

Generative AI Services

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



Introduction	03	Contacts for this Study	12
About the Study		Advisor Involvement	
Quadrants Research	05	Advisor Involvement – Program	
Definition	06	Description	13
Quadrants by Regions	08	Advisory Team	13
Schedule	09		
Client Feedback Nominations	10	Invited Companies	14
Methodology & Team	11	About our Company & Research	17

GenAI is redefining the enterprise technology landscape in 2026, evolving from experimentation to scaled, value-driven transformation. It now serves as a strategic enabler of intelligent enterprises, reshaping operations and accelerating innovation cycles. Today, GenAI powers not only text, code, images and video but also autonomous workflows, decision intelligence and hyperpersonalized customer experiences across industries.

Key trends shaping GenAI investments include:

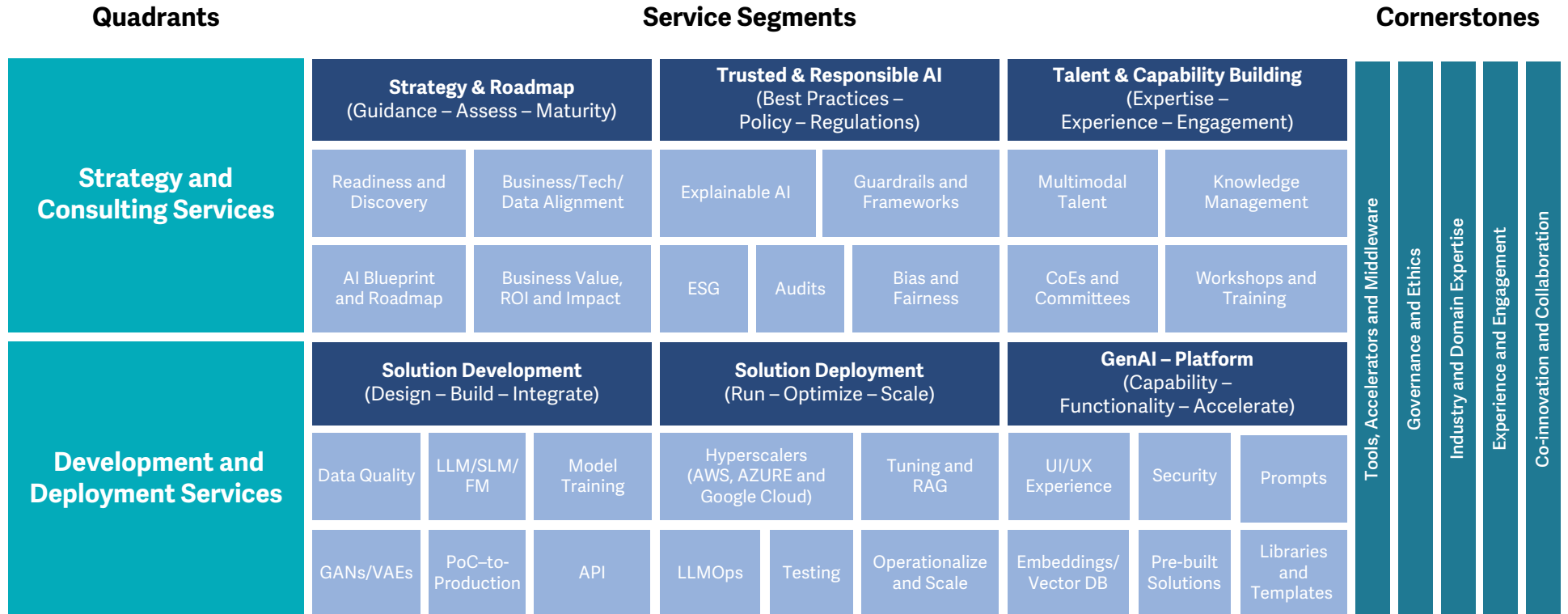
- As organizations move beyond pilots, advisory services play a critical role in defining GenAI roadmaps, establishing governance models and building scalable operating frameworks to accelerate ROI and enterprise-wide adoption.
- LLMs are advancing in reasoning, contextual awareness and multimodal capabilities, while smaller, domain-specific models gain traction for cost-efficient, high-precision applications. Fine-tuning and retrieval-augmented generation (RAG) enable secure, data-driven customization.

- As deployments scale, LLMOps frameworks manage model lifecycle, versioning and security, ensuring traceability. Continuous evaluation, prompt refinement and bias detection help sustain accuracy and business alignment.
- Autonomous AI agents are increasingly capable of executing multi-step tasks, orchestrating workflows across enterprise applications and augmenting decision-making.
- Enterprises are embedding transparency, explainability and risk management into GenAI strategies to safeguard trust and ensure sustainable adoption.

