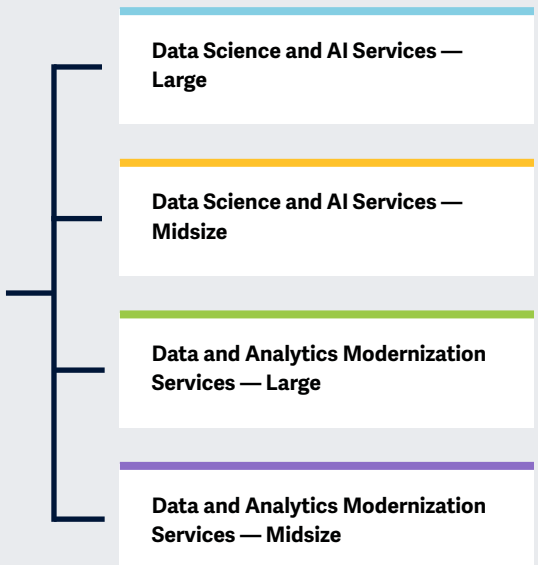
	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Randstad Digital	Contender	Not In	Contender	Not In
Reply	Leader	Not In	Leader	Not In
Sopra Steria	Market Challenger	Not In	Market Challenger	Not In
Stefanini	Not In	Leader	Not In	Market Challenger
TCS	Leader	Not In	Leader	Not In
Tech Mahindra	Product Challenger	Not In	Product Challenger	Not In
TP	Product Challenger	Not In	Not In	Not In
T-Systems	Leader	Not In	Leader	Not In
Unisys	Not In	Leader	Not In	Leader
Valcon	Not In	Product Challenger	Not In	Product Challenger

Provider Positioning

Page 6 of 6

	Data Science and AI Services — Large	Data Science and AI Services — Midsize	Data and Analytics Modernization Services — Large	Data and Analytics Modernization Services — Midsize
Virtusa	Not In	Leader	Not In	Leader
Vivicta	Contender	Not In	Contender	Not In
Wavestone	Not In	Market Challenger	Not In	Market Challenger
Wipro	Leader	Not In	Leader	Not In
Xebia	Not In	Product Challenger	Not In	Product Challenger
Zensar Technologies	Not In	Contender	Not In	Product Challenger

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



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.

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, 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 Europe market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midsize 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 multiple verticals, 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).

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.

Data Science and AI Services — Large

Who Should Read This Section

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

In this quadrant, ISG highlights the evolving demands of enterprises and outlines the opportunities for large service providers to assess data and AI readiness, drive their analytics maturity and accelerate AI adoption by operationalizing bespoke AI programs. The report emphasizes the need for enterprises to augment decision-making through AI-led recommendations, yielding quantifiable business outcomes across various functions and business workflows.

Chief data and AI officers

Should use this report to seek providers that can help develop data and AI 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

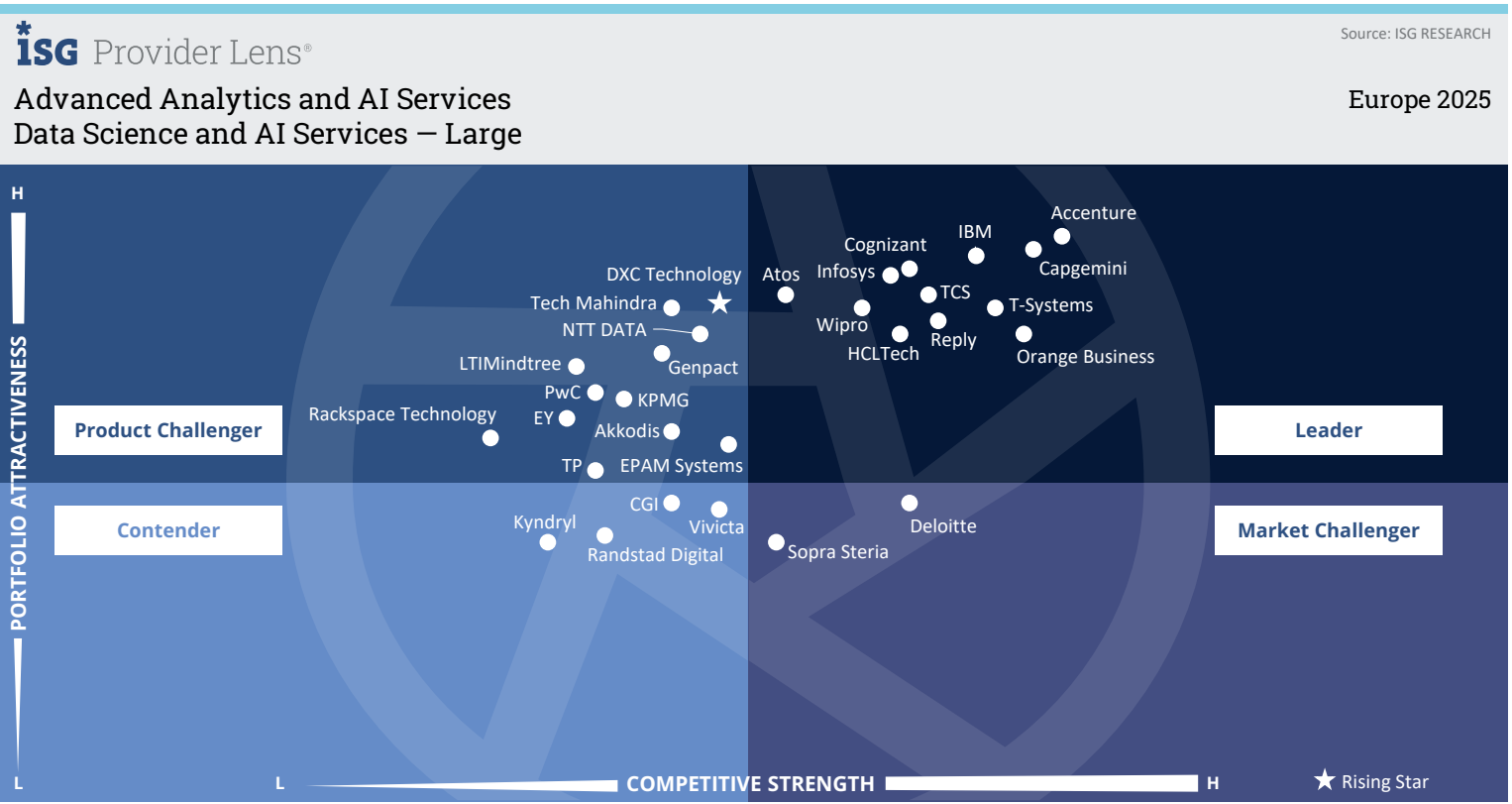
Should read this report to identify providers that ensure seamless adoption of AI and ML, with a focus on improving data integrity and scalability in their information systems. The report also provides insights into providers that embed risk mitigation and governance frameworks into AI and ML deployments, 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 provides insights into how providers are helping businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.

