HFS

HORIZONS REPORT

Agentic Services, 2026

An assessment of agentic services across service providers, addressing the why, what, how, and so what

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“Agentic AI isn’t a software upgrade. It changes who does the work and how work gets done. You need partners that understand you aren’t buying tools, but outcomes.”

Phil Fersht
CEO & Chief Analyst,
HFS Research

“Successful agentic services require superior domain expertise, tech depth, and the engineering credentials to make your AI plumbing work.”

David Cushman
Executive Research Leader,
HFS Research

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1 Introduction and research methodology

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Introduction

"**HFS Horizons: Agentic Services, 2026"** is our very first report about agentic services, acknowledges the point we have already reached: AI-led agentic services (see pages 6 and 17) augmenting human capabilities through smart AI agents to optimize processes and decision making.

- This research study evaluates how effectively service providers are helping enterprise clients embrace innovation and realize value across three distinct Horizons.
  - **Horizon 1 – Functional digital transformation:** Disruptors driving digital transformation by leveraging agentic AI to improve business outcomes such as cost reduction, speed, and efficiency across elements of an industry's value chain.
  - **Horizon 2 – Enterprise transformation:** Enterprise innovators (Horizon 1+) enabling the OneOffice model of end-to-end organizational alignment across the front, middle, and back offices by leveraging agentic AI to improve decision making and drive unmatched stakeholder experience across processes.
  - **Horizon 3 – Ecosystem Transformation:** Market leaders (Horizon 2 +) embracing the emerging paradigm of **Services-as-Software™** (SaS) by leveraging agentic AI to redefine how work gets done and drive new sources of value and co-creation with **OneEcosystem** partners.
- This research evaluates the capabilities of 36 service providers across the agentic services value chain based on a range of dimensions to understand the ***why, what, how, and so what*** of their service offerings.
- The study highlights the value-based positioning of each participant across the three distinct Horizons. It also includes detailed profiles of each service provider, outlining their facts, strengths, and development opportunities.
- For the first time, we have introduced **"SaS Stars"** spotlighting service providers that are fundamentally changing its business models toward Services-as-Software by beginning to operationalize agentic capabilities, reduce reliance on human intervention, and move toward scalable, technology-led service delivery.
- The report is global in scope and provides critical insights for enterprises embarking on their agentic services journey, covering the roles and capabilities of service providers and ecosystem partners supporting enterprise adoption.
- *HFS recognizes that the agentic services landscape is evolving at a rapid pace. This report aims to capture the momentum of agentic capabilities through vendor briefings, conversations with clients and partners, and extensive analysis. That said, the data collection for this report took place between September 2025 and January 2026.*

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Definition

Agentic services are *managed offerings* that embed **large language model (LLM)-enabled autonomous agents with tool-calling, memory, and orchestration** into end-to-end workflows. This enables the system to **perceive context, plan goal-driven actions, and execute them at scale with trust,** while humans set objectives, policy guardrails, and success criteria.

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Inclusion criteria – Service providers must offer case studies to meet these criteria

The **"HFS Horizons: Agentic Services, 2026"** report aims to help enterprise decision makers evaluate service providers' alignment with their objectives and needs. Providers must be clear about what makes them different, how they get work done (and the extent to which this shifts them toward Services-as-Software), and the impact of their work on live customers.

Participants must deliver the following:

Pilots and proofs of concept (POCs) into production

To engage in this study, providers must present at least three large-scale case studies on agentic services, with at least two being customer-facing and all in production. POCs and pilots are acceptable only with a referenceable client. Client-zero case studies are acceptable only when external case studies are insufficient.

Focus on outcomes

Providers should support enterprise clients in shaping a rigorous business case, estimating/managing costs, and measuring ROI. They must share at least three enterprise case studies showing ≥15% productivity or ≥5% net-new revenue and/or where agents are replacing FTE services.

Speaking to customers

Service providers must be ready to facilitate conversations with their customers.

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Executive summary (1/2)

1	**SaS Stars and Horizon 3 service providers revealed**	We assessed 36 service providers across their value propositions (the why), execution and innovation capabilities (the what), go-to-market strategy (the how), and market impact criteria (the so what). From this analysis, we spotlighted five service providers as SaS Stars: Accenture, Cognizant, IBM, Infosys, and Wipro. These companies demonstrated the strongest progress toward Services-as-Software to date. They are beginning to operationalize agentic capabilities, reduce reliance on human intervention, and move toward scalable, technology-led service delivery. The Horizon 3 service provider leaders are Ascendion, Capgemini, EY, HCLTech, KPMG, NTT DATA, Publicis Sapient, and TCS. These companies have demonstrated an ability to support enterprises across the agentic AI journey, starting from functional digital transformation through enterprise-wide modernization to creating new value through ecosystems and new ways of working. Shared characteristics include strong aspirations to transform business models and reimagine workflows and enabling the shift to autonomous/agent + human processes rather than simply digitizing current ways of working. This is not just for enterprise clients; internal business functions and delivery capabilities are increasingly showcasing such capabilities, indicating possible shift to Services-to-Software. They are developing expertise across the agentic services value chain (consulting, IT, and operations) by adopting a full-services approach. They are also focusing more on internal and external innovations, co-innovating with clients and partners, and adopting non-traditional commercial models while ensuring proven client impact and outcomes.
2	**What enterprises need from service providers**	The HFS Horizons model closely reflects enterprise maturity. In our "voice of the customer" interviews, AI leaders reported that the greatest value delivered by service providers sits in Horizon 1, where the focus is on productivity, efficiency, faster decision making, and cost optimization through functional AI and agent-led optimization. At the same time, enterprises are increasingly relying on providers to modernize legacy systems and align front, middle, and back offices while selectively pursuing innovation and new value through AI ecosystems. Enterprise leaders must align provider selection to the specific business value and Horizon they want to achieve.

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Executive summary (2/2)

3	**How service providers are meeting enterprise needs**	Service providers are meeting enterprise agentic AI needs by prioritizing scale readiness over raw autonomy. They focus on agent platforms, orchestration layers, and governance frameworks to move pilots into production while managing risk, trust, and compliance. Investments focus on domain-specific agentic solutions, enterprise transformation advisory, and managed agentic services, especially around software development life cycle (SDLC), IT operations, and core workflows. However, while platformization and AI-led automation are advancing faster, true Services-as-Software remains limited, with autonomy typically capped by human oversight, outcome accountability constraints, and enterprise operating model readiness.
4	**Voice of the customer**	We conducted in-depth interviews with 42 enterprise leaders as part of this study's "voice of the customer" research. AI leaders consistently rely on service providers to drive productivity gains and cost efficiencies, citing strengths in delivery quality, AI expertise, co-innovation capabilities, and access to best-of-breed partner technologies. Overall satisfaction with providers remains high, averaging 8.5 out of 10 for CSAT on foundational needs. However, enterprises are increasingly seeking more innovative commercial models and stronger provider-led IP creation and R&D to support enterprise-wide adoption of agentic AI.
5	**Voice of the partners**	Service providers engage a broad ecosystem of partners to address evolving enterprise requirements. Partner satisfaction with these firms is generally strong, signaling positive downstream impact for clients. However, partners find that providers often overstate the delivered value and should thus strengthen their talent management and execution rigor. Enterprises, in turn, must deliberately assess and capture the value created through ecosystem-led collaboration rather than individual vendors alone.
6	**Voice of the employees**	Service providers are actively investing in and curating agentic AI training programs for their workforce. While 92% of the employees interviewed reported receiving formal training from their employers, nearly 90% found it insufficient. Technical complexity, limited time to apply learning, weak incentives, and gaps in internal infrastructure are slowing both individual and organizational adoption. This disconnect underscores the need for more holistic and interdisciplinary training, stronger incentives, practical application opportunities, and better-aligned platforms and solutions to accelerate adoption at scale.

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HFS' agentic services value chain

Why you?

- Your unique value proposition, not your what or your how
- The three key problems you address

What you do

Solutioning

- How do you plan and design: Opportunity and risk identification and mitigation
- Three core offerings
- Extent to which these are productized or platformized
- Extent of autonomous frameworks and AI-led automation in these core offerings
- How they are priced

Build and connect

Within the three core offerings:

- Application of tech partnerships
- Approach to collecting and connecting data
- Approach to integration

Measure, improve, innovate

- Security, privacy, governance management
- Success metrics
- Training and future proofing
- Continuous improvement loops
- How pricing models evolve

How you do it

So **What?**

Evidence of customer impact

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The 36 service providers evaluated in this report

Note: All service providers are listed alphabetically.

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Sources of data

This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of the participating organizations our study covers. Sources are as follows:

Briefings and information gathering

HFS conducted detailed **briefings** with AI leadership from each vendor.

Each participant submitted a specific set of **supporting information** aligned to the assessment methodology.

Reference checks

We conducted reference checks with **42 active clients, 58 active partners, and 93 active employees** of the study participants via survey-based and telephonic interviews.

Other data sources

Public information such as press releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

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Horizons assessment methodology for agentic services (1/2)

The **"HFS Horizons: Agentic Services, 2026"** research evaluates the capabilities of providers to understand the ***why, what, how, and so what*** of their agentic services offerings. Our assessment is based on inputs from clients, partners, and employees, augmented by analyst perspectives. The following illustrates how we assess their capabilities.

Distinguishing Supplier characteristics

Assessment dimension	Assessment sub-dimensions (briefing questions)	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The Why? (20%)	• What is your unique value proposition? Why should a company choose you over others for their agentic services requirements? • What are the three key problems your agentic services will address?	• Driving digital transformation by leveraging agentic AI to improve business outcomes such as cost reduction, speed, and efficiency, primarily for tasks within the front, middle, and back offices. • Helping enterprises understand the data, processes, and interactions needed to drive functional optimization	• Horizon 1+ • Ability to enable the OneOffice model of end-to-end organizational alignment across the front, middle, and back offices by leveraging agentic AI to improve decision making and drive stakeholder experience • Help enterprises break down the data silos continuously, find patterns, and maintain robust governance across all decision points	• Horizon 2+ • Ability to enable, articulate, and aspire to shift toward Services-as-Software by leveraging agentic AI, with early evidence, a strong narrative, and clear roadmaps to redefine how work gets done, driving new sources of value and co-creation with OneEcosystem partners • Drive OneEcosystem impact via collaboration across multiple organizations with common objectives around enabling completely new sources of value
Execution and Innovation capabilities: The What? (20%)	• How do you plan and design (opportunity and risk identification and mitigation)? • What is your approach to collecting and connecting data? • What are your three core offerings? • How do you ensure seamless integration with clients' existing systems? • Illustrate the extent to which these offerings are productized or platformized. • Provide evidence of the extent of using autonomous frameworks and AI-led automation in these core offerings. • Describe your security, privacy, and governance management in the context of your core offerings. • What do you have in place to control and respond to errors? • How do you ensure continuous improvement loops in your core offerings?	• Proven repeated agentic AI use case generation • Proven capabilities in moving agentic AI into production • Third-party agentic AI tools and technologies • Processes and frameworks for security, governance, and privacy • Continuous improvement loops • Proven capabilities for managing data for agentic AI • Typically offshore-focused with strong technical skills	• Horizon 1+ • Processes and frameworks in place to generate net-new value cases with agentic AI • Processes in place for taking agentic AI use cases to production • Offshore and nearshore capabilities with both technical and consulting skills • Implementation of third-party and own IP • Market-ready AI-driven proprietary tools, assets, and frameworks • Proven processes and IP for data management for agentic AI • Structured employee training on agentic AI • Focus on human-agent management and change management	• Horizon 2+ • Processes and frameworks for prioritizing and delivering agentic AI value cases consumed by enterprises as a service • Deep partnerships, including joint IP creation with AI technology leaders • Ability to implement with third-party, joint, and own IP • Proven capabilities for human-agent management and change management • Well-rounded capabilities across all value creation levers: talent, domain, technology, data, and change management

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Horizons assessment methodology for agentic services (2/2)

The **"HFS Horizons: Agentic Services, 2026"** research evaluates the capabilities of providers to understand the ***why, what, how, and so what*** of their agentic services offerings. Our assessment is based on inputs from clients, partners, and employees, augmented by analyst perspectives. The following illustrates how we assess their capabilities.

Distinguishing Supplier characteristics

Assessment dimension	Assessment sub-dimensions (briefing questions)	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Go-to-market strategy: The How? (20%)	• How do you price your three core offerings today? How do you enable your pricing models to evolve? • How do you apply your ecosystem of partners to the three core offerings? • What are the success metrics for your three core offerings? • How are you future-proofing through training, access, and approach to technology?	• Primarily effort-based relationships • Some alliances with AI technology leaders	• Horizon 1+ • Increasing number of performance-based relationships in the portfolio • Alliances with many AI technology leaders	• Horizon 2+ • Driving co-creation with ecosystem partners and AI technology leaders • Evidence of purpose-based (co-creation) partnerships with clients in addition to the increasing number of performance-based relationships in the portfolio
Market impact: The So What? (40%)	• Share at least three case studies that have gone into scale production. Include business case prioritization and how/if costs have aligned with initial predictions. Include ROI, KPIs, tech stack, and client quote. Provide at least three example case studies showing ≥15 % productivity or ≥5 % net-new revenue or where agents are replacing services and customer ROI. These should ideally be in production, but POCs will also be considered ONLY with referenceable clients. Client-zero case studies may be acceptable in the absence of sufficient external case studies. • Across all deployed agentic AI solutions, how many use cases have been scaled to enterprise production? How many autonomous agents are currently running in live environments? • Voice of the customer	• Recognized as strong implementation vendors • Referenceable and satisfied clients for ability to execute	• Horizon 1+ • Recognized as strategic partners by clients • Referenceable and satisfied clients for the ability to execute and innovate	• Horizon 2+ • Recognized as thought leaders by clients • Referenceable and satisfied clients driving new business models through partnerships

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Introduction and assessment methodology

SaS Stars: Agentic Services, 2026

The **SaS Stars** spotlight service providers that are progressing toward software-driven service delivery as agentic services mature. Services-as-Software reflects a shift away from labor-centric models toward operating models in which intelligence and autonomy are embedded directly into how services are designed, delivered, and scaled. HFS developed this assessment to provide greater visibility into how Services-as-Software is unfolding in the market.

All providers in Horizon 3 are recognized as leaders moving the market toward Services-as-Software. The SaS Stars designation simply highlights **five service providers** whose recent proof points most strongly align with this direction and are making distinctive, demonstrable changes to move from the legacy services model.

This assessment measured progress against HFS' Services-as-Software capability framework, assessing provider maturity across the core elements required for the journey toward Services-as-Software. Our SaS Stars assessment is based on the evidence and proof points shared during the research process, client and partner interviews and experiences from our advisor team working on live contract engagements that comprise SaS elements.

Note:
- The Services-as-Software criteria assessment is directional and validated by HFS analysts
- This is a leadership callout, not a ranking.
- This list reflects firms covered in depth in the "HFS Horizons: Agentic Services, 2026" report, not the full universe of potential SaS players.

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2 Market dynamics

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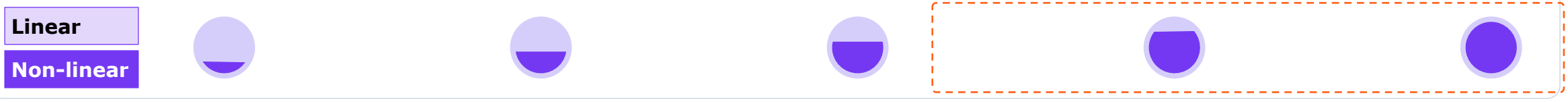
Services-as-Software™ (SaS) promises a non-linear economic model

HFS Services and Ops Tech Vision 2028

Staff augmentation	Technology-enabled services	Platform-led services	AI-led Agentic services	Services-as-Software™
Enables companies to quickly fill skill gaps, scale teams up or down as needed, and maintain control over project execution	Primarily driven by people but supported by proprietary solution accelerators, tools, and software	Leverage built-in delivery platforms to enhance service delivery and efficiency	Augment human capabilities through smart AI agents to optimize processes and decision-making	Unlike traditional software-as-a-service (SaaS), this model focuses on delivering services primarily through technology, minimizing human intervention, and maximizing efficiency

Humans + Machine mix (capability model)
Shows how delivery shifts from human-led execution to machine-led (AI) orchestration, with humans focused on judgment and oversight

Linear vs. Non-linear (economic model)
Indicates whether revenue and margins scale with headcount or are decoupled through platforms, IP, and AI



Current state
2000-2025

Emerging
2025+

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Evolution of AI: Agentic AI is picking up where generative AI (GenAI) and robotic process automation (RPA) left off

RPA

"I follow instructions exactly"

RPA is the **task automation** that replaces manual effort in routine, rule-based processes.

Key characteristics:

- Executes structured, rule-based processes
- Performs repetitive digital tasks with precision
- Operates within defined system boundaries
- Follows exact step-by-step procedures

GenAI

"I can create based on prompts"

GenAI is a **productivity amplifier** that supports and enhances human work, transforming workflows without fully replacing human decision making.

Key characteristics:

- Assists with specific tasks (writing, analysis, coding)
- Requires human direction and oversight
- Improves individual productivity
- Works within existing job roles

Agentic AI

"I can understand goals and figure out how to achieve them"

Agentic AI is a **collaborative actor** that autonomously executes and coordinates complex tasks.

Key characteristics:

- Acts as virtual coworker completing end-to-end processes
- Self-directs and coordinates multiple tasks
- Transforms entire workflows
- Creates new organizational paradigms

The progression from RPA → GenAI → Agentic AI highlights a shift from simple task execution to advanced decision making and workflow transformation. This evolution signals a move toward more autonomous and strategic AI capabilities for enterprises.