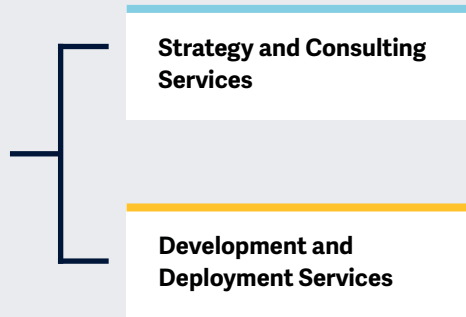
While GenAI's potential is transformative, success depends on scalable architecture, disciplined governance and continuous optimization to unlock long-term value.



Generative AI Services – 2026



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



Simplified Illustration Source: ISG 2026

Definition

The ISG Provider Lens® Generative AI Services study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the global market and different regional markets, including Brazil

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



Definition

In this quadrant, ISG evaluates providers delivering strategy and consulting services to help enterprises plan, govern and operationalize GenAI initiatives. These services equip business and IT leaders with decision frameworks and practical guidance to set priorities, align stakeholders and translate GenAI ambition into executable roadmaps.

Providers assess use case identification and prioritization, data readiness and risk and advise on model selection, fine-tuning strategies and scalable architecture design. They define governance frameworks, responsible AI policies and compliance structures to manage regulatory and ethical risks. Increasingly, consultants define LLMOps-enabled operating models, lifecycle management processes and continuous evaluation mechanisms to sustain performance at scale.

Providers integrate strategy, governance and organizational readiness with change enablement approaches to drive industrialized GenAI adoption and sustained value realization.

Eligibility Criteria

1. Demonstrate **domain-specific advisory experience** in designing and scaling enterprise-wide GenAI strategies
2. Provide client references showcasing **PoC-to-production progression, use case prioritization** and value creation, with a value-tracking approach
3. Exhibit advisory expertise in **LLMs, small language models (SLMs), fine-tuning, RAG architectures and model selection strategies**
4. Demonstrate advisory capabilities in defining **LLMOps frameworks**, including lifecycle management, monitoring, versioning and governance
5. Showcase advisory capabilities in framing **continuous evaluation mechanisms**, including performance monitoring, bias detection and model optimization frameworks
6. Present evidence of transitioning from **strategy to implementation** readiness, beyond PoCs
7. Demonstrate partnerships across **technology providers, cloud hyperscalers, academia and startup ecosystems**
8. Showcase investments in reusable advisory-related **proprietary assets such as accelerators, frameworks and platforms**
9. Establish and implement robust **responsible AI and governance frameworks**, addressing transparency, explainability, security and regulatory compliance
10. Support **operating model design, change management and AI capability building** to enable sustainable GenAI adoption



Definition

In this quadrant, ISG evaluates providers delivering development and deployment services to industrialize and scale GenAI solutions from pilot to production. Providers support the end-to-end lifecycle, including solution design, model customization, systems integration, deployment and ongoing optimization.

Providers architect secure, cost-efficient cloud and hybrid infrastructures to enable scalable model training and inference. They deliver fine-tuning foundation models, RAG architectures, multimodal integration and embedding GenAI into business workflows. Providers operationalize LLMOps practices, including automated pipelines, monitoring, version control, performance management and continuous evaluation to address drift and reliability at scale. Security controls, data governance and regulatory compliance mechanisms are increasingly core to delivery.

Providers deliver resilient, production-grade GenAI environments that accelerate value while ensuring stability, security and trust.

Eligibility Criteria

1. Demonstrate expertise in **designing and deploying enterprise-grade cloud and hybrid infrastructure** for scalable model training and inference
2. Optimize compute utilization through **cost-efficient orchestration, GPU management and performance tuning**
3. Showcase capabilities in **building and fine-tuning foundation models, implementing RAG architectures and developing and customizing SLMs using domain-specific data**
4. Maintain a skilled **GenAI engineering and data science team** with expertise in preprocessing, model optimization and evaluation
5. Operationalize **LLMOps pipelines**, including automated deployment, version control, monitoring and lifecycle management
6. Implement **continuous evaluation and performance monitoring** to address drift, hallucinations and reliability at scale
7. Demonstrate proficiency in **API integration, orchestration and embedding GenAI into enterprise applications and workflows**
8. Establish **security, data governance and regulatory compliance controls**, including encryption and access management
9. Showcase **production-grade use cases and scaled deployments beyond PoCs**, aligned to measurable ROI and business outcomes
10. Demonstrate capability in developing and deploying **multimodal, GenAI and agentic AI solutions** across enterprise environments



Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following two quadrants on Generative AI Services 2026:

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



The research phase falls in the period between April and May 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2026.