Strategy professionals

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



This quadrant assesses large service providers **skilled in scientific techniques** and **advanced technologies, such as AI and ML**, helping large enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Saravanan M S

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

Observations

Large providers in Europe are leveraging their comprehensive cross-industry expertise, forward-looking approach and delivery maturity to scale enterprise AI programs. Their end-to-end AI transformation road maps enable enterprises to embed contextualized intelligence across industry-specific value chains by integrating applied AI capabilities, such as computer vision, agentic AI and knowledge graphs supported by robust MLOps, governance and ethical AI frameworks.

Large providers are making sustained investments in developing proprietary frameworks, accelerators and model libraries to streamline the deployment of data and AI-driven solutions and improve the time to realize business impact. They have developed several modular and verticalized prebuilt solutions for various use cases, including customer analytics, predictive maintenance, risk analytics, clinical trials and scenario experimentation, that also comply with data sovereignty standards.

Partnerships form a key pillar of large providers' strategy. They are strengthening collaborations with hyperscalers, cloud data platforms and AI ISVs to build interoperable, cloud-agnostic solutions while engaging with academic and industry consortia to develop open innovation ecosystems.

Large providers have also established innovation centers and AI labs to codevelop and operationalize domain-centric AI solutions along with clients. By offering scale, niche AI expertise and ecosystem collaboration, these providers are positioning themselves as trusted orchestrators of enterprise-wide AI transformation, intersecting innovation, regulatory compliance and operational excellence.

From the 95 companies assessed for this study, 30 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture's comprehensive set of AI offerings that span from consulting to industry-specific solutions, with a emphasis on responsible AI practices, enables enterprises in decision-making and move toward decision autonomy.

Atos

Atos adopts a structured six-phase approach for AI deployments, beginning with discovery and business alignment to use case prioritization and development. This approach ensures continuous monitoring, governance and value realization throughout the lifecycle.

Capgemini

Capgemini's deep ecosystem partnerships with Google Cloud, NVIDIA, SAP and Mistral AI accelerate the development of GenAI and agentic AI solutions tailored for multiple industries, including the regulated ones.

cognizant

Cognizant's modular and scalable solutions enable enterprises to progressively adopt advanced analytics and AI capabilities and realize measurable business outcomes and ROI.

HCLTech

HCLTech prioritizes ethical, responsible AI solution development, using automated tools to embed governance controls across the lifecycle, ensuring traceability and compliance with standards.

IBM

IBM's advancements in data science and AI services are driven by sustained investments in its global innovation hubs, which focus on next-gen AI such as agentic AI and quantum computing.

Infosys' deep domain expertise and innovative AI capabilities deliver substantial business value to clients through a combination of specialized engineering, functional and industry solutions.

Orange Business' domain specialists, GenAI capabilities and partner ecosystem deliver AI-driven value for enterprises and transform their business outcomes with agility and precision.