Source: HFS Research, 2026

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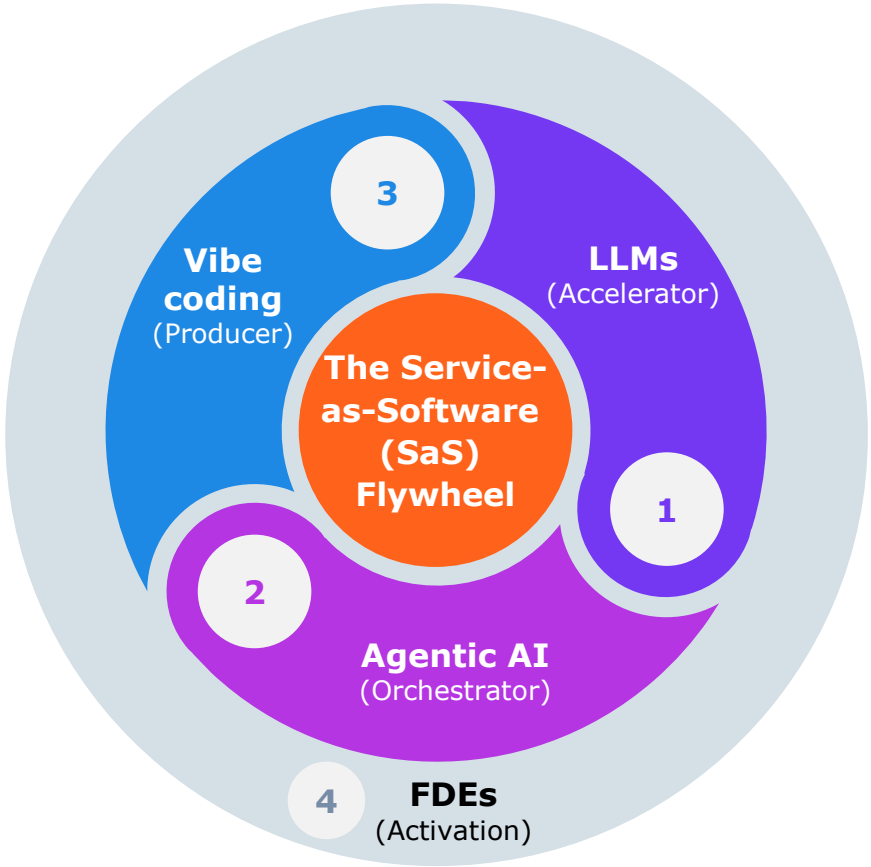
Services-as-Software delivery is accelerated by LLMs, orchestrated by agentic AI, produced by vibe coding, and activated by FDEs

A new operating logic for AI-native delivery



How it works:

1. **LLMs** accelerate reasoning, code generation, and knowledge access
2. **Agentic AI** orchestrates workflows, decisions, and compliance
3. **Vibe coding** produces working service agents directly from business intent
4. **FDEs** (forward-deployed engineering) activate AI systems into enterprise workflows, governance, and production environments

Source: HFS Research, 2026

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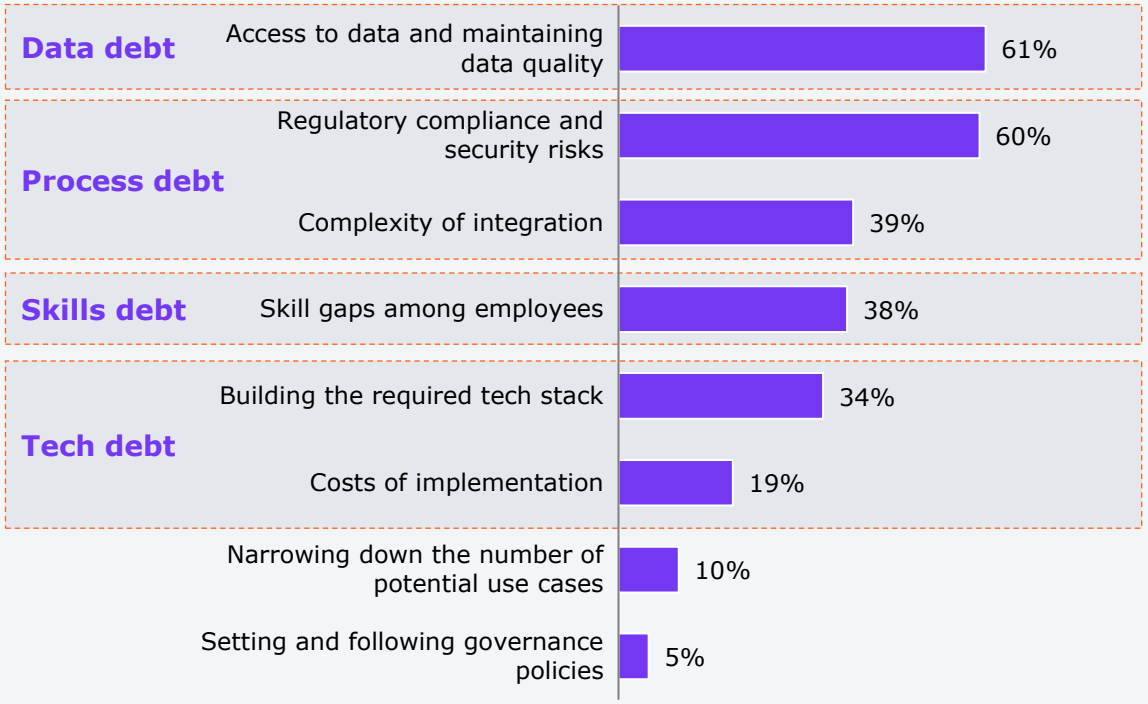
Agentic services expose the cost of unresolved enterprise debt

Which are the most significant challenges in implementing GenAI in your organization?



Sample size: 550 survey participants, Global 2000
Source: HFS Research, 2026

Partner for change to cut the chains of legacy

Ambitious enterprises are pushing to adopt AI-driven business models. However, change is a team activity, requiring partnerships with willing technology and service providers. As AI initiatives move beyond experimentation, such firms must help clients cut through technology noise and align on when, where, and how to move.

The shift from labor to technology demands experienced and visionary partners that can guide organizations through fast-moving technology ecosystems, redesign operating models, and build realistic transformation roadmaps. However, long-standing debts across data, process, skills, and technology continue to limit how far and how fast enterprises can go. Ambition alone is not enough.

To enable agentic services to operate reliably and at scale, enterprises and their partners must actively address foundational debt rather than layering new capabilities on top of existing constraints.

- **Fix your data debt:** Ensure you have the data you need to give agentic AI an accurate understanding of how your business works. Poor data means agentic guesswork and fast tracks to cascading errors.
- **Fix your process debt:** If you apply AI to simply repeat how you have always worked, don't expect to create new value. Now is the time to reconsider how things work with the new context of agentic AI capabilities.
- **Fix your skills debt:** Develop new skill sets that support the transition to embracing emerging technologies and AI-driven business models.
- **Fix your technology debt:** IT spending keeps swelling with each new platform and coding change. Stop buying technology for the sake of it; this has been the failure of so many previous investments. For instance, two-thirds of enterprises that were struggling with their cloud migration journeys had signed during the pandemic.

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Top seven takeaways from HFS Horizons: Agentic Services, 2026 (1/2)

Agentic AI scales when enterprise-grade tools, data foundations, and governance controls are combined with redesigned processes, clear decision rights, and embedded business context.

1

Platformization is accelerating, with Services-as-Software emerging

Nearly all providers now lead with agent platforms, with many offering orchestration too. Most still rely heavily on human oversight and services wrappers. Platforms act as accelerators, control planes, and copilots rather than owning end-to-end runtime accountability. Only narrow domains, such as testing, IT service management (ITSM), and customer support, achieve ~70% autonomy. The industry is still early in the transition from tool-enabled to software-owned services. Leaders have aspirations and are building the technology, but enterprises remain responsible for defining where agents can own outcomes.

2

Solving governance, risk, and security unlocks higher agent autonomy

Technical capability is advancing faster than enterprise tolerance for autonomous decision making. There is a strong focus on guardrails, policy engines, human-in-the-loop controls, audit logs, and kill switches. However, there is a limited use of agents with unsupervised decision rights, especially in finance, HR, and regulated operations. Agentic maturity is being constrained more by trust, governance, and liability models than by LLMs or tooling limitations. For enterprises, this is less of a technology limitation and more about risk appetite and operating design, particularly in regulated functions.

3

True disruption through agentic services remains relatively rare

Providers position agentic services as transformational, but current deployments optimize execution rather than redesign business models. Common use cases include productivity uplift, exception handling, workflow coordination, and knowledge retrieval. Horizon 3 use cases remain under 10% of portfolios. Agentic services today improve how work is done, while disruption remains concentrated in future roadmaps.

4

Repeatable proof is emerging, though uneven across use cases

There is a growing gap between the breadth of agentic narratives and the depth of evidence. Most providers rely on a small number of repeatable use cases reused across clients and industries. Claims of near autonomy are rarely supported beyond SDLC, ITSM, and contact center domains. This concentration of proof provides a clear starting point for providers to industrialize agentic services first. Enterprises should evaluate agentic maturity by use case based on measurable outcomes, observability, and operational control.

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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Top seven takeaways from HFS Horizons: Agentic Services, 2026 (2/2)

Agentic AI scales when enterprise-grade tools, data foundations, and governance controls are combined with redesigned processes, clear decision rights, and embedded business context.

5

SDLC is the most mature and repeatable agentic use case today

Across providers, SDLC stands out as the clearest proof point where agents deliver sustained value, not just pilots. Agents for code generation, testing, defect triage, release, documentation, CI/CD orchestration, and environment management are already operating at 40%–70% autonomy in production programs. This is the most substantial evidence that agentic services scale when workflows are deterministic, measurable, and telemetry-rich, making SDLC the blueprint for other domains.

6

IT and BPO services augment technology firms to accelerate execution-ready agentic AI capabilities

Technology firms are materially ahead of service providers in agentic execution maturity. They already own much of the control plane, runtime, governance hooks, and system-of-record integrations, allowing agents to execute work, not just orchestrate it. Their platforms increasingly embed agents directly into workflows, pricing, and products, which makes Services-as-Software more tangible today. However, their value still depends on enterprises and service partners resolving gaps in operating model, accountability, and change management. Enterprises must select both fit-for-purpose platforms and operationalize them through governance, process redesign, and ownership.

7

Redesigning operating models and accountability is the next frontier for agentic services

Agentic technology and orchestration platforms are now robust, but adoption is constrained by unresolved ownership of decisions, failures, compliance, and outcomes once humans exit the loop. Governance is often presented as a technical control layer, but it is fundamentally a business operating model issue. Agentic autonomy also requires embedding business context, including tacit knowledge, into workflows.

Enterprises accept AI assisting work but remain uncomfortable with AI owning work or being accountable for outcomes. As a result, autonomy typically plateaus well below full ownership, with humans retaining decision and accountability control in most enterprise deployments. Services-as-Software examples remain limited outside SDLC and limited IT operations.

All this explains why platforms resemble accelerators rather than products, orchestration stops short of execution, Horizon 3 deployments remain limited in scale and scope, pricing stays hybrid, and risk language dominates autonomy language.

Until decision rights, liability, and audit ownership are redesigned, agentic services will scale broadly but not deeply, remaining services-led. Winners will be those that help clients redesign accountability models, not just build better agents.

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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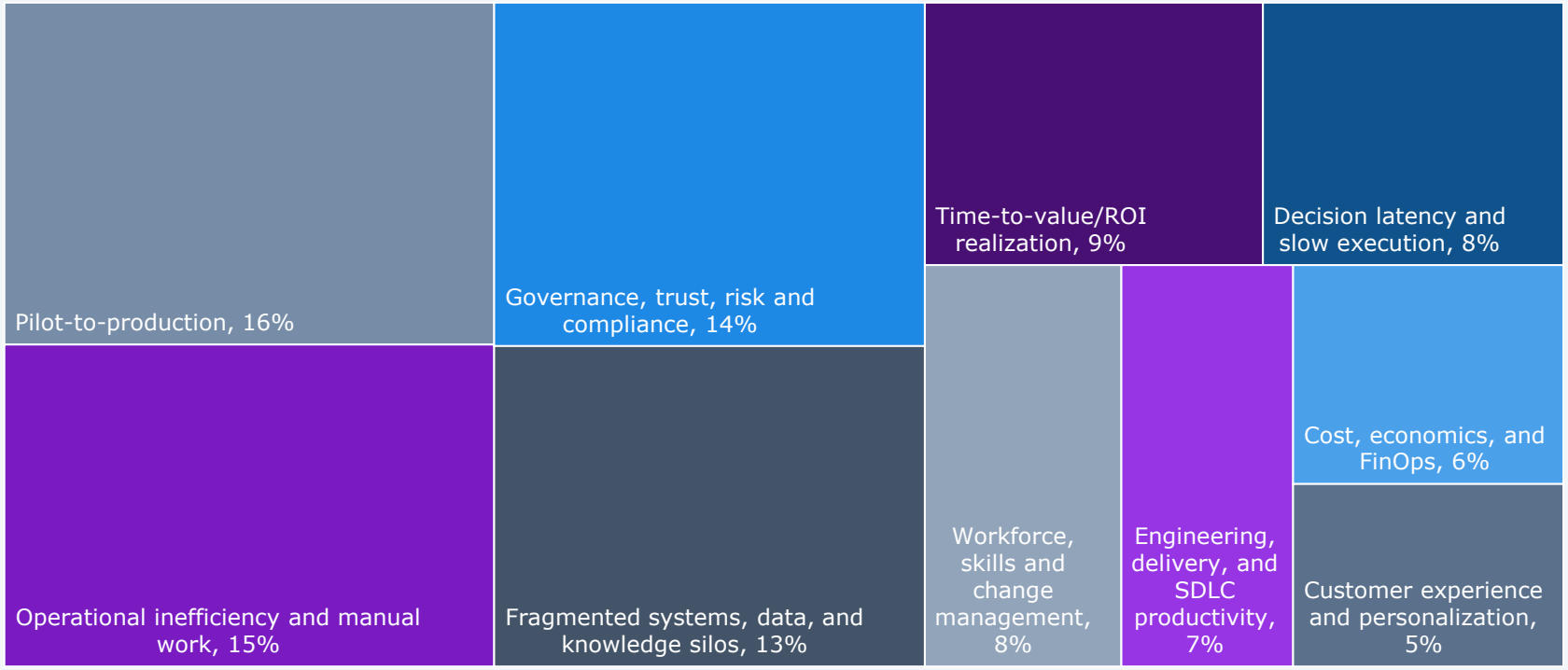
The key barriers that service providers want to overcome are scaling, operational inefficiency, governance, and system, data, and knowledge silos

What are the top three agentic AI problems that providers want to address?
(Percentage of responses)



We asked 36 leading IT and business services providers to identify the top three barriers they are currently addressing in the agentic services space. The most prominently cited challenges are pilot-to-production scaling gap, operational inefficiencies driven by manual work, governance, trust, risk and compliance, and organization, data, and knowledge silos. These barriers are less about AI capability itself and more about enterprises' ability to scale, control, and operationalize autonomy. Secondary themes such as time-to-value and ROI realization; decision latency, delayed insights; and skills upgradation and change management reinforce the need for end-to-end transformation rather than isolated AI deployments.

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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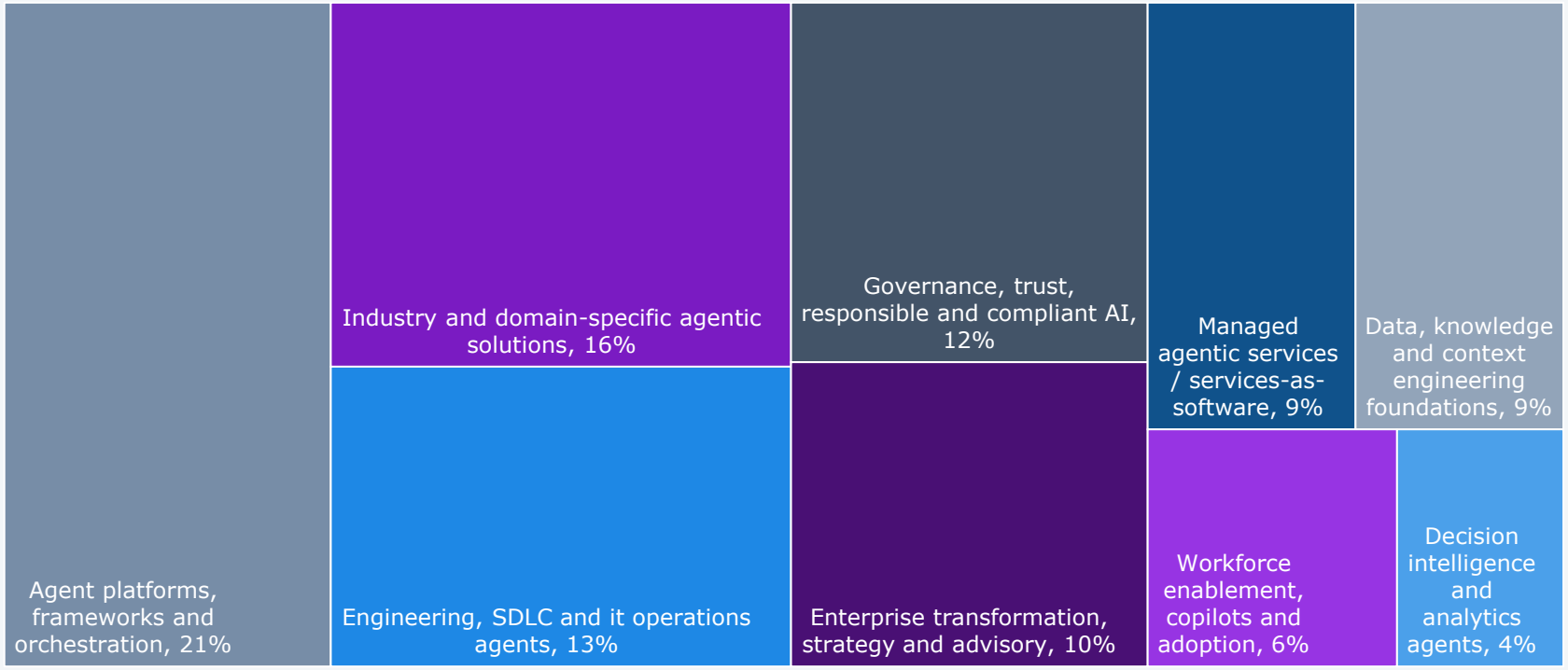
Providers are responding to the adoption barriers by investing in agent platforms, domain-specific agentic solutions, strategic advisory, governance, and other enabling capabilities

What are the three core agentic AI offerings of providers?
(Percentage of responses)



Service providers are responding to agentic AI adoption challenges by prioritizing agent platforms and orchestration layers, industry-specific agentic solutions, enterprise transformation, governance, trust, and compliance frameworks, engineering and operation agents, and advisory services. Substantial investments in managed agentic services complement these offerings, including data, knowledge, and context foundations. Together, this solution mix enables enterprises to move beyond experimentation to production-grade, governed deployments, scale autonomy responsibly, embed agents into core workflows, and realize sustained business value.