Milestones	Beginning	End
Survey Launch	April 2, 2026	
Survey Phase	April 3, 2026	May 22, 2026
Sneak Preview	August 2026	August 2026
Press Release & Publication	September 2026	

Please refer to the [ISG Provider Lens® 2026](#) research agenda to view and download the list of other studies conducted by ISG Provider Lens.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

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

In the course of the Generative AI Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens® 2026 – Generative AI Services research study analyzes the relevant service providers in the Brazil and global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



Contacts For This Study

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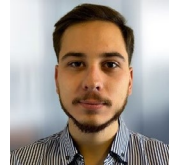
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Analyst**



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**Research
Analyst**



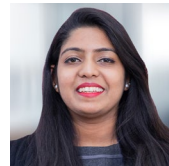
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**Data
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**Sibin
Varghese**

**Senior Program
Manager**



**Sukanya
Nair**

**Senior Project
Manager**



ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Loren
Absher

Director



Ryan
Hamze

Director



Olga
Kupriyanova

Director



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

66Degrees*

A3Data*

Aays*

Accelirate

Accenture*

Accion Labs*

adesso SE

Agilisium

AI/R*

Alexander Thamm*

All for One Group

Analytics8*

Ancoris*

Apex Systems

Apexon*

Aptus Data Labs

Ascendion*

Atos*

Aventra Group

b.telligent

Bell Integration

Birlasoft*

BJSS

BlueShift Brasil*

Brillio*

BRLink*

BRQ*

C5i

Capgemini*

CGI*

CI&T*

Coforge*

Cognizant*

Computacenter

Customertimes

Cyient

Dadoteca*

dataRain*

Deal*

Dedalus*

Deloitte*

doubleSlash

DXC Technology*

Egen.ai

Encora

Ensono

EPAM Systems*

EXL*

EY*

Factspan*

Falconi*

Firstsource*

Flexa*

Fractal Analytics

Fujitsu*

Genpact*

GFT*

GlobalLogic

Globant*

Grazitti Interactive



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* Rated in previous iteration

Guidehouse
Happiest Minds
HCLTech*
Hexaware*
Hitachi Digital Services
HPE
HTC Global Services*
IBM*
IGT Solutions*
Ília*
Impetus*
InData Labs*
Indium Software*
Infogain
Infosys*

InfoVision*
Innova Solutions*
Innover Digital*
ITC Infotech*
it-novum
Jade Global
Jump*
Keyrus
Konecta
KPMG
Kyndryl*
Latentview Analytics
Leeway Hertz
Lingaro Group*
Logicalis*

LOWCODEMINDS
LTM*
MadeinWeb*
Marlabs*
Mastek*
MATH Group*
Microland*
Movate*
Mphasis
MSRcosmos
Mu Sigma
Navikenz*
Neosoft
Network Science*
N-iX*

NTT DATA*
OPITZ CONSULTING
Orange Business*
Orion Innovation*
Peers*
Persistent Systems*
pmOne
Publicis Sapien
PwC
Pythian
Qualitest
Quality Digital*
Quantiphi*
Quinnox
Rackspace Technology*



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* Rated in previous iteration

Randstad Digital

Reply

Sagility*

Sauter Digital*

Sedin Technologies/Datakulture

Semantix

SG Analytics*

Shellkode

Sigmoid*

Skopia*

Softtek

Softweb solutions

Sopra Steria*

Spassu*

STATWORX

Stefanini*

Straive*

Sutherland*

TCS*

Tech Mahindra*

Tech Mango

ThirdEye Data

Tietoevry*

Tiger Analytics*

TIVIT*

TP*

Tredence*

Trianz*

Trigent*

Triggo.AI*

T-Systems*

Unisys*

Unit8

UnityOne AI

UST*

V8.Tech*

Valcann*

Version 1*

Virtusa*

Visionet*

Wavestone

Wipro*

WNS Analytics*

Xebia

Xertica.ai*

Xoriant*

Xplain Data GmbH

Yash Technologies

Zensar Technologies*

ZS



Provider Lens®

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

For more information about ISG Provider Lens® research, please visit this [webpage](#).

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

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

For more information, visit isg-one.com.





APRIL, 2026



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