Reply's end-to-end approach ensures seamless integration of AI into business ecosystems, enabling enterprises to unlock value from data, automate processes and scale innovation.

TCS WisdomNext™ 2.0, built on NVIDIA's validated enterprise AI factory design, acts as a cornerstone for operationalizing agentic AI solutions, shortening the ideation-to-execution cycle with modular blueprints and providing a unified environment for building, managing and scaling AI factories.

T-Systems adopts an end-to-end delivery model, from strategy to MLOps and continuous monitoring. It also enables enterprises to transition from PoCs to production-scale deployments while aligning with their strategic goals.

Wipro's WeGA Studio and AI Platform accelerate ML model training and deployment, delivering industry-specific and contextual models that enable rapid transition from experimentation to enterprise-scale adoption.

DXC Technology (Rising Star) emphasizes human-centric and ethical design principles in conceptualizing AI solutions, enabling their responsible deployment across industries and ensuring governance, model explainability and user empowerment.

Leader

"Orange Business leverages its end-to-end AI capabilities and domain expertise to offer ethical, responsible and trusted AI solutions that enhance decision-making across enterprise functions."

Saravanan M S

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. It prioritizes the integration of IT, data and business as the foundation of a value proposition. From data strategy, data governance, architecture, coding and specialized data services to data visualization, Orange Business offers a comprehensive range of data and analytics services that contribute to a successful digital transformation journey.

Strengths

Energy optimization: Orange Business utilizes AI-powered data modeling and classification algorithms that analyze real-time data on network antenna performance, traffic patterns and environmental factors to enhance energy efficiency across network infrastructure. This capability reduces operational costs for telecom operators and also supports sustainability goals by minimizing carbon footprints.

Operationalizing applied AI innovation: Orange Business leverages NLP and deep learning text mining methods to extract value from unstructured data from safety reports. This process enables access to key information that facilitates the development of new use studies. The company utilizes computer vision for various sustainability projects. For instance, in coral reef restoration, it helps identify coral health, growth patterns and ecosystem resilience.

Trust-centered GenAI platform: Orange Business' multidomain Live Intelligence platform is built with a focus on transparency, explainability and security. The platform empowers enterprises to safely adopt GenAI use cases ranging from real-time decision support to knowledge discovery and customer engagement, while emphasizing trust in governance and openness in ecosystem integration.

Caution

Orange Business should prioritize developing and productizing industry-specific tools, accelerators and ready-to-deploy solutions to expedite AI implementation, delivering a seamless experience for clients.

Data Science and AI Services — Midsize

Who Should Read This Section

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

In this quadrant, ISG highlights midsize providers with deep competence in targeted industries such as BFSI, healthcare, retail and manufacturing to drive AI initiatives for enterprises. The report emphasizes the need for enterprises to capitalize on data-driven business decisions by leveraging providers' industry-specific capabilities.

Chief data and AI officers

Should read this report to identify providers that can help build effective data strategies, ensuring 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