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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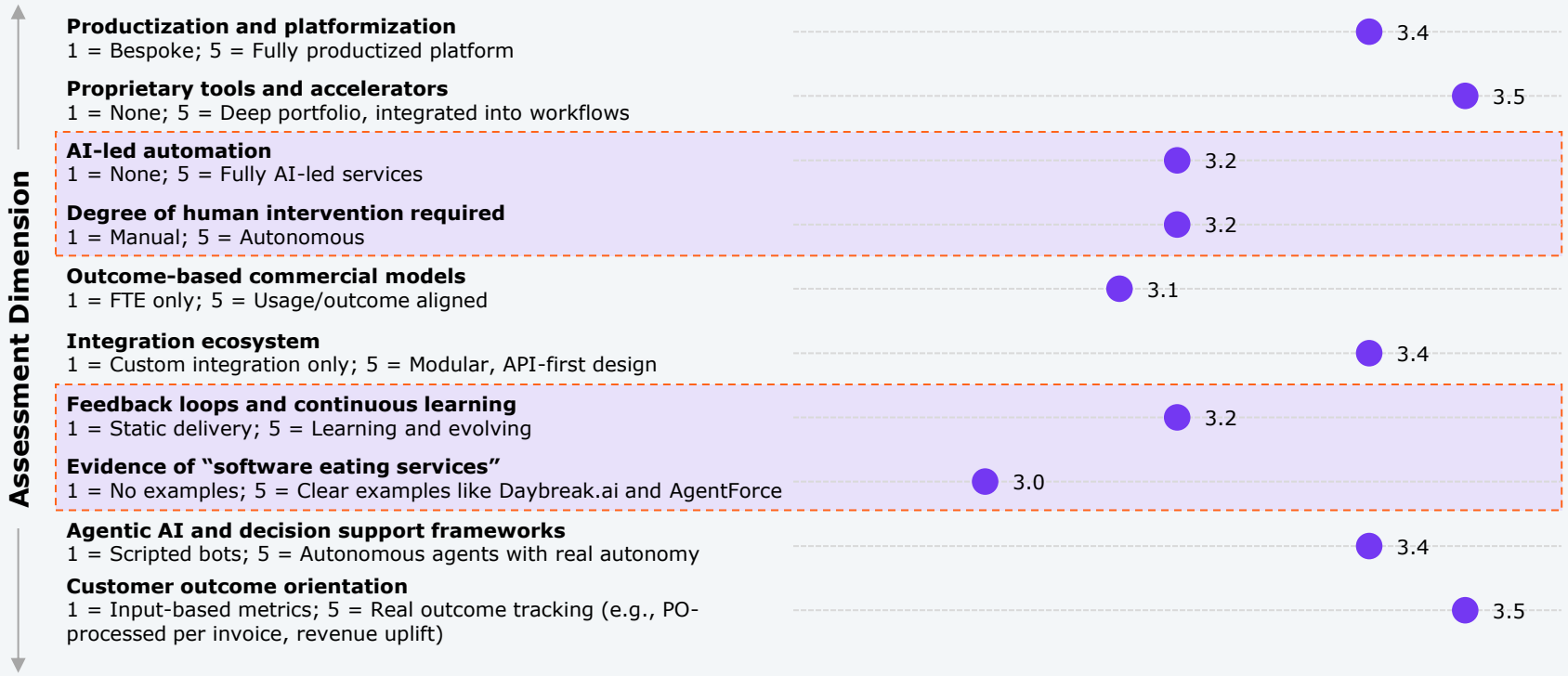
Progress with agentic platforms is leading the way – while evidence of SaS realization lags

Analyst view of journey toward Services-as-Software
(average rating of 1–5 of provider capabilities)



An overview of how agentic services providers are progressing toward Services-as-Software

Providers were scored on a scale of 1 to 5 on each dimension required for Services-as-Software. The scores shown are averages across the 36 firms in this study.

Providers are investing heavily in tools, platforms, and agent frameworks, but are weaker on autonomous workflows, outcome-based pricing, and clear evidence that software is replacing human efforts.

This indicates that providers are building the foundation for Services-as-Software faster than they can deliver it through services.

Overall, the market is moving in the right direction, but achieving Services-as-Software will require providers to effectively translate their assets into outcome-based service delivery.

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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Early signs of Services-as-Software are visible in ITSM and SDLC, where agentic AI is already achieving 70% autonomy

Case studies by agentic AI maturity and high future potential

Case study	Current maturity proof	Features indicating maturity potential
Autonomous ITSM/AIOps	• Multi-agent monitoring, diagnosis, remediation, and validation • Strong feedback loops from telemetry • Clear authority to act (restart, rollback, reroute, patch) • Mature ITSM processes: incident management and event and alert management	• Machine-readable infrastructure • Strong economic pressure due to downtime costs • Increasing trust in autonomous remediation
Closed-loop SDLC and DevOps agents	• Agents write, test, deploy, observe, and fix • Human oversight is supervisory, not operational • API-native tool ecosystems	• Software creation is already AI-mediated • Dev teams accept autonomy faster than business users • Rapid learning cycles
Contact center service orchestration	• Large volumes of unstructured input (voice, chat, email) • Repetitive intents with clear service outcomes • Lags in decision authority, emotional and contextual reasoning, cross-journey orchestration, closed-loop outcome learning, and governance and accountability models	• Policy-bound actions (refunds, credits) • Cross-channel coordination agents • Held back by human trust barrier, emotion, and brand risk
End-to-end claims orchestration (insurance and healthcare)	• Multi-agent workflows (intake, validation, fraud, settlement) • Growing autonomy in low-risk cases • Strong intelligent document processing (IDP) + reasoning layers	• Tiered autonomy models (held back by regulatory and reputational risk, and human override still common) • Proven ROI • Gradual expansion of decision authority
Real-time fraud, risk and compliance systems	• Continuous sensing and decisioning • Agents negotiate thresholds and actions • Strong data foundations	• Reinforcement learning and simulation • Regulator comfort with AI supervision (being held back by false positives, governance and explainability)
Agentic IDP and case management (such as KYC/AML investigation)	• Dominate early adoption • Document-heavy, decision-light today • Lags in continuous sensing, autonomous reprioritization, dynamic goal setting, and cross-case optimization	• Moving from document handling to decision delegation • Escalation logic becoming autonomous

Sample size: 36 service providers evaluated in this report
Source: HFS Research, 2026

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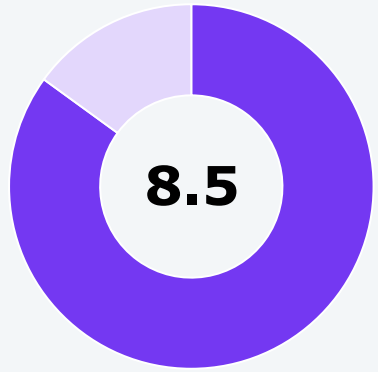
Productivity and efficiency gains are the top expected outcomes, with customers highly satisfied with service providers

What are the top three intended outcomes of your agentic AI solution?
(Percentage of respondents)

The top three intended outcomes when embedding agentic AI in workflows are reduced manual effort (74%), faster insights (33%), and cost savings (33%).

Customer view of how well providers delivered outcomes
(customer satisfaction ratings of providers; average out of 10)



Average satisfaction

Sample size: 42 customer references
Source: HFS Research, 2026

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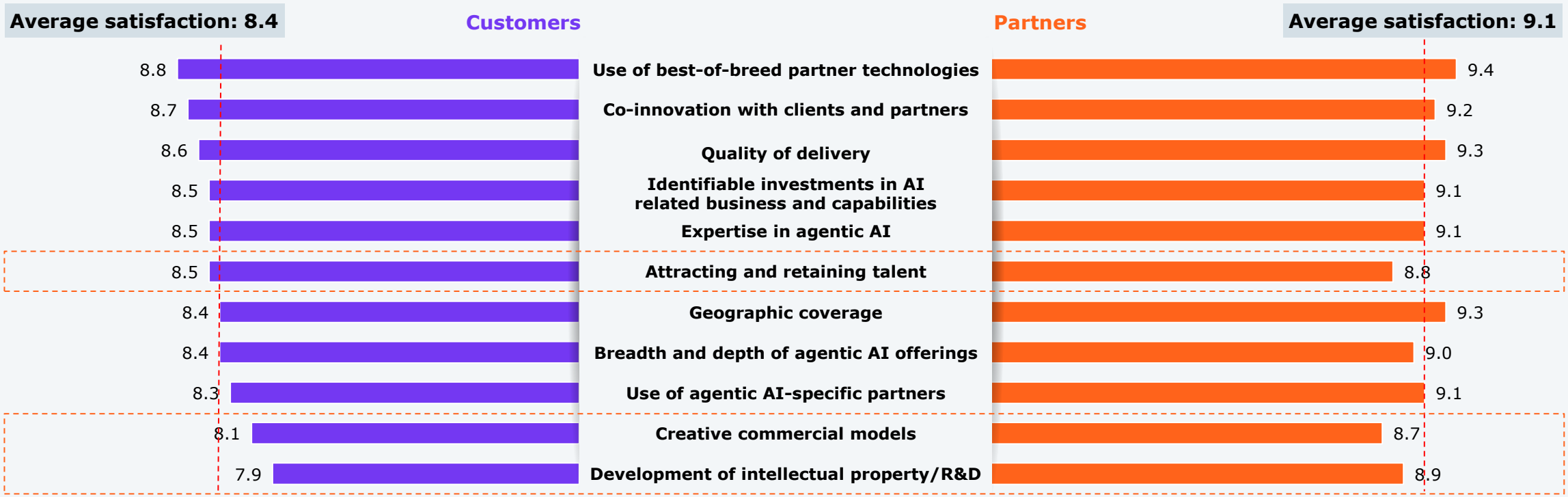
Developments in non-traditional commercial models, IP/R&D, and talent are necessary to enhance client and partner satisfaction

Please indicate how well your service provider has delivered the following outcomes.
(Scale of 1–10, where 1 is below expectations and 10 exceeds expectations)



Sample size: 42 customer references, 58 partner references
Source: HFS Research, 2026

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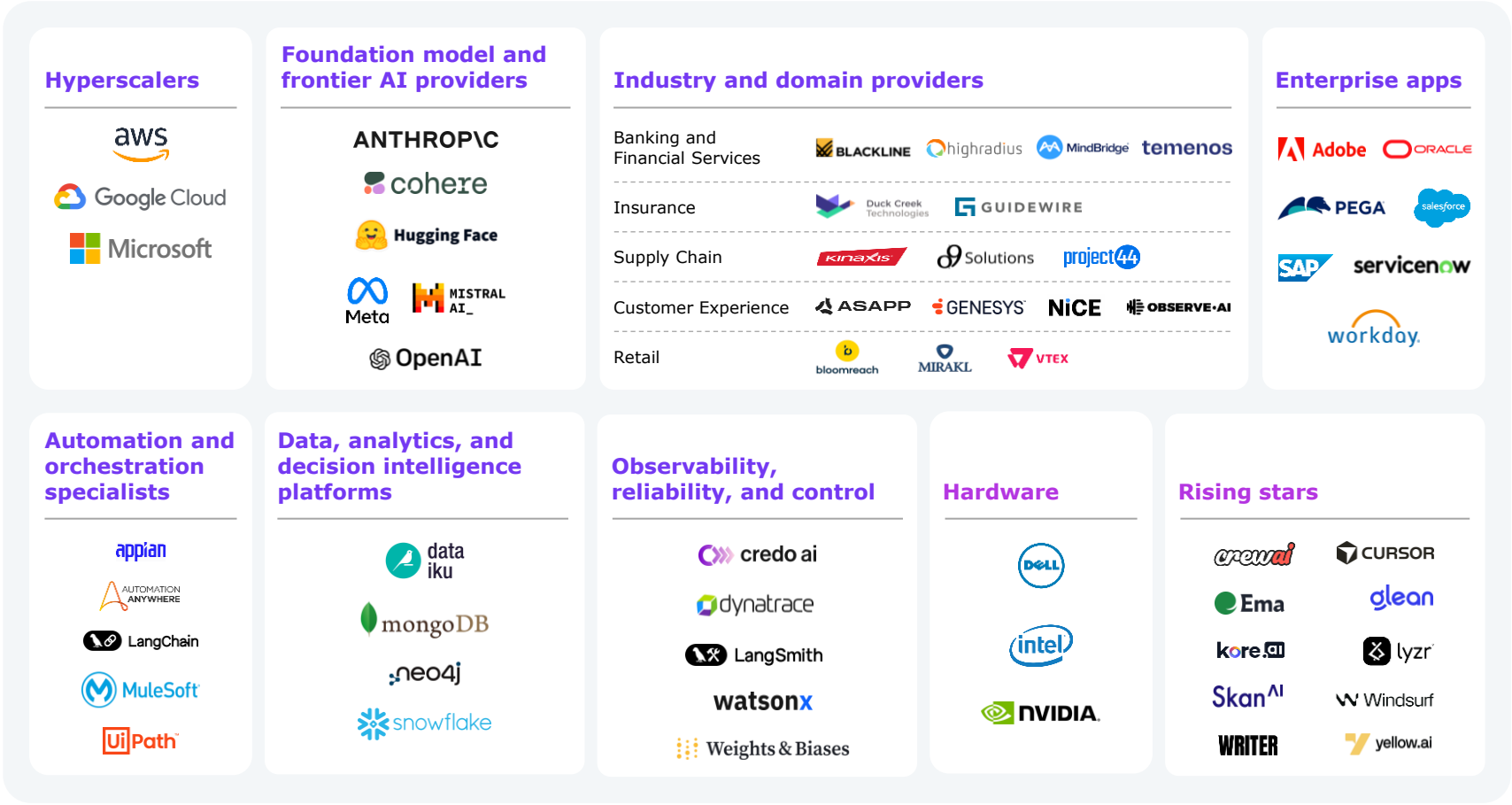
The agentic services ecosystem



An overview of the agentic services ecosystem based on partners most frequently referenced in the material provided by the 36 service providers included in this study.

These companies show where they are actively building, integrating, and partnering today.

The ecosystem spans hyperscalers and frontier model providers supplying core compute models, industry platforms, and enterprise applications that embed agentic capabilities into workflows, along with a growing set of orchestration, data, observability, and infrastructure specialists that enable scale, reliability, and control.

The Rising Stars highlight newer, agent-first products that are beginning to influence how autonomous outcomes are delivered.

This reflects the current agentic services ecosystem, but we expect this to evolve rapidly as the market matures.

Note: This is a representative list, not exhaustive; companies are listed in alphabetical order
Source: HFS Research, 2026

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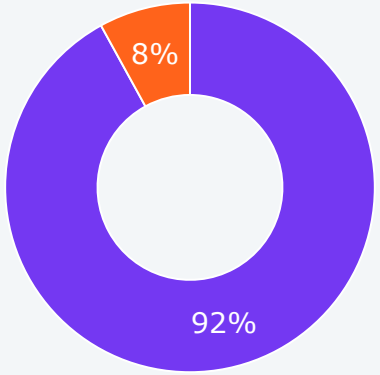
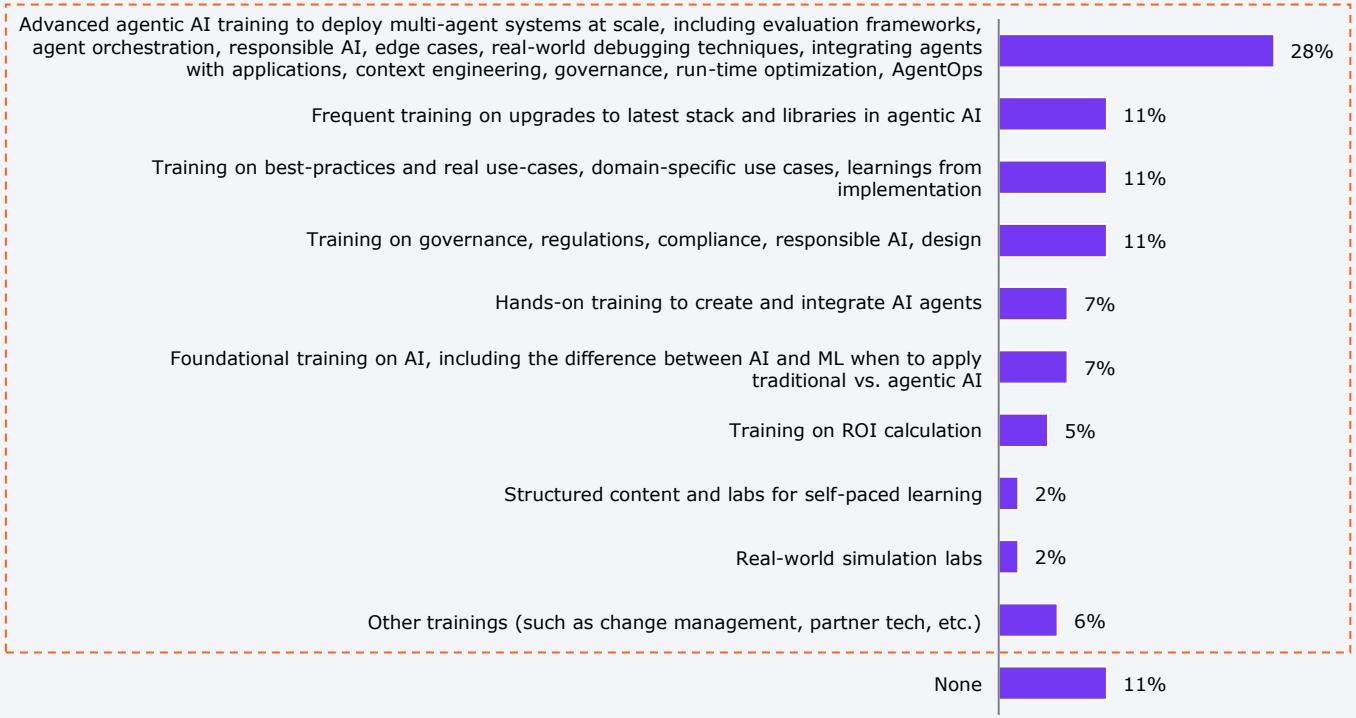
Around 92% of employees from service providers claimed they received formal agentic AI training; ~90% believe it is not sufficient and would benefit from additional training