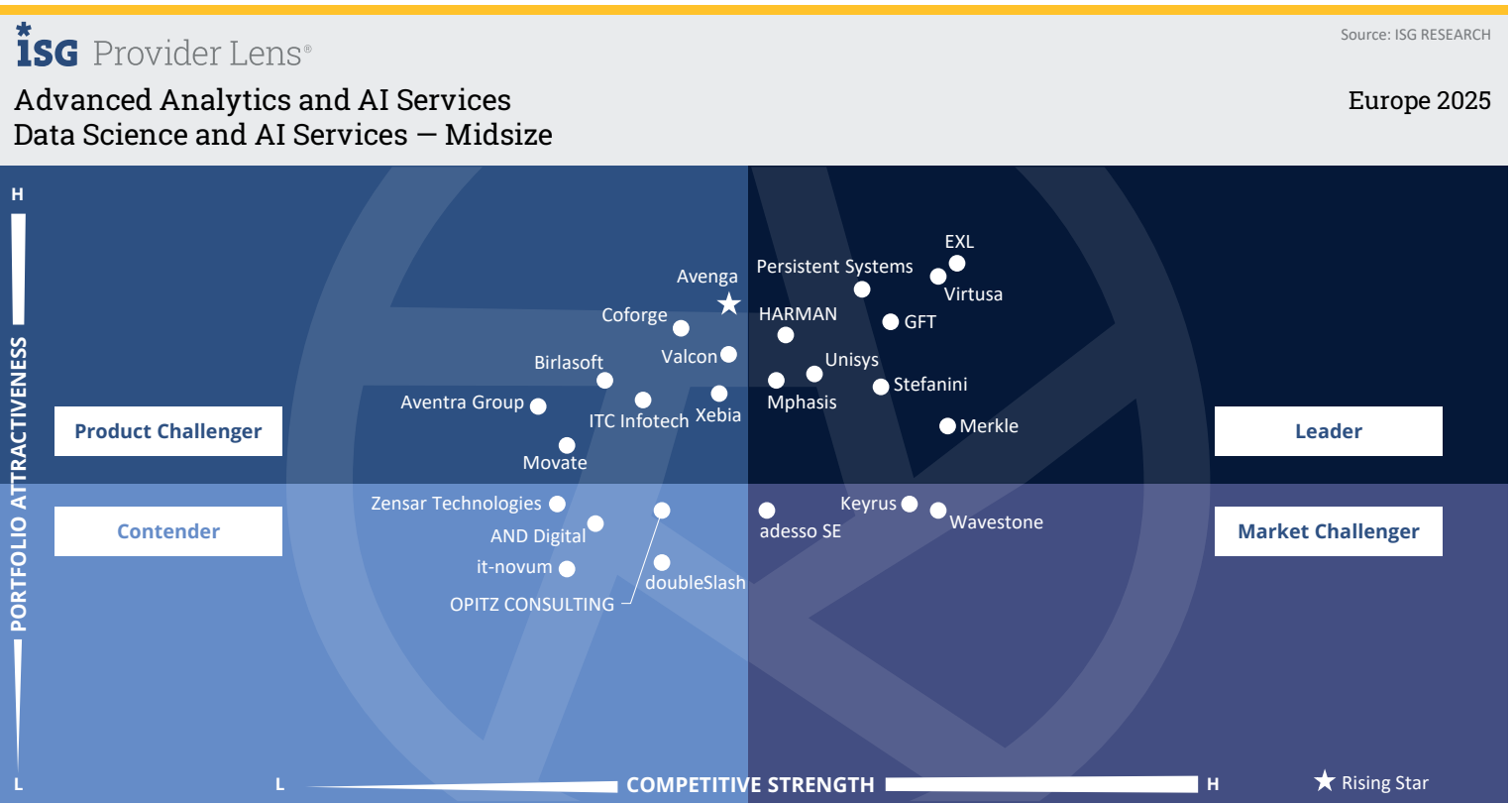
Should read this report to identify providers that ensure seamless adoption of AI and ML, with a focus on improving data integrity and scalability in their information systems. The report also provides insights into providers that embed risk mitigation and governance frameworks into AI and ML deployments, 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 provides insights into how providers are helping businesses leverage AI to drive innovation, develop tailored offerings and stay ahead of market trends.

Strategy professionals

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



This quadrant assesses midsize service providers **skilled** in **scientific techniques** and **advanced technologies, such as AI and ML**, helping enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Saravanan M S

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

Observations

Midsize providers in Europe are emerging as innovation-driven partners for enterprises seeking focused, outcome-oriented AI solutions. They differentiate themselves through specialization into select verticals and transform AI engagements through a consulting-led approach that balances agility with precision. Their highly verticalized AI solutions tailored to focus on industries such as banking and financial services, healthcare and retail demonstrate their deep domain expertise and addressing contextual nuances and business challenges.

Midsize providers focus on delivering full-stack AI solution modeling within intellectual property-led operational frameworks. This approach enables them to provide comprehensive AI lifecycle management services, from data preparation and model development to deployment, monitoring and continuous refinement, for diverse enterprise environments. Their delivery models also emphasize iterative experimentation, rapid prototyping and continuous learning, aligning well with enterprises at various stages of AI maturity. Most providers employ scenario modeling engines to help enterprises anticipate the impact of operational changes before implementation, promoting informed and confident decision-making.

Midsize providers are investing in dedicated AI labs to sustain innovation-led service delivery that serves as collaborative environments for experimentation and cocreation of domain-specific models with clients and partners. Their digital engineering prowess, combined with human-centric design and collaborative engagement models, positions these providers to operationalize AI solutions for sustained innovation and value realization.

From the 95 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one Rising Star.

EXL

EXL delivers domain-led, AI-powered enterprise-grade solutions and manages the entire analytics ML lifecycle, from business problem definition to sustained model performance in production.

GFT

GFT blends deep industry expertise with its AI capabilities to harness the power of data, helping enterprises unlock insights, automate decisions and accelerate innovation at scale.

HARMAN

HARMAN Digital Transformation Solutions' engineering-first approach to AI combines deep expertise with embedded systems integration to build AI-powered ecosystems, ensuring trustworthy outcomes.

Merkle

Merkle's media analytics provide an integrated, cross-channel view of campaign performance, enabling enterprises to optimize spend, refine targeting and drive impact.

Mphasis
The Next Applied

Mphasis' predictive modeling and applied AI capabilities transform enterprise data into actionable intelligence, evolving enterprises into insight-led, adaptive enterprises to accelerate decision-making and scale innovation.

Persistent

Persistent Systems supports the complete data science lifecycle, from ideation to implementation. Its closed-loop approach enables enterprises to drive sustained business improvement, maximize the value of AI investments and maintain trust in predictive outcomes.

stefanini GROUP

Stefanini combines ML, NLP and GenAI to transform complex datasets into actionable insights, driving innovation and and enhancing decision-making.

unisys

Unisys' full-stack AI platform integrates data governance, LLMOps and responsible AI by design to ensure ethical development of solutions. It also supports MLOps practices for automated model retraining and continuous optimization.