Have you received formal and specific training from your employer on agentic AI in the last 12 months?
(Percentage of respondents)



- Formal agentic AI-specific training received from employer
- No formal agentic AI-specific training received from employer

What additional training could you use related to agentic AI?
(Percentage of respondents)



Sample size: 93 service providers' employee references
Source: HFS Research, 2026

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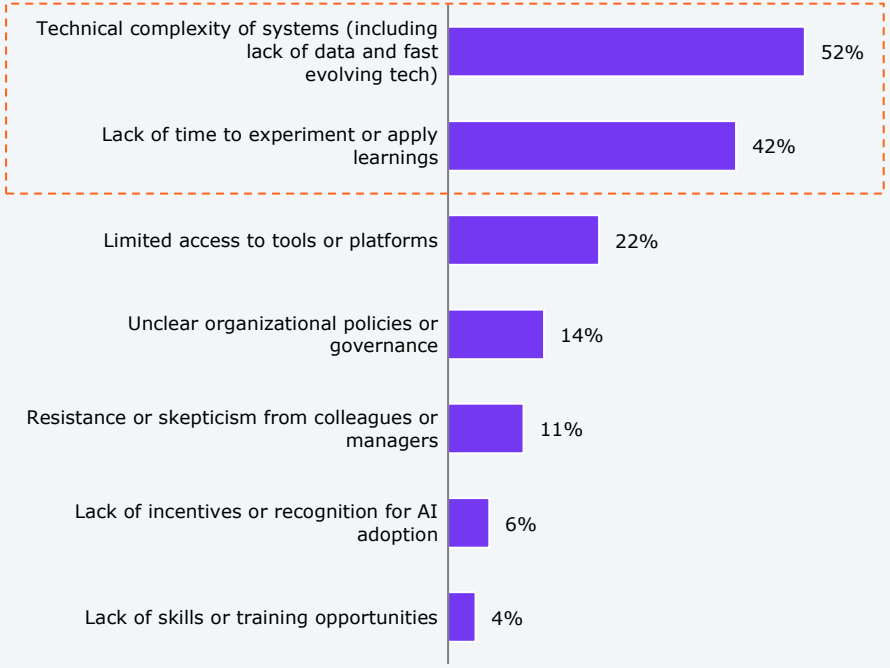
Technical complexity and lack of time are slowing down individual skills uplift, while gaps in training, incentives, internal infrastructure, and internal solutions impede organizational adoption

What are the biggest barriers you face in adopting agentic AI?
(Percentage of respondents)



What should you additionally do to improve the adoption of agentic AI within your organization?
(Percentage of respondents)

Sample size: 93 service providers' employee references
Source: HFS Research, 2026

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3 Horizons results: Agentic Services, 2026

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Summary of providers assessed in this report (1/2)

Providers	HFS point of view
Accenture	Industrializing agentic AI to reinvent enterprise platforms, processes, and outcomes at scale
Akkodis	Agentic services grounded in data platforms and governed execution
Ascendion	Agentic engineering platform delivering scaled modernization and measurable SDLC acceleration
Atos	Full lifecycle agentic services grounded in sovereign, secure enterprise delivery
Bain & Company	Agentic enablement for tech and business shift
BCG	Transformation consulting and integration strategy for agentic AI-led outcomes
Birlasoft	Domain-focused, task-oriented agentic and low-code delivery
Brillio	Enterprise agentic services built on data and application management
Capgemini	Ramping up automation maturity with scaled agentic AI for end-to-end process transformation
Cognizant	Expanding agentic AI capabilities with platforms, IP, context engineering, and enterprise controls

Providers	HFS point of view
EXL	Domain-rich, governance-first agentic AI partner for regulated, data-intensive enterprises
EY	Building AI-first, trusted agentic platforms that turn risk, tax, and finance expertise into software
Firstsource	Deep domain focus, proprietary agentic tooling, and scalable human-AI orchestration
Genpact	Scalable AI solutions grounded in operational discipline and domain expertise
HCLTech	Engineering-led agentic AI with reliability-by-design and data-ready scale
Hitachi Digital Services	Combining deep industrial expertise with governed operational agents across IT and OT
IBM	Governed agentic transformation enabled by modular architecture, vertical workflows, and integrated consulting
IGT Solutions	Productizing agentic AI to transform travel, hospitality, and customer experience
Infosys	Transforming business operations into AI-driven services through modular agentic platforms
Innova solutions	Business-led accelerated multi-agent workflows built on open frameworks

Note: All service providers are listed alphabetically

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Summary of providers assessed in this report (2/2)

Providers	HFS point of view
iOPEX	Delivering scalable agentic workflow automation with focus on data management and outcome alignment
KPMG	Agentic, outcome-driven transformation partner combining AI-first platforms and trusted governance
LTM	Bridging agentic AI strategy and execution with patented frameworks, productized components
McKinsey	Research-led, ecosystem-driven agentic AI delivery for governed enterprise transformation
Mindsprint	Multi-agent processes with operational control
Movate	CX-first agentic services spanning customer operations, engineering, and analytics
Mphasis	Embedding agentic AI across app development, IT infrastructure, and business operations
NTT Data	Delivering scalable agentic AI through a full-stack ecosystem, deep verticalization, and governed innovation

Providers	HFS point of view
Persistent Systems	Engineering-led agentic AI with scalable, governed execution
Publicis Sapient	Translating business strategy with scalable agentic platforms
PwC	Delivering agent-powered enterprise services with governance and proven impact
Sutherland	Operationally-grounded agentic AI with productized accelerators and built-in governance
TCS	Platform-neutral agentic ecosystem with accelerated build for fast-evolving tooling and rapid integration
UST	Driving intelligent automation by delivering governed, industrialized agentic AI with long-term commitment
Virtusa	Agentic grounded in domain depth and engineering rigor
Wipro	Consulting-led provider moving agentic AI into enterprise operations

Note: All service providers are listed alphabetically

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HFS Horizons: Agentic Services, 2026

Horizon 3 — Market Leaders

Horizon 3 service providers demonstrate:

- Horizon 2+
- Ability to embrace the emerging paradigm of **Services-as-Software** by leveraging agentic AI, with early evidence and clear roadmaps to redefine how work gets done, driving new sources of value and co-creation with **OneEcosystem** partners
- Innovation at the ecosystem level with value creation centered on collaboration, new revenue streams, and outcome-based models in driving business transformation

Horizon 2 — Enterprise Innovators

Horizon 2 service providers demonstrate:

- Horizon 1+
- Ability to enable the **OneOffice** model of end-to-end organizational alignment across the front, middle, and back offices by leveraging agentic AI to improve decision making and drive an unmatched stakeholder experience
- Innovation at the end-to-end enterprise level, with value creation focused on stakeholder experience, enterprise agility, improved compliance, and measurable business impact

Horizon 1 — Disruptors

Horizon 1 service providers demonstrate:

- Ability to drive digital transformation by leveraging agentic AI to improve business outcomes across elements of an industry's value chain
- Innovation on a function level with value creation measured by operational efficiency, cost savings, and improved productivity in targeted processes

Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, 2026

★ **SaS Stars** - Fundamentally changing its business models toward Services-as-Software by beginning to operationalize agentic capabilities, reduce reliance on human intervention, and move toward scalable, technology-led service delivery.

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HFS Horizons: Agentic Services, 2026

★ SaS Star
Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, 2026

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4 Horizons profiles: Agentic Services, 2026

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Accenture: Industrializing agentic AI to reinvent enterprise platforms, processes, and outcomes at scale

Strengths	Development opportunities
• **Value proposition:** Accenture positions agentic AI as an enterprise reinvention lever, embedding agents directly into end-to-end processes with governance, accountability, and measurable outcomes. • **Proof of scale, investment, and enterprise readiness**: Accenture reported $2.7 billion in FY25 revenue from advanced AI, underscoring accelerating enterprise demand for generative and agentic solutions. Recent investments include acquisitions such as NeuraFlash (to strengthen agentic sales and service execution on Salesforce) and Faculty (to deepen AI leadership and technical expertise). The company has expanded its strategic partnerships with NVIDIA and OpenAI to embed agentic AI into core enterprise platforms, including SAP, Salesforce, and ServiceNow. This momentum is reinforced by centralized agentic AI leadership, significant workforce upskilling, selective venture investments such as Aaru, and extensive internal adoption of Amethyst (Accenture's enterprise AI and agent orchestration platform), validating its approach at scale. • **Platformized agent ecosystem powering internal and client outcomes:** The company has built a reusable, platform-led agent ecosystem anchored in Amethyst, supported by Amethyst Studio and an Agent Gallery with Industry Agent Jumpstarters. This ecosystem enables model-agnostic orchestration across enterprise data, knowledge layers, and systems, with pre-configured agentic workflows spanning finance, supply chain, customer experience (CX), marketing, and regulated industries such as banking and insurance. Accenture reports 150+ agents live in production and 600+ in pilots, alongside industry-specific accelerators. • **Evidence of shift toward Services-as-Software:** Accenture embedded a multi-agent system that encodes operational decision making into software, enabling agentic AI-enabled execution and improving speed and productivity for a European auto manufacturer's operations in North America. • **Outcomes:** Accenture implemented agentic invoice validation for a major Japanese manufacturer, achieving 96% accuracy, a 50% reduction in AHT, and 20% lower cost savings. It deployed multi-agent order processing for a global medical devices firm, delivering 35% FTE reduction, revenue uplift of $280 million, and faster cycle times. • **Customer kudos:** Clients praise Accenture's consulting services and collaborative partnership. • **Partner kudos:** A partner noted that its expertise has been instrumental in helping clients quickly move AI projects from POC to global production, underscoring its commitment to innovation and customer success.	• **Deepen proof of reinvention at scale:** Accenture strongly frames agentic AI as a reinvention lever. Publicly named, KPI-rich production examples remain limited relative to claims. • **Demonstrate fully autonomous agent operations:** Accenture has strong enablement platforms (agent builder/industry agents) but fewer publicly documented examples of near-autonomous, end-to-end agent-run workflows. • **Accelerate Services-as-Software commercialization:** While SynOps is clearly positioned as a platform and increasingly agent-enabled, clearer product-style packaging and standardized commercial constructs can strengthen its Services-as-Software trajectory. • **Customer critiques:** Clients believe that the company must better communicate how it addresses the holistic data mesh needed for security as well as adaptability of cloud-delivered applications. • **Partner critiques:** One noted that scale makes it difficult to remain agile.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Google, AWS, Microsoft, SAP, Salesforce, Snowflake, IBM, Workday, Anthropic, Palantir, NVIDIA, OpenAI, Databricks, Mistral, Contextual AI, Druid AI, Virtue AI, ElevenLabs, Cresta, Lyzr	**2026: Faculty** **2025: NeuraFlash, Decho** **2024: Parsionate, Ammagamma** **2023: Redkite, Flutura, 6point6, Ocelot, Nextira** **2022: ALBERT, Tenbu, Ergo**	**Number of clients:** 1,300+ clients engaged in advanced AI **Key clients:** • Japanese housing materials manufacturer • Medical device manufacturer • European energy company • Multinational food processing • Global chemical company	**Headcount:** 80,000 data and AI specialists **Delivery and innovation locations by major geo:** 50+ delivery centers; AI Studios and Innovation Hubs in North America, Asia Pacific, Latin America, Europe	• **SynOps:** AI-driven automation platform combining agentic AI, analytics, and low/no-code capabilities for intelligent enterprise execution • **Amethyst Studio:** Internal platform for building and managing AI-powered business agents • **Intelligent Digital Brain:** Connected enterprise intelligence layer enabling autonomous, adaptive decision making. • **Industry Agent Jumpstarters:** Reusable agent accelerators

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Ascendion: Agentic engineering platform delivering scaled modernization and measurable SDLC acceleration

Strengths	Development opportunities
• **Value proposition:** Ascendion positions itself as an agentic engineering partner that integrates AI agents, codified processes, and human-in-the-loop orchestration to modernize legacy systems, accelerate SDLC, and improve product delivery velocity. • **Comprehensive SDLC automation capability:** Ascendion provides an integrated agentic engineering platform covering the full SDLC value chain. The platform is supported by specialized studios and thousands of reusable agents (e.g., code analysis and test generation). This gives enterprises a structured, scalable way to automate engineering workflows without relying on fragmented tools or custom-built components. • **Consistent delivery through standardized methods:** Delivery is reinforced by codified playbooks embedded directly into the AAVA™ platform and a deeply trained engineering workforce with 100% internal platform adoption. This enables cost-efficient delivery and faster outcomes as well as strong pricing resilience and competitive wins. • **Focused agentic modernization offerings:** Its three core solutions, namely agent-augmented legacy modernization, agentic data engineering, and agentic quality engineering, autonomous, context-aware workflows can accelerate modernization, streamline data transformation, and embed quality across the full SDLC. • **Evidence of shift toward Software-as-Service:** The AAVA™ platform reverse-engineered 700,000+ code lines, orchestrating large-scale modernization through software-defined workflows rather than staff-led execution. • **Outcomes:** Ascendion helped a UK retail bank reduce its test effort by 67% and boost metadata extraction 6x using agentic AI. It also modernized a 40-year-old wealth platform for a US bank, helping cut costs by 45%, and launched the platform in 18 months. • **Customer kudos:** Customers appreciate its strong leadership, quick response, and consistency in delivering the right expertise and efficiencies. • **Partner kudos:** Partners are impressed by its data and IT engineering scale, SME coverage, innovation consistency, agility, responsiveness, and outcome focus.	• **Expand growth-oriented outcome evidence:** While Ascendion demonstrates strong efficiency and velocity gains, it should consistently quantify its revenue uplift, CX improvement, and top-line growth through faster engineering execution. • **Increase ecosystem breadth:** Ascendion should partner with specialist agentic AI startups to accelerate innovation and avoid rebuilding capabilities already available in the market. • **Customer critiques:** A client wants Ascendion to strengthen its leadership continuity, tighten ROI validation, and communicate IP and pricing more clearly. • **Partner critiques:** Some partners expect the company to improve its hyperscaler/cloud alignment, brand visibility, contact center depth, joint architectures, sales execution, and talent readiness.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Google Cloud, Snowflake, Salesforce, Tricentis	**2025: Moodys Northwest Consulting** (digital product strategy and transformation consulting); **UXReactor** (enterprise UX design) **2023: Nitor Infotech** (GenAI-driven software product engineering services)	**Number of agentic services clients:** 20+ **Key clients:** • UK retail bank • US telecom provider • Digital-first US bank • Fortune 50 health plan • Global EdTech leader • Global technology company	**Headcount supporting agentic services only:** 3,000+ trained associates **Delivery and innovation locations by major geo:** 8 delivery centers in India, Philippines, Mexico 4 AI labs in Austin, Chennai, Hyderabad, Manila	• **AAVA™:** This is a modular, LLM-agnostic, agentic engineering platform that operationalizes autonomous multi-agent workflows across the entire SDLC. It delivers an end-to-end, contextualized catalog of agents that collaborate, reason, and act to accelerate engineering transformation at scale. Its offerings include agent-augmented engineering for legacy modernization and brownfield transformation, agentic data engineering and modernization, agentic quality engineering (QE) transformation, and domain-specific QE models.

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Capgemini: Ramping up automation maturity with scaled agentic AI for end-to-end process transformation

Strengths	Development opportunities
• **Value proposition:** Capgemini delivers enterprise-grade agentic AI deployment and emphasizes the shift from POC activity to production at scale through end-to-end process transformation rather than isolated use cases. It aims to address the limited automation maturity by moving clients to advanced operational models, delivering outcomes such as new products, predictive inventory management, and CX improvements. • **A scalable, reliable way to deploy multi-agent systems:** Capgemini has expanded its agentic AI capabilities with the launch of RAISE, a growing library of 400+ pre-built agents spanning domains (such as IT support), and enhanced orchestration and governance frameworks. It has deepened its partnerships with major hyperscalers and AI vendors, supported by co-creation programs (e.g., AWS agentic hackathons), new research labs, and scaled client deployments, demonstrating measurable operational and accuracy gains. Its recent acquisition of WNS adds deep process expertise, data preparedness, and domain-specific agentic modules and platforms such as SKENSE (for strategic intelligence) and MALKOM (for shipping operations) enabling operational integration. • **Enterprise-grade integration as a differentiator:** The company stands out for its ability to embed agentic AI into complex enterprise landscapes, particularly SAP, Salesforce, and legacy estates, using standardized A2A patterns, MCP-based tool abstraction, and mature governance, enabling production-grade multi-agent operations. • **Evidence of shift toward Services-as-Software:** A global pharmaceutical firm's IT service desk delivered 80% zero-touch automation and a 40% cost reduction. • **Outcomes:** Capgemini built a multi-agent system for one of India's largest airlines, reducing decision time by 70% and boosting productivity by 30% during travel disruptions. Its GenAI maintenance assistant helped a large American fast-food chain develop a chat-based troubleshooting and proactive guidance for equipment issues, aiming for £2 million in savings and a 60% reduction in incident rate. • **Customer kudos:** Clients appreciate its implementation, project management, and support capabilities. • **Partner kudos:** Partners are impressed by its deep technical acumen and ability to scale globally.	• **Demonstrate topline impact:** Capgemini has showcased solid operational gains outcomes. Given its focus on value, speed, and scale, it should present case studies that highlight new ways of working as well as topline growth. • **Strengthening productization and autonomous delivery models:** Capgemini has scope to evolve its agentic accelerators into standardized, autonomous products that deliver faster, scalable, repeatable enterprise outcomes. • **Customer critiques:** Some clients expect an improved stakeholder experience, especially in query handling. • **Partner critiques:** Partners find Capgemini a siloed organization. They also expect the firm to strengthen its partnerships and deepen its strategy consulting.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Google Cloud, Open AI, NVIDIA, Mistral AI, SAP, Liquid AI, Anthropic, Salesforce, Databricks	**2025: WNS** (AI-powered intelligent operations and BPO expertise); **Cloud4C** (cloud services and SAP); **Kipi** (Snowflake partner with strong data-related capabilities); **2024: Syniti** (enterprise data management software and services); **Lösch & Partner** (application lifecycle management and systems engineering) **2023: BTC** (cloud and digital end-to-end transformation) **2022: Braincourt GmbH** (data analytics capabilities); **The Smart Cube** (AI and analytics company); **Vuram** (expert in low-code automation, process consulting, and AI-enabled RPA)	**Number of clients:** Not disclosed **Key clients:** • Leading American fast-food chain • German multinational life sciences firm • India's largest passenger airline • One of Canada's largest banks • Dutch public services • Eneco eMobility • ABN AMRO • GlasfaserPlus	**Headcount:** 36,000–38,500 (data and AI professionals) **Delivery and innovation locations by major geo:** Global delivery centers in India, North America, UK, Europe, Singapore, Maylasia, Australia, MEA, LATAM; 90+ research labs, including GenAI labs in Netherlands, Brazil, US	• **RAISE:** Modular GenAI/agentic AI engineering platform to build, orchestrate, monitor, govern, and control cost for scalable enterprise deployments • **Agentic Gallery:** Library of pre-configured agents for rapid prototyping, deployment, and integration; includes horizontal agents plus vertical/industry agent solutions • **Connected Customer Journey:** Cloud solution to unify/clean customer data and optimize end-to-end journeys • **IDEA (Industrialized Data & AI Engineering Acceleration) framework:** Suite of accelerators to modernize and govern enterprise data estates • **SKENSE**: Agentic solution for use cases requiring unstructured data extraction and contextualisation across industries • **Malkom.ai**: Intelligent automation platform for end-to-end shipment life cycle

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Cognizant: Expanding agentic AI capabilities with platforms, IP, context engineering, and enterprise controls

Strengths	Development opportunities
• **Value proposition:** Cognizant sets a clear direction for enterprises with a three-part AI vision focused on improving software productivity, moving to an agentic operating layer, and tapping new labor models. Its Agentification framework and 6D method give organizations a unified way to link strategy, operating model, governance, and technology without disconnected use cases. • **Sustained capability expansion in agentic AI:** Cognizant's Enterprise Agentification framework, Agent Foundry, and Neuro AI highlight end-to-end capabilities across strategy and design with build, integrate, and run with governance built in. It has a library of 350+ reusable agents, supported by 75+ AI patents, global innovation labs, and industry platforms such as StoreNEXT and TriZetto AI Gateway. Deep partnerships with hyperscalers, NVIDIA, and Workfabric, along with a world record-setting vibe coding initiative (~53,000 participants), demonstrate ongoing investments in talent and execution. • **Enterprise controls and architecture for safe, scalable agentic AI:** Cognizant stands out for its Enterprise Agentification framework, integrated platform stack, emphasis on context engineering, and ability to reinvest savings to advance broader agentic adoption. Its responsible AI standards, ISO 42001 certification, and ability to integrate across complex IT landscapes enable robust governance, scale, and system interoperability. • **Evidence of shift toward Services-as-Software:** Cognizant developed a multi-agent architecture for a UK-based financial institution handling over 40% of customer interactions, enabling higher throughput, improved CX, and scalability. • **Outcomes:** Cognizant deployed a multi-agent retail contact center stack to automate post-purchase journeys for a US-based retail brand. The client was able to handle ~40% of interactions digitally, easing agent load and improving customer satisfaction. For one of the largest mutual fund and investment companies in the UK, Cognizant used agentic reviewers to automate FCA-compliant content checks, reducing costs and approvals from weeks to minutes, and lift first-draft approvals to 80%. • **Customer kudos:** Xerox credits Cognizant's deep expertise, clear roadmap, and tools for modernizing Snowflake, reducing complexity, speeding up compliance, and enabling real-time insights. • **Partner kudos:** Partners praise Cognizant's repeatable AI productization, process/change leadership, industry depth, bold leadership bench, fast idea to client execution, and strong data and transformation capabilities.	• **Expand growth-oriented outcome evidence:** Despite strong efficiency gains and productivity improvements, Cognizant should work toward consistent reporting of revenue, improving CX, and top-line growth outcomes. • **Strengthen strategic and lifecycle roadmap:** The company would benefit from a clearer, end-to-end agentic roadmap and a more unified lifecycle narrative supported by stronger consulting-led guidance for strategy and transformation, not just delivery. • **Customer critiques:** Clients expect the company to manage attrition and are looking for co-innovation. • **Partner critiques:** Partners want stronger advisory, flexible deals, faster bold execution, quicker decisions, and better talent upskilling/retention.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, NVIDIA, ServiceNow, Salesforce, WRITER, Workfabric, C3.ai	• **2025: 3Cloud** (expert in Azure managed services) • **2024: Belcan** (digital engineering capabilities in aerospace, defense, space, marine, and industrial markets); **Thirdera,** (ServiceNow consulting and AI-driven workflow automation specialist) • **2023: Mobica** (IoT software engineering and embedded software development specialist) • **2022: AustinCSI** (premier digital transformation consultancy)	**Number of clients in direct relation to agentic services:** 150–200 **Key clients:** • Leading North America–based investment and insurance client • Leading US-based retail brand • Major food ordering client • Global biopharmaceutical company • Leading healthcare provider	**Headcount supporting agentic services only:** 1,500+ **Delivery and innovation locations by major geo:** 170+ delivery centers with major presence in US, UK, India Six AI Innovation Studios to inspire, ideate, and research with clients, including Cognizant AI Ops Experience Studio in Bangalore, Advanced AI Lab in San Francisco, and GenAI Lab in Amsterdam	• **Agent Foundry:** Provides a standardized environment to design, build, and manage enterprise-grade agents • **Neuro® AI Multi-Agent Accelerator:** Enables teams to rapidly assemble and scale multi-agent systems using no-code, pre-built agent networks • **Cognizant Neuro® AI Engineering:** Allows enterprises to embed AI into apps and workflows, connecting data and operational systems seamlessly • **Neuro CX:** Tracks and evaluates agent behavior to ensure quality, reliability, and performance across training and production • **Other solutions:** StoreNEXT (retail), HealthNEXT (healthcare), and TriZetto AI Gateway (insurance)

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EY: Building AI-first, trusted agentic platforms that turn risk, tax, and finance expertise into software

Strengths	Development opportunities
• **Value proposition:** EY leverages its deep sector/domain expertise in risk, tax, finance, audit, and operations to help clients transform themselves into AI-first enterprises. It builds trusted and continuously improving agentic systems that deliver 10x speed, scale, and assurance, with auditability, governance, and safety built in from day one. • **Holistic debt removal and continuously learning agentic foundation:** EY's agentic framework tackles the full stack of enterprise debt (tech, data, process, and people) through its platform, AI-ready data, process reinvention, EY.ai Value Blueprints, workforce model, and governance. This integrated approach enables clients to adopt agentic AI safely, efficiently, and at an enterprise scale. It is co-engineering with NVIDIA to deliver domain-tuned small language models (SLMs). A continuous-learning data flywheel improves agent accuracy, reliability, and scalability beyond static models. • **Trusted, domain-led impact at enterprise scale:** EY delivers production-grade outcomes across risk, tax, and finance through its core offerings: Agentic TPRM, Agentic Tax, and Agentic Enterprise, strengthened by its audit heritage and a confidence engine that enforces verification, explainability, and outcome reliability. • **Scaled commitment, ecosystem depth, and invest-to-grow execution:** EY demonstrates solid commitment to agentic AI, supporting 275+ clients through AI Engine Rooms, deep ecosystem partnerships (Microsoft, NVIDIA, Dell, SAP), workforce enablement at scale (~400,000 trained employees), productized IP such as EY.ai, and targeted acquisitions such as Nuvalence and Kreatif. • **Evidence of shift toward Services-as-Software:** EY.ai for Tax productizes codified tax expertise into recurring, agent-led, platform-based delivery. • **Outcomes:** EY deployed AI-enabled assessors for a global ride-share firm, cutting due diligence time by 32% across 2,800+ assessments of third-party engagements. For a US investment bank, it enabled agentic AI automated code migration and testing, delivering 10x productivity and 85% mapping accuracy. • **Customer kudos:** A client acknowledges its transparency, responsiveness, and collaboration, highlighting its strong technical and tax expertise, accountability, and openness to feedback. • **Partner kudos:** Not available as partners didn't respond to interview requests.	• **Showcase net-new revenue and growth outcomes more explicitly:** EY should highlight growth outcomes better, as current materials emphasize efficiency and risk gains. • **Showcase and productize industry-first narratives:** While EY has deep sector expertise and embedded vertical IP, it must showcase clearer, branded, industry-specific product stories beyond function-led platforms and capabilities. • **Customer critiques:** Clients noted that EY's scale and partnerships can slow coordination, causing occasional over-commitment and delivery delays, even though expectations are ultimately met. • **Partner critiques:** Not available as partners didn't respond to interview requests.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Key partners: Microsoft, IBM, NVIDIA, ServiceNow, Dell, Snowflake, Databricks, UiPath	**2025: Kreatif Dinamika Integrasi,** (Tech and digital transformation, Microsoft Azure services); **KansoCloud** (cloud migration) **2024: Nuvalence** (platform engineering, GenAI); **BGP** (management consulting, SAP solutions) **2023: Tallan** (Microsoft Azure, cloud modernization) **2022: Bridge Business Consulting** (data analytics, AI solutions); **Quantitative Scientific Solutions** (scientific, engineering analytics); **Fabernovel** (digital transformation); **Gensquared** (data strategy and analytics consulting)	**Number of agentic services clients:** ~275 **Key clients:** • Transportation major • Insurance major • Automotive major • Investment banking major • Financial services major	**Headcount supporting agentic services only:** 2,500+ **Delivery and innovation locations by major geo:** 32 delivery centers in Americas (14), EMEA (13), APAC (5) EY.ai Lab in Georgia, US; 50+ EY wavespace™ centers	• **EY.ai Agentic Platform:** Manages and executes AI agents across enterprise processes using integrated data, logic, and governance controls; powers EY's sector and functional solutions • **EY.ai Risk:** Identifies, assesses, and mitigates business and regulatory risks through AI-driven analytics and reporting • **EY.ai for Tax:** Uses IBM watsonx to automate tax compliance, fixed asset accounting, and financial reporting • **EY.ai Workforce:** Guides reskilling and role alignment • **EY.ai Enterprise Private (EEP):** Provides a secure, private AI infrastructure for training and deploying enterprise-grade models • **EY.ai Telecom:** Suite of AI agents for telcos

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HCLTech: Engineering-led agentic AI with reliability-by-design and data-ready scale

Strengths	Development opportunities
• **Value proposition:** HCLTech enables enterprise AI adoption through agentic platforms that can automate workflows, unify data, and deliver measurable productivity, quality, cost, and revenue outcomes, guided by a structured, ROI-driven approach with built-in responsible AI practices. • **Demonstrated agentic AI capabilities with measurable business impact:** HCLTech made $100 million+ in quarterly AI revenue via platforms (e.g., AI Force) and IP (e.g., Clinical Advisor and InsightGen). Its AI Factory, Journey to Value framework, and partners such as OpenAI, NVIDIA, and Snowflake enable enterprise-scale deployment. Strategic acquisitions such as Zeenea (data governance) and Starschema (data engineering) strengthen its ability to unify data and accelerate AI readiness. • **Engineering-led execution and technical depth:** HCLTech brings strong engineering DNA to agentic AI, building full-stack platforms with modular orchestration, LLMOps, observability, and secure integration. Its technical rigor is evident in frameworks such as Agentic Reliability Engineering, Safe Autonomy, and multi-agent orchestration. • **Evidence of shift toward Services-as-Software:** AI Force is a productized platform that delivers and automates services while leveraging licensing and reusable capabilities such as SDLC, ITOps, BusinessOps, SAP, and MedTech. • **Outcomes:** HCLTech set up a consolidated GenAI assistant platform for a European power-products firm and built a legal contract assistant to automate review, drafting, and summarization, reducing manual legal work and enhancing productivity. Its Clinical Advisor used RAG, an agentic framework, and FHIR (Fast Healthcare Interoperability Resources) integration to reduce clinician search time by 60% and deliver ~$50 million in ROI for a large healthcare provider. • **Customer kudos:** Clients are impressed by its highly skilled, business-savvy teams that integrate smoothly into their platform and work hand in hand with internal developers. • **Partner kudos:** Partners praise its innovation focus, strong market presence, hyperscaler expertise, proven delivery, deep transformation experience, proprietary automation frameworks, and unique GSI–ISV strength backed by partnerships.	• **Amplify messaging with business outcomes:** HCLTech's narrative highlights its technical depth and platform maturity. To appeal to business leaders, it must emphasize outcomes such as revenue growth and operational impact. • **Enhance segment relevance with tailored storytelling:** Enterprises in CPG, BFSI, and healthcare will see greater value when the offerings are articulated through industry-specific terms linking agentic AI directly to domain workflows and measurable outcomes instead of broad, cross-sector messaging. • **Customer critiques:** Some clients expect it to scale up resourcing quickly, reduce delivery silos, and align teams behind a single coherent approach. • **Partner critiques:** Some partners want the company to expand into new emerging geos, lift brand visibility vs. larger rivals, and strengthen its AI/cloud talent attraction/retention.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
OpenAI, Google Cloud, Anthropic, Meta, IBM, Microsoft, AWS, NVIDIA, Dell, HPE, AMD, SAP, Salesforce, ServiceNow, Snowflake, Databricks, MIT NANDA	**2025: Nuance Communications** (enterprise professional services) **2024: Zeenea; HPE Communications Technology Group (CTG)** **2022: Confinale AG; Quest Informatics; Starschema**	**Number of agentic services clients:** 60+ **Key clients:** • European power-products manufacturer • Large healthcare provider • Global investment bank • Global biopharma company • Global digital payments leader	**Agentic services headcount:** ~2,000 (agentic AI developers, AI architects, applied AI researchers, responsible AI specialists, red teamers, agent reliability engineers [AgentOps]) **Delivery and innovation locations by major geo:** 10+ across India, US, Europe, and other growth markets; six global AI labs in Santa Clara, Austin (AI data center), New Jersey, London, Munich, Noida, Singapore	• **AI Force:** Flagship agentic AI platform that automates and augments IT operations, software development, and business processes using pre-built AI agents, GenAI models, and responsible AI frameworks • **AI Factory:** Full-stack agentic platform for enterprises and governments (with NVIDIA, HPE) • **RL Agentic:** Reinforcement learning-powered automation for QA, mobile testing, and games • **Agentic Reliability Engineering (ARE):** Framework for safe autonomy and agent reliability • Industry-specific solutions such as Clinical Advisor, InsightGen, VisionX, and Legal AI Assistant

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IBM: Governed agentic transformation enabled by modular architecture, vertical workflows, and integrated consulting

Strengths	Development opportunities
• **Value proposition:** IBM accelerates agentic AI adoption by unifying cross-platform orchestration, strengthening governance and transparent control, and accelerating time-to-value across complex enterprise ecosystems through IBM Consulting Advantage (ICA). • **IBM's agentic AI advantage:** The company demonstrates its depth in agentic AI by making significant investments in ICA, extensive IP, and pre-built agentic templates (e.g., self-service AI for CX), open multi-agent architecture (MCP/A2A standards), hyperscaler co-creation (e.g., Azure, AWS), 12K+ agentic AI-skilled talent, and proven internal-at-scale usage by 100K consultants. All these are supported by strategic M&As (Neudesic, Hakkoda, Octo) and global innovation centers. In late 2025, it enhanced watsonx with Anthropic's Claude integration, Project Bob (AI-first IDE), and Project Infragraph (agentic control for hybrid infrastructure). • **Integrated and evidence-backed technical strength:** IBM leverages its rich heritage in enterprise data, integration, and responsible AI to deliver an end-to-end agentic stack. Structured assessments (technical readiness, use-case viability, value sizing, risk posture), strong governance (control tower, guardrails, evaluation, drift detection), and reusable data-product foundations sit on ICA Agentic Core, App Studio, and Control Tower, supported by watsonx, an open multi-cloud, multi-agent architecture, and deep industry consulting expertise. • **Evidence of shift toward Services-as-Software:** Using DocuFlow-AI, IBM ICA delivered 70% straight-through processing, 95%–98% classification accuracy, and API-driven ingestion for a financial services client. • **Outcomes:** A CPG client increased containment to >60% and reduced agent interactions by 52% in the call center through IBM's Self-Service AI template. A global pharma shortened its FDA submission cycles from eight months to two months through the Regulate-AI agentic workflow. • **Customer kudos:** Clients appreciate its strong knowledge, commitment, effective communication, and high transparency and flexibility in engagements. • **Partner kudos:** Partners applaud its enterprise transformation breadth, deep industry expertise, and advanced AI integrations through platforms such as watsonx and ICA.	• **Clearer technology-flexibility:** IBM often emphasizes internal platforms in client examples. At the same time, it should build client trust by visibly demonstrating ICA's flexibility to use non-IBM technologies based on customer preferences. • **Human-AI operating model clarity:** The company can further codify clearer frameworks, roles, and change-management practices for human–agent collaboration to match the maturity of ICA's technical and governance capabilities. • **Customer critiques:** Customers cited challenges such as difficulty in accessing remote talent in certain regions and slow internal legal processes. • **Partner critiques:** Partners pointed to IBM's tendency to favor watsonx and internal tools over hyperscaler options, alongside slow industry-cloud expansion and low POC-to-production conversion rates.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Google Cloud, SAP, Oracle, Salesforce, Adobe, Palo Alto Networks, ServiceNow, Workday, Hugging Face, Meta, Mistral AI, NVIDIA, Snowflake, Databricks, Dell	**2025: Hakkoda** (enterprise data and AI consulting services); **Hashicorp** (integrating tools for multi-cloud management) **2024: Skyarch** (AWS cloud expertise); **Modern** Systems (data and mainframe application modernization) **2023: Agyla SAS** (cloud professional services) **2022: Sentaca** (telco consulting services and solutions); **Neudesic** (Azure-native cloud consultant); **Octo** (digital transformation provider focused on federal government clients)	**Number of clients:** Not disclosed **Key clients:** • Elevance Health • US Department of Veterans Affairs • Pepsico • Wintershall Dea • Moderna • NASA • Citibank • The Masters, US Open, Wimbledon	**Headcount:** 12K+ in agentic services **Delivery and innovation locations by major geo:** • America: 6 Client Innovation Centers (CICs) • EMEA: 12 CICs • APAC: 15 CICs • IBM AI Innovation Centers in 41 countries	• **ICA (IBM Consulting Advantage):** Modular platform supporting the full lifecycle of agentic workflows • **ICA Agentic App Library:** Pre-built agentic templates to accelerate domain-specific use-case delivery • **ICA Agentic App Studio:** Low-code canvas to design, compose, and deploy multi-agent workflows • **ICA Agentic Core:** Orchestration and integration platform for agentic workflows • **ICA Context Studio:** Low-code canvas to define and manage context for agents • **ICA Control Tower:** Governance and observability layer for safe, compliant agent operations