Virtusa

Virtusa transforms data into strategic advantage with real-time intelligence that drives efficiency, augments decision-making and elevates customer engagement.

avenga

Avenga (Rising Star) delivers a full spectrum of AI services, from core ML and MLOps to specializations in NLP, computer vision and GenAI, addressing various challenges across domains.

Data and Analytics Modernization Services — Large

Who Should Read This Section

This report is valuable for providers offering **data and analytics modernization services** in **Europe** to understand their market position and for enterprises looking to evaluate these providers.

In this quadrant, ISG highlights the emerging needs of enterprises and outlines the opportunities for large providers to build, manage and govern modern data platforms that serve as a foundation for any analytics and AI programs, promoting a culture of data-centricity.

Enterprises seek to realize the value of data assets and generate actionable insights in real time.

Chief data officers

Can read this report to understand providers' analytics capabilities and how to leverage data assets and ecosystems to deliver business outcomes. The report outlines providers' approach toward governance-by-design across data and analytics pipelines and how to 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 adoption of AI and ML, with a focus on improving data integrity and scalability in their information systems. It also 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 and ensure adherence to data-related regulations.

Technology professionals

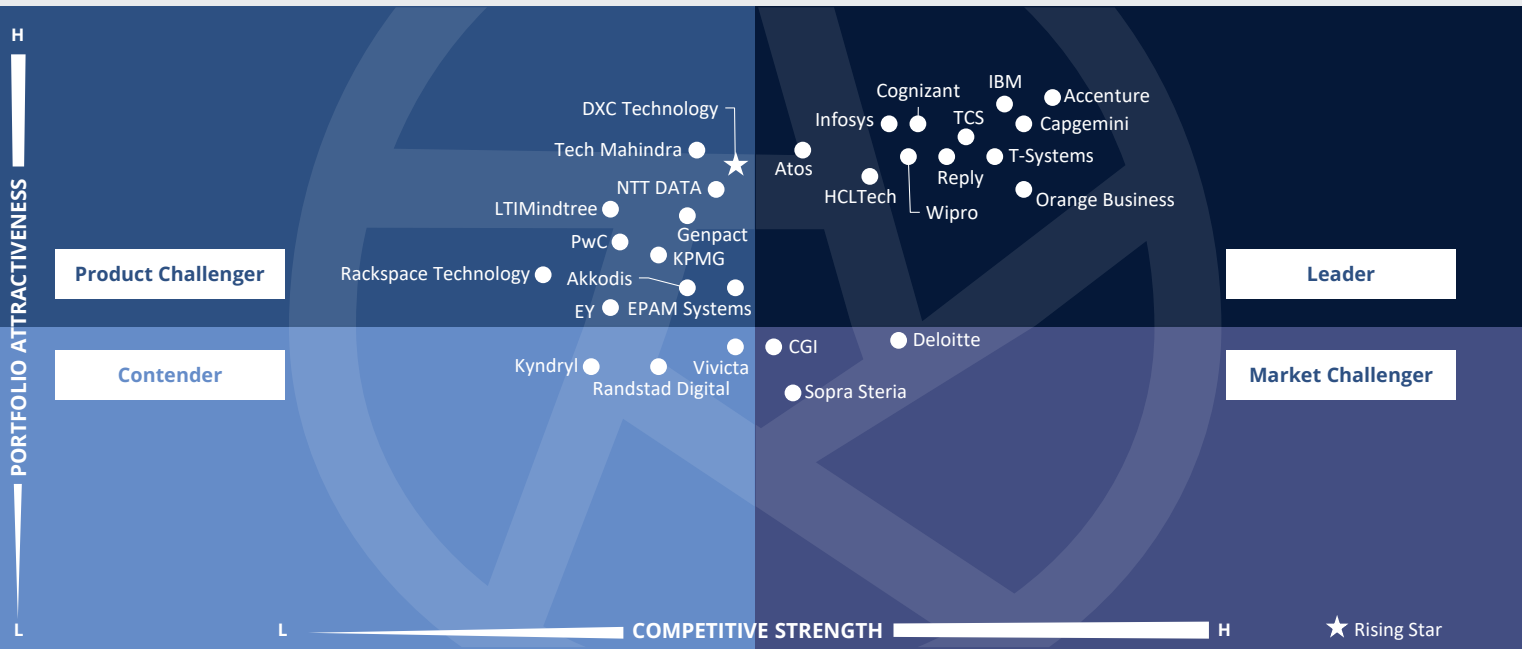
Should read this report to understand the value proposition and provider competencies needed to deliver seamless solutions that leverage data, AI and analytics. The report emphasizes the significance of a user-centric approach in developing tailored AI solutions and highlights the importance of interoperability,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

ISG Provider Lens®

Source: ISG RESEARCH

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

Europe 2025



This quadrant assesses large service providers that **modernize data and BI ecosystems**, including **data architectures,** pipelines and models, and deliver **data governance** that enhances **quality and security** while ensuring regulatory compliance.