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Infosys: Transforming business operations into AI-driven services through modular agentic platforms

Strengths	Development opportunities
• **Value proposition:** Infosys helps enterprises scale using agentic systems to automate complex workflows, reduce operational drag, and transform knowledge into action to deliver measurable impact across business and IT services, and infrastructure. • **Agentic AI embedded in enterprise-scale platforms:** Platforms and accelerators such as LEAP, APOC, and Cortex incorporate agentic AI using modular microservices, task-specific agents, and event-driven architectures. These agents perform real-time reasoning, anomaly detection, and decision automation across IT, finance, and customer service functions, reducing manual escalations and enhancing system responsiveness. The platforms have substantial client traction; for e.g., LEAP has 75+ deployments and APOC processed 10 million+ invoices and $80 billion in supplier payments annually. • **Governed multi-agent systems with internal validation:** Platforms such as Agentic Foundry and Exponential Engineering are built on multi-agent orchestration frameworks with embedded Responsible AI (RAI) controls. These are first deployed and then enhanced internally to ensure compliance and faster time-to-value. Infosys also combines deep partnerships with large-scale AI upskilling, agent-building programs, and FDE roles to industrialize agentic AI delivery. • **Evidence of shift toward Service-as-Software:** APOC is a multi-tenant, software-led accounts payable (AP) automation solution with embedded AI-driven, agentic orchestration capable of operating at a global scale. • **Outcomes:** For a global technology conglomerate's product-support operation, Infosys deployed an agentic AI research agent to automate case investigation and route to experts, reducing MTTR by 50%. For a North American industrial manufacturer's RFQs, its multi-agent RFQ extraction, automated parsing, and validation drove an 80% reduction in manual effort and improved accuracy by over 90%. • **Customer kudos:** Customers applaud Infosys' deep technical, Azure-DevOps expertise, strong agent evaluation, trusted partnerships, scalable execution, rapid resourcing, and sharp thought leadership. • **Partner kudos:** Partners acknowledge its strong domain expertise, AI talent, digital platforms, and vertical agentic AI solutions.	• **Broaden agentic AI use cases:** Operational efficiency is important, but there is a huge opportunity to explore more transformative agentic applications in areas such as product innovation, new business models, and strategic transformation. • **Evolve human-agent interaction models:** Infosys should enhance its structured change management programs to support user role evolution, adoption readiness, and seamless integration of human-agent collaboration across functions. • **Customer critiques:** Some clients expressed a need for reduced dependence on LLMs via controllable SLMs, a more consultative approach with ROI-led guidance, better outcome alignment, expanded agentic talent, and affordable US-based delivery. • **Partner critiques:** Partners expect the company to boost its AI marketing, accelerate innovation, retain/upskill talent, improve cost perception, diversify across geographies, and deepen mid-market reach.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, Google Cloud, AWS, NVIDIA, Anthropic, Meta, Salesforce, ServiceNow, Cognition	**2025: MRE Consulting** (expertise in energy and trading, enabling AI agents to support complex financial ops decisions); **The Missing Link** (ensures secure deployment and governance agentic AI systems) **2024: inSemi** (semiconductor and AI solutions); **in-tech,** (engineering R&D services) **2022: BASE life science** (health data and AI consulting)	**Number of clients:** Not disclosed **Key clients:** • Multinational professional services firm • North American technology company • European telecom company • APAC-based financial services company • APAC-based restaurant operator	**Headcount:** ~27,000 certified AI Builders (advanced AI solution building capability) **Delivery and innovation locations by major geo:** 292 delivery locations in 59 countries; Living Labs (to co-create AI solutions in real enterprise conditions as opposed to isolated pilots) has 100+ clients	• **Infosys Topaz Fabric:** Stack of layered, composable, open and interoperable data infrastructure, models, agents, and AI apps to accelerate IT service delivery • **Agentic Foundry:** Foundational enterprise platform with pre-trained models and a large library of AI assets such as vertical agents and horizontal skills • **LEAP (Live Enterprise Automation Platform):** AI-assisted, cloud-enabled platform for next-gen application management services and modernization • **AIOps Insights:** AI-powered observability/operations platform for IT environments • **iLEAD (Infosys Live Enterprise Application Development):** Platform for application development and modernization with accelerators and AI assistance • **Accounts Payable On Cloud (APOC):** AI-assisted cloud-based solution for AP

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KPMG: Agentic and outcome-driven transformation partner combining AI-first platforms and trusted governance

Strengths	Development opportunities
• **Value proposition:** KPMG positions itself as a "trusted journey partner," guiding clients from AI strategy to measurable outcomes. The company leverages its client zero transformation and persona-based, platform-enabled delivery approach under a unifying vision for the intelligent enterprise. • **Ecosystem-driven innovation and solid investments:** KPMG is accelerating its growth through agentic AI IP (such as Mystro), scaled accelerators, and strong engineering talent, supported by co-innovation with hyperscalers and major SaaS platforms and tech partners. KPMG Ventures investments (e.g., Ema, Auditoria; reinforced by ISO/IEC 42001 certification) and acquisitions (Metaphor Data, Ydata, and LlamaZOO) are enhancing its data and AI capabilities. • **Proven, governed enterprise AI with robust agentic platform:** KPMG stands out for its client-zero validated transformation model, deep domain and regulatory expertise across audit, tax, and advisory, and AI-enabled platforms (Clara, Digital Gateway, and Velocity). • **Evidence of shift toward Services-as-Software:** KPMG's Workbench platform (built on Microsoft Foundry) offers a mature, multi-model agentic platform with registries, observability, and integrations, supported by 50+ functional agents and accelerators, delivering up to 65% productivity gains and 85% automation under trusted AI governance. • **Outcomes:** A top UK advisory firm cut service effort by up to 85% using agentic AI, transforming audit, forensics, and strategy delivery through a software factory model, accelerating investigations and delivery across core advisory functions. A global cloud software leader improved its compliance speed, accuracy, and risk detection by integrating agentic AI with its data estate to automate testing, evidence capture, and reporting. • **Customer kudos:** Customers appreciate its innovative and scalable solutions, deep technical insights, ability to work seamlessly with their teams, and trusted leadership while navigating complex transformations. • **Partner kudos:** Partners applaud its deep industry expertise, trusted advisory strength, global scale, and strong innovation and investment in agentic AI solutions.	• **Enhance speed-to-value story:** KPMG has rich frameworks but can further articulate how its platforms, agent factories, and co-development models accelerate delivery cycles, making "speed with assurance" a clearer differentiator. • **Expand business value articulation:** KPMG effectively showcases efficiency, productivity, and control (hours saved, automation rate, governance). Further quantifying the agentic AI impact on ROI, revenue growth, margin improvement, and CX can enhance resonance with business leaders. • **Customer critiques:** Clients expect the company to be upfront on risk transparency and strengthen its change management. • **Partner critiques:** Some partners want better responsiveness and pricing flexibility for the mid-market.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, Google Cloud, Salesforce, SAP, Oracle, Workday, ServiceNow, Fieldguide, Cranium, Ema, Rhino.ai, Wokelo, LlamaIndex, Auditoria, Opkey, Uniphore	**2025: Metaphor Data** (specialist in enterprise data mesh platforms and AI-driven metadata management); **YData** (specializes in synthetic data); **LlamaZOO Interactive** (AI-enabled spatial business intelligence systems and digital mapping decision-making tools)	**Number of clients:** Not disclosed **Key clients:** • Leading UK-based bank • US-based insurance brokerage • Global casino and gaming company • Public sector client in APAC • Leading US healthcare provider • Global software company • Leading German direct bank • Large multi-national retailer	**Headcount:** 40,000+ technology consulting professionals globally **Delivery and innovation locations by major geo:** 16 global delivery centers, 29 innovation labs, 10 AI and data labs Split percentage: 25% in Americas, 46% in EMEA, 29% in APAC	• **KPMG Clara:** Cloud-based audit platform embedding agentic AI capabilities • **KPMG Digital Gateway:** Unified tax technology platform that integrates AI agents • **KPMG Velocity:** Emerging AI/agentic AI-enabled business transformation platform • **KPMG Trusted AI Framework:** Ensures auditability, risk controls, explainability, and compliance of AI agents • **KPMG Workbench:** Enterprise AI platform to build, operate, and govern agentic systems • **MYSTRO:** Digital colleague for workforce transformation, delivered through a specialized agentic solution • **Accelerators and frameworks:** RVA (Rapid Value Assessment for agentic AI), TACO (framework to classify and deploy agentic systems), AI/Agent Factory, AI Assurance • **Other offerings:** AI Jumpstart, AI Strategy, AI Trust, AI Workforce, AI Technology

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NTT DATA: Delivering scalable agentic AI through a full-stack ecosystem, deep verticalization, and governed innovations

Strengths	Development opportunities
• **Value proposition:** NTT DATA is a single accountable provider, offering consulting-to-infrastructure-to-orchestration agentic AI with pre-built assets, curated partner integrations, and verticalized accelerators for faster time-to-value and reduced risk. • **Enterprise-grade agentic AI delivery at scale:** Backed by a full-stack ecosystem, deep vertical specialization across 15 industries, and embedded governance (AgentOps, user-in-the-loop), NTT DATA ensures safe, scalable, and compliant implementations and deployments. It has committed JPY8 trillion to R&D for the next five years, focusing on AI, GenAI, and robotics. Additionally, the client-zero operating model of internal-first testing of patterns, reusable agentic architectures, and governance minimizes risk and accelerates transformation through lived experience. • **Ecosystem-led innovation with strategic and tactical ROI focus:** NTT DATA combines hyperscalers, startups (e.g., CrewAI, LangGraph), and in-house IP into a modular agentic AI stack. It applies a dual lens: a strategic lens for scale and governance and a tactical lens for fast ROI, offered through a continuum of bespoke, turnkey (speed-focused), and managed service models. • **Evidence of shift toward Services-as-Software:** NTT DATA's autonomous multi-agent system can execute emergency response plans continuously, replacing manual coordination with software-embedded service logic. This significantly reduces the response times and operator cognitive load through always-on, scalable, software-delivered emergency services. • **Outcomes:** A UK-based TV platform needed scalable psychographic profiling for eight million users. NTT DATA developed a multi-agent profiling system that reduced manual effort, improved the targeting accuracy, and increased ad engagement and ROI. For a public-safety agency that needed faster, consistent incident responses, it deployed a multi-agent assistant to extract data, draft reports, and unify sources, improving decision accuracy and reducing response time and operator workload. • **Customer kudos:** Clients praise its innovative mindset, partnerships, collaboration, and an engaged and capable team. • **Partner kudos:** Partners praise its cloud depth, agentic-AI expertise, global scale, and strong Google-powered end-to-end AI transformation capabilities.	• **Convert C-level buyer interest into confidence, persuading them to commit:** Bridging the gap between technical credibility and executive-level conviction will help NTT DATA drive decision making and investments. The company should further highlight its private AI deployments or the client-zero model to stand out. • **Move from "capability rich" to messaging around proven business impact for stronger market positioning:** While the current value proposition of the four-pillar model is strong on technical implementation, NTT DATA must better articulate its ability to deliver business value at scale. • **Customer critiques:** Some clients are looking for faster automated reporting and continuous improvements of implemented solutions and tools. • **Partner critiques:** Partners want to see increased sales resources with AI skills and a better articulation of agentic AI client stories.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, NVIDIA, OpenAI, CrewAI, Databricks, Kore.ai, LangGraph, Mistral AI, Snowflake, Plug and Play, Rafay Systems, Salesforce, Weights & Biases, ServiceNow, IBM, Fortinax, Cisco, Dell	**2025: EXAH** (Salesforce consulting partner and AI implementation specialist); **Niveus Solutions** (cloud engineering company specializing in Google Cloud Platform) **Alchemy Technology Services** (insurance technology consultancy) **2024: ProvenTech** (IT consulting and software solutions) **2022: Aspirent** (data analytics, digital product development, management consulting/strategy); **Vectorform** (digital transformation and innovation)	**Number of agentic AI clients:** 1,100–1,200 **Key clients:** • One of the largest humanitarian networks • Emergency response unit of a European company • Large telecom company in the UK • Manufacturing and CPG company of Spain	**Headcount:** 197,000+ professionals, including 40,000+ skilled delivery professionals, 10,500+ professionals dedicated to GenAI across data and AI, consulting, and delivery, with 2,000–2,500 FTEs focused on creating and delivering agentic AI solutions **Delivery and innovation locations by major geo:** Global delivery network in 25+ countries; global innovation centers in 11 locations	• **Smart AI Agent™ Ecosystem:** Provides a multi-layer, multi-partner foundation for designing, deploying, and orchestrating autonomous agents • **GenAI Tech Hub, Agent Marketplace, and Agentic Workflow Platform (AWP):** Low-code workbench for technical teams with governed catalogs for agents/tools/use cases • **Syntphony (eVa) platform:** Conversational AI • **Agentic AI Services for Hyperscaler AI Technologies:** Cloud-managed services suite for agentic AI, leveraging hyperscaler AI technologies • **Agentic AI Factory:** Repeatable blueprints, cloud-native orchestration, integrated governance framework • **Tsuzumi 2:** Lightweight, high-performance LLM

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Publicis Sapient: Translating business strategy with scalable agentic platforms

Strengths	Development opportunities
• **Value proposition:** Publicis Sapient helps enterprises move agentic AI from experimentation to production through governed, end-to-end agentic services spanning strategy, build, deployment, and run across complex enterprise environments. • **Platformized agentic delivery:** The multi-platform stack includes Bodhi (enterprise agentic platform), Sapient Slingshot (platform applying agents across the modernization lifecycle), and CoreAI (purpose-built marketing agents). These are supported by 1,000+ curated prompt templates, pre-trained agentic bundles (across modernization, business transformation, and marketing transformation), ~25,000 AI-trained practitioners, 15 dedicated innovation centers, global delivery centers, and recent acquisitions expanding data, cloud, and AI engineering capabilities. • **Cohesive agentic operating model:** Publicis Sapient operationalizes enterprise context intelligence across customer experience, SDLC, and legacy modernization. It connects agents to live enterprise systems via a connected data network and embeds centralized policy enforcement, telemetry, evaluation, and HITL controls to govern execution while enabling continuous optimization into run operations through SustainAI. • **Evidence of shift toward Services-as-Software:** Legacy modernization and marketing operations are productized as Bodhi and CoreAI software modules and embedded across client engagements. The company has three live subscription clients and reported that >30% of services delivery revenue was linked to software components in 2025. • **Outcomes:** A global institutional investment company achieved 20%–30% developer productivity gains, 30%–40% unit cost efficiency, and 70%–80% faster delivery using agentic SDLC workflows. A large US healthcare enterprise achieved 3x faster legacy migration and >50% cost reduction using agentic modernization. • **Customer kudos:** Clients highlight Publicis Sapient's ability to quickly understand business context, supported by strong relationship management, a deep engineering bench, and effective problem-solving skills. • **Partner kudos:** A partner values its ability to translate business strategy into scalable solutions, backed by strong platform expertise, co-innovation, and end-to-end delivery ownership.	• **Make industry context explicit in agentic delivery:** While agentic execution spans CX, SDLC, and legacy modernization, clearer articulation of industry-specific regulatory, business-rule, and governance context can strengthen buyer confidence in deploying agents across regulated environments. • **Formalize Human + AI change models:** While agentic execution is strong, the company underemphasizes structured frameworks for human-agent collaboration, role redesign, decision rights, and change management needed to sustain adoption. • **Customer critiques:** Clients note the need to sharpen cost optimization and strategy development while emphasizing the need for earlier escalation of delivery risks. • **Partner critiques:** A partner sees scope for packaging bespoke co-innovations into scalable offerings, strengthening the joint GTM, and better integrating advanced services into standard delivery.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, Adobe, Salesforce, NVIDIA	**2025: Moov AI** (Canadian AI and data solutions) **2024: Spinnaker** (advanced AI and ML analytics, digital supply chain modernization and transformation) **2023: PS AI Labs** (AI R&D joint venture launched in 2020; in partnership between Publicis Sapient, Elder Research, and Tquila)	**Number of clients:** Not disclosed **Key clients:** • Leading US healthcare and insurance provider • Major European investment and financial services institution • Leading Canadian financial institution • Leading pharmaceutical company	**Headcount:** Not disclosed **Delivery and innovation locations by major geo:** • 15 innovation centers • Global delivery distributed across North America, Europe, Middle East and APAC • Delivery centers also in India, LATAM, Eastern Europe	• **Sapient Slingshot:** Integrated ecosystem of AI tools spanning SDLC, designed to amplify expertise, preserve context, and seamlessly carry it forward through pluggable AI agents • **Bodhi:** Open-source agentic AI platform to support end-to-end workflows starting from development to production • **CoreAI:** Agentic solution supporting marketing and customer operations through integrated identity and marketing data • **Sustain.AI:** Operational layer to optimize service delivery through automation and self-healing capabilities