Saravanan M S

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

Observations

Large providers in Europe play a pivotal role in modernizing enterprise data estates, unifying fragmented data landscapes and ensuring data and infrastructure readiness for scaling AI initiatives, thereby unlocking the value of enterprise data assets. Their modernization strategies focus on building cloud-native, AI-optimized architectures that enable seamless data flow, interoperability and orchestration across the entire data ecosystem. To accelerate this program, Leaders integrate AI and GenAI technologies throughout the data lifecycle, developing reusable modernization frameworks and accelerators that enable rapid data transformation and democratization of data.

A key differentiator among large providers is their ability to move toward autonomous data transformation with scalable modernization platforms and tools, driving continuous optimization of data pipelines and operations. Large providers are developing advanced data connectivity frameworks to enable real-time data exchange across 5G and edge environments, paving the way for low-latency, distributed analytics. To facilitate scalable modernization, large providers have developed domain-specific data models, which accelerate implementation across core verticals.

Large providers foster a data-centric mindset within enterprises and empower business personas, advancing data democratization by embedding self-service analytics and AI-assisted data cataloging capabilities.

By converging data platform modernization with AI-infused data services and partner ecosystem, the providers help enterprises establish intelligent, adaptive and future-ready data ecosystems that support sustained AI-driven innovation.

From the 95 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture's focus on domain-centricity and scalable data architecture enables clients to transform from fragmented data landscapes into integrated ecosystems, safeguarding trust, compliance and operational resilience.

Atos

Atos guides enterprises throughout their modernization journeys, delivering cloud data platforms and data products that unify data access, governance and analytics, and accelerate data value realization.

Capgemini

Capgemini's innovative Industrialized Data & AI Engineering Acceleration (IDEA) enables clients to modernize and industrialize their data estates, facilitating enterprise-wide data sharing and rapid adoption of AI and analytics for real-time intelligence.

cognizant

Cognizant's data and AI management and governance capabilities ensure effective data stewardship and regulatory compliance supported by dedicated frameworks for master data management (MDM), metadata cataloging, lineage tracking and privacy.

HCLTech

HCLTech's AI Foundry serves as a holistic suite for modernizing data programs and scaling AI initiatives to unlock actionable insights for decision-making. Its verticalized approach helps build governed solutions to drive business value for clients.

IBM

IBM's AI-driven modernization services effectively transform enterprise data environments into modern cloud ecosystems, empowering enterprises to unlock actionable insights for rapid decision-making.

Infosys incorporates AI and GenAI at every facet of data and BI modernization to transform enterprise data environments into future-ready ecosystems, drive innovation and unlock new opportunities for clients.

Orange Business' data observability and risk detection capabilities equip enterprises with complete visibility into the performance of their data systems, resolve anomalies in data flows and ensure data quality, availability and trust.

Reply transforms enterprise data environments through strategic data initiatives and innovative human-centered data products. It translates data into actionable insights to drive decision-making.

TCS modernizes data landscapes to create an AI-ready foundation that accelerates AI initiatives and drives business innovation.

T-Systems integrates advanced data engineering, governance and BI capabilities to modernize data platforms, unlocking data value and providing user-centric dashboards for real-time insights consumption.

Wipro enables enterprises to build resilient, insight-driven data ecosystems that transform legacy data into a strategic asset. It unlocks enterprise intelligence to drive business value.

DXC Technology (Rising Star) drives an end-to-end modernization journey that covers data ingestion, quality, governance, storage and consumption, delivering a single source of truth to support data-driven decision-making.

Leader

"Orange Business fosters a data-driven culture, supporting sustained adoption and business value realization through its modern data platform and delivering value propositions across the data lifecycle."

Saravanan M S

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. It prioritizes the integration of IT, data and business as the foundation of a value proposition. Orange Business offers data governance solutions that enhance data quality, manage data usage, ensure regulatory compliance, protect against unauthorized access, map corporate data with clear metadata management and optimize reference data for consistent utilization in IT and applications.

Strengths

Comprehensive data modernization offerings: Orange Business provides a holistic suite of services covering data culture assessment, data strategy bootcamp, development and deployment of data platforms, including aspects of security and cloud infrastructure. This approach enables enterprises to build a robust data foundation that aligns with business priorities, ensuring governance, compliance and scalability.

Structured delivery frameworks to unlock data value: Orange Business utilizes robust frameworks spanning data architecture, operations and value optimization. Its Architecture Canvas guides enterprises in building scalable cloud data platforms, while the DataOps and FinOps frameworks automate pipeline deployment and standardization and optimize cloud costs, respectively. Additionally, the data governance framework enhances dashboard quality, cataloging and consumption to build trust and drive adoption of analytics.