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TCS: Platform-neutral agentic ecosystem with accelerated build for fast-evolving tooling and rapid integration

Strengths	Development opportunities
• **Value proposition:** TCS delivers a platform-neutral agentic AI ecosystem through WisdomNext™, pre-built value-chain agent solutions, and AI-driven tech modernization to rapidly transform enterprise workflows, accelerate modernization, and scale autonomous business outcomes across industries. • **Platform-neutral, multi-model agentic architecture:** TCS delivers a flexible agentic ecosystem through WisdomNext™ that supports various models, vector DB, and frameworks while enabling dockerized, interoperable agents. It has invested in building ecosystem partnerships (NVIDIA, OpenAI, Google, AWS), AI-focused data centers (TCS HyperVault), strategic acquisitions (Coastal Cloud and ListEngage) to enhance Salesforce, data and AI capabilities, AI CoEs and labs, and 150+ specialized solutions tailored to sectors such as financial services, accounting, and supply chain management. • **Deep enterprise and ecosystem advantage for real-world deployment:** With access to Tata Group's cross-industry knowledge and strong integration expertise, TCS orchestrates agentic AI across infrastructure, data, models, and enterprise systems. Its 100+ agentic AI-powered modernization patterns, ERP integrations, and legacy-to-cloud transformations ensure reliable, production-scale outcomes. • **Evidence of shift toward Services-as-Software:** TCS Cognix™ replaces people-led BPM with human-governed, agentic AI-driven operations, shifting delivery from FTE-based services to outcome-led, software-run execution. • **Outcomes:** TCS helped a mortgage provider automate borrower/property classification with AI, reducing the processing time from 20 minutes to 2.3 minutes. It deployed an end-to-end agentic claims assistant for a global insurance firm, achieving faster disability claims processing and 40% faster claims resolution. • **Customer kudos:** Customers are impressed by its focus on human augmentation and the platforms it has developed and applied to deliver this. • **Partner kudos:** Partners praise its deep industry context, strong understanding of client operations, end-to-end portfolio of solutions, and globally scalable hybrid delivery.	• **Sharper industry value storytelling:** TCS should enhance its GTM with clear, outcome-led industry narratives that explain measurable business impact and how each agentic solution works in practice. • **More flexible, outcome-aligned commercial models:** The company should adopt more clearer outcome-based pricing to replace traditional FTE models, accelerating the adoption of agentic AI and aligning with enterprise expectations for AI-driven value. • **Customer critiques:** Clients want TCS to make more of its "customer zero" story and scale out and productize the lessons learned. • **Partner critiques:** Some partners indicated scope for faster growth via M&As, clearer agentic monetization, and sharper showcasing of marquee AI wins to lift share of voice.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
NVIDIA, AWS, Microsoft, Google Cloud, ClearML, Meta, OpenAI, Mistral AI, Vianai, Kore.ai, Windsurf, Yellow.ai, Fiddler.ai	**2025: ListEngage** (Salesforce platform optimization, digital marketing transformation, omnichannel campaign and data strategy, and AI advisory); **Coastal Cloud** (Salesforce consulting, implementation, AI integration, data architecture, and managed services)	**Number of clients:** Not disclosed **Key clients:** • Large multinational automotive manufacturing corporation • Large multinational bio-pharmaceutical company • Major North American bank • Middle East-based low-cost airline • Leading Indian retail chain • Large aircraft engine manufacturer	**Agentic services headcount:** ~125,000 AI experts **Delivery and innovation locations by major geo:** 198 service delivery centers in 55 countries; 9 TCS Pace Port™ Labs in New York, Pittsburgh, Toronto, Amsterdam, London, Tokyo, Sao Paulo, Paris, Singapore; 5 TCS Pace™ Studios in Letterkenny, Riyadh, Manila, Stockholm, Sydney; 7 research labs in India and many more globally, specific to industries, customers, adjacent tech	**TCS AI WisdomNext™:** Orchestrated GenAI platform powering multi-agentic intelligence with enterprise-grade security and guardrails **TCS MasterCraft for connected intelligence:** Agentic AI to operationalize purposive agentic use cases for business at scale **TCS TwinX™:** Enterprise digital twin platform for risk-free business experimentation **NeuralDecision Synthesis:** Unlocking insights and decisions with actionable insights **TCS Cognix™:** Agentic AI-infused autonomous operating model that enables an end-to-end, business-centric, and personalized approach to enterprise operations transformation

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Wipro: Consulting-led provider moving agentic AI into enterprise operations

Strengths	Development opportunities
• **Value proposition:** Wipro enables smarter decisions and faster time to value from agentic AI by combining domain-aligned data products, embedded intelligence, and scalable platforms to deploy and optimize trusted agentic systems. • **Scaling agentic platforms globally:** Wipro has 300+ agentic clients, 2,000+ AI engagements, 250+ deployable agents (e.g., HR/EX, finance and legal, and sales and marketing agents), 36,000+ FTEs upskilled through its "School of Agentic AI", 77+ delivery centers, and 25+ co-innovation labs. These are underpinned by WEGA for build and transform and WINGS to run and operate. • **Consulting-led, industry-aligned agentic services:** Wipro's approach is anchored in its data and AI engineering heritage and with A-IQ embedding AI-led diagnostics to standardize and accelerate readiness assessment, opportunity sizing, and risk analysis. The company combines industry solutions across the BFSI, healthcare and life sciences, retail and CPG, manufacturing, and telecom industries with ecosystem depth spanning hyperscalers, NVIDIA, and Wipro Ventures, operationalized through through WEGA and WINGS to support trusted, enterprise-scale deployments. • **Evidence of shift toward Services-as-Software:** Wipro deployed ACA.AI (Affordable Care Act) for a US healthcare insurer across contact centers, autonomously managing approximately 50% of member interactions, improving operational efficiency by 40%, and reducing operating costs by 30%. • **Outcomes:** A US financial services firm improved its credit risk assessment accuracy by 20%–30% and reduced operational costs by 30%–40% through agentic decision support. A global manufacturer generated proposals 10x faster with a 20% win-rate increase through agentic commercial workflows. • **Customer kudos:** Clients appreciate Wipro's collaborative approach, depth in emerging technologies, global delivery reach, and flexible, knowledgeable teams that adapt well to enterprise needs. • **Partner kudos:** Partners highlight its strong technology vision, investments in agentic platforms, delivery excellence, and focus on business outcomes.	• **Strengthen publicly published agentic proof points:** Wipro's agentic AI services messaging emphasizes definitions, capabilities, and examples rather than quantified outcome metrics, which may limit buyer verification at the shortlist stage. • **Human + AI operating model clarity:** Wipro could further codify reusable Human+AI operating models that define decision rights, role redesign, and escalation paths, helping enterprises standardize agentic adoption across functions. • **Customer critiques:** Clients noted opportunities to improve consistency in communication and further refine pricing and commercial models for agentic engagements. • **Partner critiques:** Partners suggest improving marketing solutions, pipeline development, and consulting depth, along with more consistent promotion of joint wins.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Google Cloud, Microsoft, AWS, NVIDIA, Salesforce, SAP, ServiceNow, Databricks, Intel, IBM, HPE, Dell, Dataiku, Snowflake **Venture investments:** Ema, Arcee.AI, Pay-i, Avaamo	**2025: HARMAN's Digital Transformation Solutions** **2024: Aggne** (US-based insurtech and consulting firm focused on the property and casualty [P&C] insurance market) **2022: Convergence Acceleration** (US-based consulting and program management firm for telco); **Rizing** (global SAP consulting firm)	**Number of clients:** 300+ **Key clients:** • 7 out of top 10 US banking/finance firms • 4 out of 5 MAANG (Meta, Amazon, Apple, Netflix, and Google) companies • 5 out of top 10 health and life sciences firms • 3 out of 5 top global energy firms • 3 out of top 10 global auto firms • 4 out of top 10 retail brands • 4 out of top 5 US payors • 2 out of top 5 medical device firms	**Headcount:** 36,000 **Delivery and innovation locations by major geo:** 77+ global delivery centers across Americas (US, Canada, Brazil, Mexico), Europe (UK, Germany, France), Middle East (Saudi Arabia, UAE), APAC (India, China, Australia, Japan) 25 co-innovation labs, Github CoPilot CoE, GenAI CoE at IIT Delhi, Cloud Labs (e.g., AWS AI launch pads across 4 Wipro centers, Google Gemini Experience Zone)	• **WEGA:** Agent-native delivery platform to build AI solutions at scale • **WINGS:** Agent-native delivery platform for Operations • **Wipro AI Platform:** Unified platform for building, deploying, and operating agentic solutions • **A-IQ (Agentic Intelligence Quotient):** AI-enabled framework to assess enterprise agentic readiness and prioritize where agentic systems can be applied • Solution-layer IP built on these platforms: Sovereign AI, Inspect AI including Wealth AI, PayerAI, Energy UpstreamAI, Telco Enterprise AI, Industrial-AssetsAI, Telco Autonomous Networks.

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Akkodis: Agentic services grounded in data platforms and governed execution

Strengths	Development opportunities
• **Value proposition:** Akkodis delivers agentic services aimed at improving employee engagement, productivity, and business performance by embedding governed AI agents into enterprise workflows, enabling measurable business and P&L impact. Its engineering domain expertise is scaled using industrialized agents provided through the agent platform. • **Platform scale with adoption engine:** Akkodis' agentic services are anchored in AI-Core (industrial AI and agent orchestration platform), DataKKoD (data context and integration fabric), and M365 Copilot Factory (agent build and adoption engine), delivering eight use cases scaled to production (e.g., education, manufacturing, and legacy modernization). These are supported by 29 global AI labs, the Barhead Solutions acquisition, AI Academy programs (training 50,000+ client professionals), and internal whole-of-staff to drive cultural adoption backed by change management. • **Data-led agentic architecture:** Akkodis embeds opportunity and risk identification across technical, operational, ethical, regulatory, and business dimensions, operationalized through DataKKoD's four-phase pipeline (collect, enrich, expose, store) with partially automated pre-deployment governance gates, run-time approval workflows, audit trails, and ROI-led use-case prioritization to prevent value leakage. An in-house agentic orchestration layer underpins this approach by providing enterprise-grade stability, observability, and traceability beyond open-source tooling. • **Evidence of shift toward Services-as-Software:** AI-Core's ready-to-use agentic plugins (e.g., TestGuru, DocuLens, Translate) are executed autonomously across programs, cutting execution times from minutes to seconds and enabling higher test throughput and faster release cycles without scaling delivery effort. • **Outcomes:** An Australian public education department reduced the time spent on creating lesson plans by 50%–60% using specialized agents to automate the process. A global manufacturer reduced take-back orders by 20%–30%, cut down scrap by 30%–40%, and achieved >90% forecasting accuracy through agentic manufacturing intelligence. • **Customer and partner kudos:** No response to our invitation to provide feedback.	• **Expand proof of revenue and growth impact:** While Akkodis demonstrates strong productivity and efficiency outcomes, publishing more agentic use cases tied directly to revenue growth, margin expansion, or demand generation can strengthen executive-level ROI credibility beyond cost take-out. • **Formalize human-AI collaboration frameworks:** Akkodis articulates thoughtful human-in-the-loop and autonomy principles. Codifying these into a clear, staged framework for human-AI collaboration and autonomy progression can help enterprises operationalize agentic adoption over time. • **Customer and partner critiques:** No response to our invitation to provide feedback.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Salesforce, Microsoft, AWS, Google Cloud, Databricks, Hugging Face	**2025: Barhead Solutions** (specialized consulting firm focused on business solutions, leveraging AI and the Microsoft tech stack)	**Number of clients:** 12 **Key clients:** • 3 public sector clients • 4 automotive clients • 3 logistics clients • 1 financial client • 1 life sciences client	**Headcount:** ~60 **Delivery and innovation locations by major geo:** Global delivery centers across Australia, Philippines, Germany, Bulgaria, France, India, Czechia, US, Japan; 29 AI labs, scaling to 36 in the next 18–24 months	• **AI-Core:** Productized industrial AI and agentic execution platform with a ready-to-use plug-in catalog supporting repeatable, production-grade agentic workloads • **DataKKoD:** Productized open data ecosystem and lakehouse platform with a cyclic four-phase pipeline (collect, enrich, expose, store), enabling governed, execution-time data access for humans and agents across the data landscape and fabric

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Atos: Full lifecycle agentic services grounded in sovereign, secure enterprise delivery

Strengths	Development opportunities
• **Value proposition:** Atos helps enterprises adopt, scale, and integrate agentic AI responsibly by combining consulting-led prioritization, secure and sovereign-ready delivery, and platform-enabled execution across IT productivity, enterprise knowledge, and industry business processes. • **Platform-led agentic expansion:** Agentic services are anchored in the Atos Polaris AI Platform (agent build, orchestration, and governance layer) and the Atos AI Factory model (consulting framework for prioritizing, deploying, and scaling agents). It supports 20 enterprise clients through 2,000+ AI specialists and has made focused investments in sovereign AI infrastructure, AgentOps governance, and industry-specific agent frameworks. • **Governed agentic delivery at scale:** Atos delivers agentic AI through its full lifecycle agentic expertise, cybersecurity-led sovereign AI delivery, and 20+ years of data modernization and governance, operationalized via an 800+ use case navigator embedded with legal risk ranking and domain-specific agents such as Patient 360 for healthcare and post-sales service assistants for manufacturing. • **Evidence of shift toward Services-as-Software:** Reusable Atos Polaris AI agents automated 58% of quotations and cut the processing time from five hours to three minutes in production environments. • **Outcomes:** A global insurer achieved 30%–40% productivity gains across knowledge and analysis agents. An aviation parts provider delivered $1 million+ in savings and $25 million in inventory optimization through agentic quoting workflows. • **Customer kudos:** Customers commend its strong AI competence, proactive technology guidance, skilled talent, and reliable project delivery. • **Partner kudos:** Partners appreciate its strong cybersecurity and compliance, advanced agentic engineering, broad enterprise reach, and deep modernization expertise.	• **Strengthen enterprise transformation framing:** Atos should better articulate how its AI Factory–led agentic deployments scale from functional productivity gains into enterprise-wide operating model change and sustained business impact. • **Accelerate agent reuse at scale:** The company should improve its delivery consistency, reduce costs, and shorten the time to deploy agent-based solutions through greater standardization and reuse of agents across the Polaris marketplace. • **Customer critiques:** Customers expect more ongoing guidance, deeper industry insight exchange, and continuous updates on emerging AI developments. • **Partner critiques:** Partners expect the company to strengthen its vertical agentic assets, expand its certified talent, and deepen coordinated joint planning across regions and accounts.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, Databricks, Snowflake	**2022: Cloudreach** (cloud engineering and MLOps capabilities)	**Number of clients:** 20 agentic services clients **Key clients:** • TruStage • Stellantis Financial Services • Flender • BBAC • Satair • Estée Lauder	**Headcount:** 2,000+ dedicated AI experts **Delivery and innovation locations by major geo:** Delivery centers across US, UK&I, Germany, France, Brazil, Spain, Poland, India; Innovation Centers and CoEs in US, UK&I, Germany, France, Brazil, Spain, India	• **Atos Polaris AI Platform:** Enterprise platform for building, orchestrating, governing, and operating agentic AI with AgentOps, security guardrails, cross-cloud interoperability, and agent reuse • **Atos AI Factory:** Consulting-led framework for prioritizing, deploying, governing, and scaling agentic AI across the full lifecycle using responsible AI, DataOps, and AgentOps • **Autonomous Data & AI Engineer:** Agentic solution designed to handle and automate complex, multistep data and AI engineering tasks for business processes across industries

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BCG: Transformation consulting and integration strategy for agentic AI-led outcomes