GenAI-infused services: Orange Business harnesses the power of GenAI in data engineering and dashboarding processes. Its design lab offers a collaborative space for teams to innovate, prototype data visualizations and accelerate dashboard implementation through intuitive and interactive business insights. This infusion of GenAI helps clients move from traditional reporting to context-aware intelligence.

Caution

Orange Business should highlight references that demonstrate its implementation of decentralized data architectures, including data mesh and data fabric, while delivering end-to-end data modernization services to reinforce its positioning in this space.

Data and Analytics Modernization Services — Midsize

Who Should Read This Section

This report is valuable for providers offering **data and analytics modernization services** in **Europe** to understand their market position and for enterprises looking to evaluate these providers.

In this quadrant, ISG highlights the needs of enterprises and outlines the opportunities for midsize providers to accelerate data platform transformations through verticalized data foundations tailored to enterprise requirements, leveraging their deep industry expertise and domain-centric data models. Enterprises seek providers that democratize data and enable different personas to consume analytics across the organization.

Chief data officers

Should read this report to understand providers' analytics capabilities and how to leverage data assets and ecosystems to deliver business outcomes. The report outlines providers' approach toward governance-by-design across data and analytics pipelines and how to integrate analytics into business strategies and prioritize investment areas across the data continuum to future-proof enterprise data ecosystems..

Chief information and compliance officers

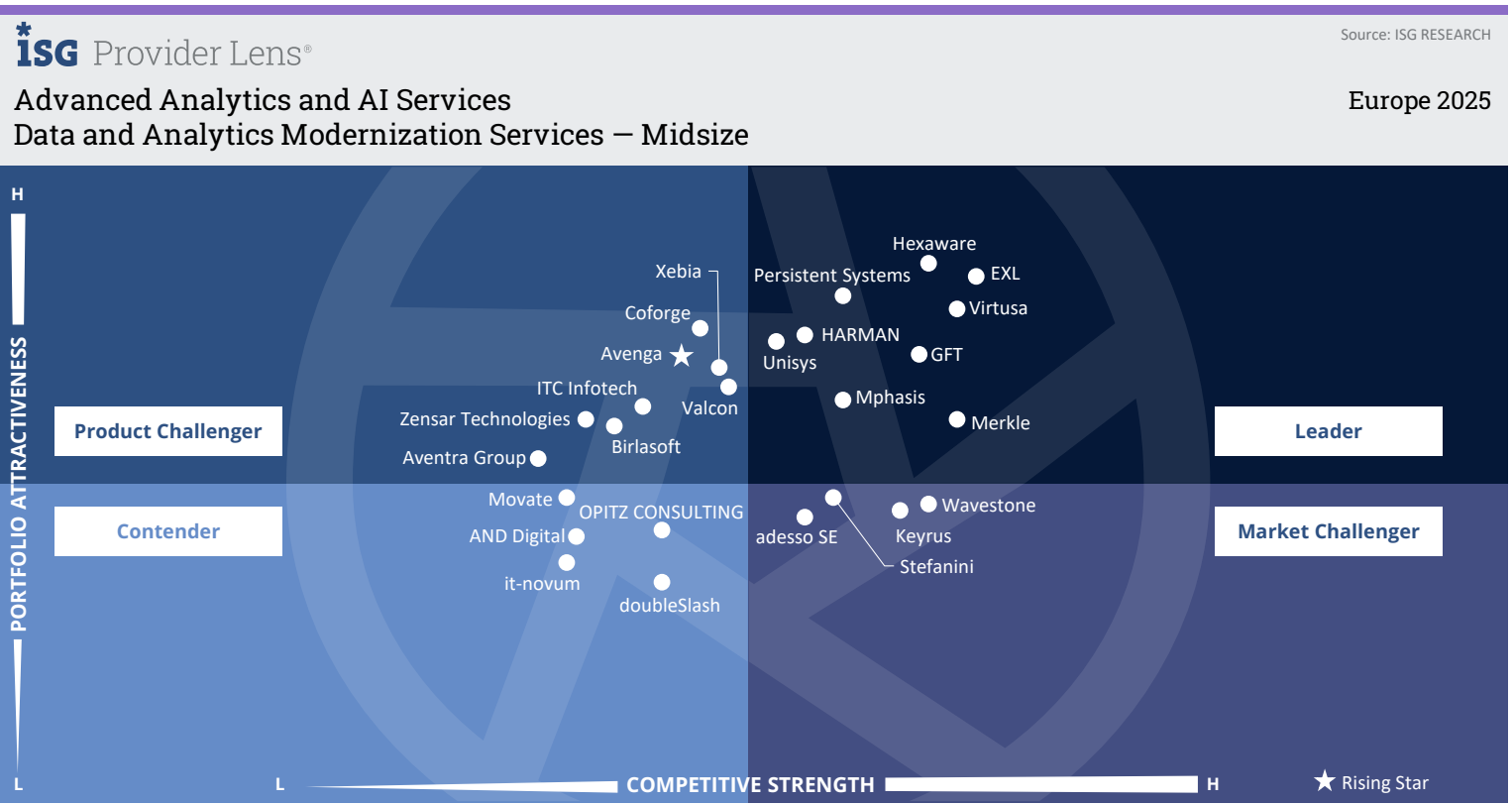
Should read this report to identify providers that ensure seamless adoption of AI and ML, with a focus on improving data integrity and scalability in their information systems. It also provides insights into providers that embed risk mitigation and governance frameworks, ensuring alignment with regulatory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

Data management professionals

Should read this report to understand the relative positioning and capabilities of providers 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 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 importance of a user-centric approach in developing tailored AI solutions and highlights the need for interoperability, regulatory data compliance and data protection.



This quadrant assesses midsize service providers that **modernize data and BI ecosystems**, including **data architectures**, pipelines, models, and deliver **data governance** that enhances quality and security while ensuring regulatory compliance.

Saravanan M S

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

Observations

Midsize providers in Europe are accelerating the transformation of enterprise data environments into modern, AI-ready data ecosystems to drive growth. Their data modernization strategies are centered on transforming legacy data environments into agile, cloud-native platforms designed for real-time analytics. They emphasize interoperability by connecting disparate systems and enable data access across the enterprise. Midsize providers approach modernization through phased programs, prioritize high-value data domains and reduce disruption through incremental and progressive upgrades.

With a strong focus on change management and operational efficiency, midsize providers are increasingly investing in AI- and ML-powered tools to automate end-to-end data modernization workflows, from data discovery, migration to value realization. Providers are also building resilient data pipelines, incorporating observability and enhancing lineage tracking to improve data integrity, reliability and governance.

Midsize providers are increasingly developing scalable IoT and edge platforms that enable real-time data streaming and event-driven decisioning. These providers are embedding GenAI into the data modernization process through copilots to automate repetitive engineering tasks such as code generation, metadata enrichment and documentation, thereby accelerating delivery timelines.

As reliance on data grows, so do the associated risks. Midsize providers place a strong emphasis on ensuring data trustworthiness, localization, security, privacy and adherence to compliance regulations.

From the 95 companies assessed for this study, 26 qualified for this quadrant, with nine being Leaders and one Rising Star.

EXL

EXL's multiagent organizational layer facilitates autonomous, cross-functional governance, delivering enterprise-wide trust, regulatory assurance and real-time operational intelligence.

GFT

GFT's emphasis on data governance, quality and compliance enables enterprises to build trusted data foundations, facilitating data-driven decision-making across multicloud environments.

HARMAN

HARMAN Digital Transformation Solutions modernizes enterprise data landscapes to ensure AI-readiness, empowering organizations to harness data as a strategic asset for driving innovation and operational efficiency.

HEXAWARE

Hexaware's proprietary assets ensure rapid migration, modernization and management of data platforms, delivering actionable insights in real-time. Its partnership with hyperscalers and data cloud vendors to deliver robust, cloud-native solutions.

Merkle

Merkle transforms enterprises with future-ready data platforms that fuel customer engagement, loyalty and growth and are built on the core principles of governance, adaptability and UX.

Mphasis
The Next Applied

Mphasis portfolio spans the entire data lifecycle, covering ingestion, transformation, governance and visualization. Its integrated suite bridges legacy systems with cloud-native architectures, creating an intelligent data foundation ready for AI.

Persistent

Persistent Systems' data governance competency empowers enterprises to align their data strategies with business objectives while advancing the maturity of their data management practices and driving data-led governance.

Unisys' ecosystem of strategic partnerships enhances its ability to modernize data landscapes into future-ready architectures, enabling clients to amplify the value of data and scale AI initiatives.

Virtusa

Virtusa turns modernization into a strategic growth lever by equipping enterprises with the ability to manage diverse workloads efficiently and unlock real-time, actionable insights.

Avenga's (Rising Star) data integration accelerator integrates event-driven and streaming data ingestion techniques to capture near-real-time data changes, ensuring freshness and accuracy.

Appendix

Methodology & Team

The ISG Provider Lens 2025 – Advanced Analytics and AI Services — Large and Midsize study analyzes the relevant service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Namratha Darshan

Lead Author:
Saravanan M S

Editors:
Indrani Raha and Priyanka Richi

Research Analyst:
Saravanan M S

Data Analyst:
Tishya Selvaraj

Consultant Advisor:
Dorotea Baljevic

Project Managers:
Sukanya Nair and Sibin Varghese

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

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

Lead Author and Research Analyst

Saravanan M S

Senior Lead Analyst

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.

Study Sponsor

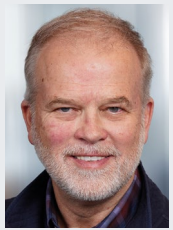
Namratha Darshan

Chief Business Leader

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence. As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services. She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical focused reports for insurance.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

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.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.
ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

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

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

For more information, visit isg-one.com.

ISG Provider Lens®

DECEMBER, 2025

REPORT: ADVANCED ANALYTICS AND AI SERVICES — LARGE AND MIDSIZE