Strengths	Development opportunities
• **Value proposition:** BCG positions itself as a strategic AI transformation partner that combines deep business strategy with advanced AI execution capabilities. It focuses on end-to-end transformation, from opportunity identification to scaling, blending predictive, generative, and agentic AI into business decision models. It aims to close the AI impact gap by scaling enterprise AI and redesigning workflows for autonomous execution. • **Investments in shifting toward agentic, software-enabled delivery:** BCG is investing in agentic AI through partnerships with key agentic AI players such as hyperscalers (AWS, Azure, Google Cloud), LLM partners (OpenAI, Anthropic), and enterprise SaaS platforms (Salesforce, SAP) to accelerate deployment. It is scaling BCG X, its engineering and build arm that includes AI Factory teams, product engineering groups, and data and AI specialists. The company has also rolled out firm-wide AI training and developed reusable agent frameworks to speed up deployment. Through BCG Digital Ventures, it co-builds and incubates AI-driven platforms with clients. • **Agentic AI capabilities rooted in enterprise transformation:** BCG's agentic AI capabilities center on AgenticKit and practical playbooks for designing, governing, and scaling AI agents. Delivered through BCG X (integrating Gamma analytics, Platinion architecture, and Digital Ventures' build expertise) and guided by the DRI (Deploy–Reshape–Invent) framework, BCG's value lies in transformation consulting, integration strategy, and turning AI ambition into measurable business outcomes. • **Evidence of shift toward Services-as-Software:** BCG implemented an agentic AI planning platform for a global industrial goods manufacturer that embeds consultant-led scenario planning and optimization into an always-on agentic AI system, continuously delivering business outcomes without proportional human effort. • **Outcomes:** BCG helped a global industrial manufacturer deploy AI-driven digital twins and agents, improving supply chain decisions and lifting EBITDA by ~2 points. A global consumer products leader embedded AI agents enterprise-wide, cutting SG&A costs by 200bps, boosting efficiency by 40%, and tripling innovation speed. • **Customer kudos:** PHOENIX Group, Europe's leading pharmaceutical wholesaler, credits BCG's AI Service Agent for freeing its staff for complex tasks. • **Partner kudos:** Not available	• **Showcase more named, in-production agentic deployments with quantified outcomes and client voices:** BCG would benefit from surfacing more named, referenceable, in-production agentic deployments with quantified ROI and client voices to strengthen buying confidence. • **Opportunity to move beyond tool deployment toward an AI-first delivery model:** BCG is actively rethinking delivery and has made meaningful progress. However, there is scope to further push for a fully AI-first consulting operating model with clearer agent-human role definitions and agent-owned workflows. • **Lacks a clearly branded, standalone agentic AI product suite:** Despite its strong IP and accelerators, BCG lacks a clearly branded, productized agentic AI stack, relying instead on co-built solutions and services-led delivery. • **Balance transformation narratives with execution realities:** The agentic AI thought leadership would benefit from a more consistently grounded ambition in execution realities, especially around end-to-end workflow redesign and organizational readiness.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, OpenAI, Anthropic, Salesforce, SAP, IBM, LangChain, Articul8, Palantir, Intel, DataRobot	**2022: Formation** (AI-led dynamic offer optimization and personalization solutions); **Wingg** (specialist in data analytics using AI/ML)	**Number of clients:** Not disclosed **Key clients:** • Leading global beauty and cosmetics company • Global industrial goods company • Large international telecommunications provider • Leading global consumer products company • Global beverage manufacturer	**Headcount:** 3,000+ professionals in the BCG X business unit **Delivery and innovation locations by major geo:** Presence in 80 cities across Americas, Europe, MEA, APAC; BCG X AI Science Institute in Boston	• **AgentKit (BCG X):** Agent-app framework for constrained agent deployments with reliability controls and production scaffolding • **Agentic AI scaling playbooks:** Detailed implementation playbooks for enterprise teams

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Brillio: Enterprise agentic services built on data and application management

Strengths	Development opportunities
• **Value proposition:** Brillio enables enterprises to transform application and data ecosystems through ADAM (suite of foundation and business solutions powering agentic services), using multi-agent engineering, observability, and quality automation to shorten delivery cycles, improve reliability, and expand AI use cases across business functions. • **ADAM as the engine for Brillio's agentic services:** Brillio is scaling agentic services by using ADAM as the backbone for strategy (ADAM Strategy Toolkit), observability and governance (ADAM AI Control Tower), and reusable agent solutions, supported by 12+ global delivery centers and deep partnerships (e.g., Salesforce, Microsoft, and Snowflake) to anchor large-scale telecom, QSR, and high-tech transformations, proven as Brillio's fastest-growing agentic domains alongside healthcare and BFSI. • **Agentic model bridging data, talent, and orchestration:** Brillio tackles platform fragmentation, agent sprawl, and domain gaps through a domain-anchored, IP-led agentic model, supported by ADAM's cross-platform, domain-specific agents, and reference architectures. Its AI-native talent model (reimagining talent models and introducing next-gen roles), scalable frameworks (crawl-walk-run model), curated AI ecosystem, and flexible commercial models enable enterprise execution across churn defense, ITSM modernization, and data-quality transformation. • **Evidence of shift toward Services-as-Software:** Brillio uses ADAM to automate its own HR, marketing, supply chain, and operations workflows as part of its client-zero approach, while building reusable patterns for repeatable agentic execution with clients. • **Outcomes:** A global telecom provider deployed ADAM-led agentic workflows across customer and network operations, reducing churn by ~8bps, lowering retention costs by ~15%, and improving offer acceptance by ~20%, influencing ~$1 billion in revenue. An ecommerce firm implemented AgentForce with Brillio, achieving 80% response accuracy and reducing workload by 20%. • **Customer kudos:** A client commends its strong tool selection expertise, highly capable delivery team, and transparent cost-aware delivery. • **Partner kudos:** Not available	• **Platform commercialization maturity:** ADAM operates as an accelerator rather than a complete productized platform. The lack of a defined packaging or adoption model limits how enterprises can procure or scale agentic platform capabilities independently. • **Enhance agentic partner ecosystem:** Brillio relies on hyperscaler and system-of-record partners but lacks dedicated agentic-technology alliances. Building such partnerships could enhance its differentiation and strengthen agentic enterprise adoption. • **Customer critiques:** Not available • **Partner critiques:** Not available

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Google Cloud, OpenAI, Salesforce, ServiceNow, Adobe, Databricks, Snowflake	None	**Number of clients:** 20–25 clients **Key clients:** • Large global telecom provider • Major ANZ-based retail group • Large global software provider	**Headcount:** 100–120 employees within agentic services **Delivery and innovation locations by major geo:** 12+ global delivery centers in India (Bangalore, Pune, Hyderabad, Chennai), US (Dallas, Edison, San Rome), Mexico (Guadalajara), UK (London), Romania (Bucharest, Oradea, Cluj)	• **ADAM (Agentic Data and Application Management):** Composable accelerator platform that helps enterprises using agentic foundational solutions, business solutions, strategy toolkit, agent marketplace, and the AI control tower • **ADAM Strategy Toolkit:** Consulting suite with prebuilt assessments that guide the journey from AI maturity analysis to a clear implementation roadmap and quantified business value • **ADAM AI Control Tower:** Single, unified agentic observability layer across data, models, prompts, code, agents, and cost with built-in cause-and-effect analysis across all dimensions

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EXL: Domain-rich, governance-first agentic AI partner for regulated, data-intensive enterprises

Strengths	Development opportunities
• **Value proposition:** EXL delivers domain-rich, governance-first agentic AI that drives measurable operational and financial outcomes for regulated, data-intensive enterprises. • **Regulated-industry agentic AI, powered by EXL IP:** EXL accelerates agentic AI growth through 25+ granted patents in AI/ML and workflow automation, including Insurance LLM and Transaction Insights, delivering measurable accuracy, efficiency, and risk-reduction gains. With seven fine-tuned domain LLMs, 100+ production agents, and deep insurance, healthcare, and BFSI expertise, it scales compliant and outcome-driven agentic AI solutions in regulated industries. • **Compliance-led, scalable agentic AI delivery:** EXL stands out for its deep co-creation model with clients and hyperscalers such as AWS (Insurance LLM, EXLerate.AI integrations) and Azure (Healthcare Payer LLM) to build jointly engineered agentic solutions. Its Guardian Agent-powered governance, data-first architecture, and operational integration enable safe, rapid, and scalable enterprise adoption of agentic AI across complex workflows. • **Evidence of shift toward Services-as-Software:** EXL converts service-heavy processes, such as document extraction and claims review, into software-driven components by leveraging XTRAKTO.AI and domain LLMs for reusability across client solutions. • **Outcomes:** The company built an agentic voice-intent containment stack for a global bank, helping it achieve >90% intent accuracy, automate 15 million calls, and save ~$60 million. For a Fortune 100 pharma, its multi-agent RAG audit reporting helped auto-draft reports and summaries, boosted auditor efficiency by >40%, and halved the lead time. • **Customer kudos:** Clients praise its deep insurance expertise, strong data foundation, and highly collaborative and flexible team. • **Partner kudos:** Partners are impressed by its embedded solutions, visionary leadership committed to growth, and global delivery scale.	• **Advancing from tasks to full workflows:** While EXL excels at high-value task automation, it should demonstrate full multi-step workflow orchestration to reinforce its end-to-end automation capabilities. • **Strengthening the agentic ecosystem:** EXL should expand agentic-native startup partnerships to boost innovation, complement existing IP, and deepen specialized tooling beyond hyperscaler collaborations. • **Customer critiques:** Clients noted siloed engagements across revenue centers and expect the company to be more proactive in offering and deploying agentic AI solutions. • **Partner critiques:** A partner wants EXL to verticalize its sales alignment and invest more in partner development.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, NVIDIA, Databricks, ServiceNow, Salesforce, Appian, Genesys, Snowflake, UiPath, SS&C Blue Prism, Automation Anywhere	**2024: ITI Data** (data management and governance capabilities)	**Number of clients:** 50+ **Key clients:** • Leading Australia-based insurance and banking group • Leading UK-based global insurance marketplace • Leading US-based healthcare and medtech manufacturer • Leading UK-based utility provider • US-based leading healthcare payer • Global logistics operator • Multi-national FMCG manufacturer	**Headcount:** 1,500 FTEs globally, including AI engineers, LLM developers, prompt engineers, solution architects, and responsible AI practitioners **Delivery and innovation locations by major geo:** 19 global delivery centers supporting agentic AI and GenAI services in India (Bengaluru, Gurugram, Hyderabad, Noida, Pune, Chennai), UK (London), USA (New York City, New Jersey), Australia (Sydney), Philippines (Manila), Ireland (Dublin), South Africa (George, Cape Town); 12+ AI Innovation Labs and 5 joint labs with clients, hyperscalers, and academic partners in India, US, UK, Ireland, Australia	**EXLerate.AI™:** Platform for orchestrating agentic AI workflows **EXLdata.ai™:** Agentic semantic layer for AI-ready data **AgentiX:** Agentic design methodology for workflows **Code Harbor™:** Multi-agent code and data transformation **Smart Agent Assist:** Contact center agent copilot **EXELIA.AI™:** Conversational copilot for agentic workflows **XTRAKTO.AI™:** Patented IDP solution leveraged by agentic extractors **Transaction Insights™:** Transaction analytics for customer profiling **EXL fine-tuned LLMs:** Insurance LLM, healthcare payer LLM, healthcare provider LLM, banking and financial services LLM

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Firstsource: Deep domain focus, proprietary agentic tooling, and scalable human-AI orchestration

Strengths	Development opportunities
• **Value proposition:** Firstsource is transforming high-cognition operations through domain-driven, AI-powered, outcome-led automation at the intersection of data, and AI. • **Domain-deep, high cognition process expertise:** Firstsource has made significant investments in regulated industries (healthcare, BFSI, utilities, and telco), the acquisition of QBSS, and developing 15+ industry workflows with real-world outcomes. It uses its own agentic AI solution internally across marketing, legal, and HR, showcasing its ongoing evolution from traditional BPM player to AI-first transformation partner. • **Modular, scalable, and governed AI delivery:** Agentic AI Studio, built on LangChain, enables 50+ reusable task agents with modular workflows and embedded governance. Additionally, its curated gig-sourcing platform of 200,000+ workers provides a scalable HITL layer for exception handling and micro-tasks, offering agility and cost efficiency beyond traditional FTE models. • **Strategic consulting and startup investments:** Firstsource combines consulting-led offerings such as Agentic Readiness Assessments with strategic investments in startups such as Lyzr to co-develop agentic AI capabilities such as knowledge graphs and domain-led process reimagination, supporting enterprises to adopt AI in an outcome-driven way. • **Evidence of shift toward Services-as-Software:** In healthcare claims adjudication, SOP (standard operating procedures) Companion automates SOP execution, improving productivity by ~50% and shifting human roles to supervision. • **Outcomes:** For a leading UK financial institution, Firstsource implemented multi-agent AI for collaborating document processing, fund tracking, and customer outreach to accelerate fund transfer turnaround from days to hours and improve CX by 70%. For a global healthcare and insurance organization, it developed multi-agent workflows to auto-adjudicate claims with compliance controls, reducing manual errors by 80% and cutting costs by 30%. • **Client kudos:** Unable to share any client references for interview. • **Partner kudos:** Partners praise its ability to bring together deep regulated-industry expertise, digital-AI delivery stack, and a collaborative transformation approach to drive scalable, outcome-focused operations.	• **Accelerate time-to-value:** Firstsource must move beyond POCs by offering rapid deployment models and pre-built use case accelerators for clients ready to scale immediately. • **Prove differentiation with metrics:** It should showcase domain-specific model performance, especially accuracy and compliance benchmarks, as proof points of governance-focused outcomes. • **Client critiques:** Unable to share any client references. • **Partner critiques:** Some partners want Firstsource to boost its agentic AI impact by speeding up data and approval workflows. This would create more reusable solution assets and tighten outcome tracking, helping clients move from pilots to full production much faster.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Gemini, Llama, OpenAI, AAI (Opus), AutogenAI, Exponential AI, Guidehealth, Kore.AI, Krista, LangSmith, Lyzr, Pal (Personalized Adaptive Learning), Prodigal, Prosper, Upfront, Verint, Verloop.io, V7, Yellow.AI, Zenarate	• **2025: AccunAI** (Gig-based AI data labeling and evaluation) • **2024: Quintessence** (provides AI-enabled revenue cycle management solutions for health systems through GenAI-based medical coding prediction), **Ascensos** (customer service outsourcing and CX management)	**Number of clients:** 10 **Key clients:** • 2 of top 10 healthcare providers • 1 of UK's leading edtech players • 2 of leading US group of hospitals/providers	**Headcount:** 500+ AI engineers and 35+ dedicated agentic AI researchers **Delivery and innovation locations by major geo:** 41 delivery and innovation centers across US, UK, India, Philippines, Mexico, South Africa, Australia	• **Agentic AI Studio:** Modular platform (Xplore, Evaluate, Weave, Monitor) to design, orchestrate, and scale multi-agent workflows • **Agentic AI Store:** Prebuilt 20+ domain-specific workflows across healthcare, banking, telecom, utility, edtech and internal business functions • **Gigsourcing Platform:** AI-driven talent orchestration system connecting enterprises with on-demand skilled gig workers through compliance-first onboarding and HRIS/ERP integration • **Domain-specific agentic solutions:** SOP companion (helps frontline workers follow standard operating procedures [SOPs]), cognitive email studio (automates email response handling), and AI coach (real-time call center assistance and employee onboarding/training)

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Genpact: Scalable AI solutions grounded in operational discipline and domain expertise

Strengths	Development opportunities
• **Value proposition:** Genpact's agentic AI solutions automate and improve core business operations for large enterprises with horizontal and verticalized solutions such as the Accounts Payable (AP) suite and the Insurance Policy Suite. • **Integrated AI platform ecosystem for scalable delivery:** Genpact's proprietary platforms, Gsolution.ai, Agentic Development Lifecycle (ADLC), and AI Gigafactory, enable consistent development, deployment, and governance of AI agents. These assets support modular integration, lifecycle management, and rapid prototyping, reducing time-to-value and ensuring responsible AI implementation at enterprise scale. • **Deep organizational investment in IP, talent, and adoption:** Genpact has built strong AI delivery capabilities through 200+ agents, pre-built connectors, and structured training via Giga Academy. Its acquisition of XponentL Data, augments its data, AI, and life science and healthcare capabilities, and a dedicated 7,200+ workforce enables scaled deployment of domain-specific solutions across enterprise clients. • **Evidence of shift toward Services-as-Software:** Genpact AP Suite and Insurance Policy Suite are positioned as modular, software-style solutions that deliver 80–90% touchless processing. • **Outcomes:** A leading Australian bank deployed agentic AP capture to reduce OCR errors and manual exception handling. This delivered 40% cost optimization, reduced leakage by 30%, and lowered manual AP workload by up to 99%. A global food-service distributor deployed AI-based invoice capture and prioritization, with PO matching dropping to 30 seconds and manual effort by 90%. • **Customer kudos:** Clients commend its customer understanding, investment in new solutions, cross-client experience, flexibility, operational execution, and domain expertise. • **Partner kudos:** Partners are impressed by its deep process intelligence, data, AI, and industry expertise, and collaborative partnership model.	• **Showcase higher-level agentic AI in practice:** Genpact should continue to add examples of Level 4 (multi-agent coordination) and Level 5 (fully autonomous decision-making) agents to further demonstrate advanced agentic capabilities. • **Strengthen AI ecosystem integration for innovation at scale:** The company should leverage and integrate partner capabilities more deeply to co-develop innovative agentic AI solutions, minimizing duplication of effort and enabling faster solution delivery. • **Customer critiques:** Clients expect Genpact to deliver more innovative business case solutions and improve its speed in bringing tech-driven solutions. • **Partner critiques:** Partners want to see it boost its joint marketing, retain top talent, sharpen the tech narrative and model guidance, enable creative deals, and strengthen cross-regional coordination.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Google Cloud, NVIDA Databricks, Snowflake ServiceNow, Salesforce, Dataiku, Xelix	**2025: XponentL Data** (data and AI solutions provider functioning as a technology services firm that delivers strategy, design, and engineering for complex data transformations with strong specialization in the life sciences and healthcare sectors)	**Number of clients:** 123+ **Key clients:** • Wesco • GE Vernova • Global leader in food service distribution • Global aluminum manufacturer • B2B distribution and services company	**Agentic services headcount:** 7,200+ FTEs **Delivery and innovation locations by major geo:** • **AI Technology COE:** Bangalore, Hyderabad, Gurgaon, Manila, Bucharest, New York, Wilkes-Barre, Pristina • **Tech Innovation COE:** Palo Alto, Boston, Melbourne, Bangalore, Haifa/Netanya, Manila, London	• **Gsolution.ai (AI Maestro):** Central platform offering reusable AI agents, data models, connectors, and synthetic data assets and ADLC (agentic development lifecycle), which is a governance framework for designing, testing, deploying, and improving AI agents • **AI Gigafactory:** Scalable delivery model that combines delivery pods, AI Value Studios, and engineering teams to rapidly prototype, build, and scale agentic solutions with repeatable processes • **AP (Accounts Payable) Suite and Insurance Policy Suite:** Proprietary modular, agentic AI-powered products with domain-specific logic, reusable agents, and automation workflows

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Hitachi Digital Services: Combining deep industrial expertise with governed operational agents across IT and OT

Strengths	Development opportunities
• **Value proposition:** Hitachi Digital Services enables enterprises to turn fragile AI pilots into reliable, governed agentic operations by combining industrial AI depth with the ability to automate complex workflows across IT and OT environments. • **Evolving agentic capabilities:** Hitachi Digital Services empowers agentic services through its HARC Agents, supported by a library of 200+ agents spanning physical AI, document processing, sustainability reporting, diagnostics, and inspection. This is reinforced by R2O2.ai and Agent Management System (AMS), which govern build-and-run operations across an ecosystem of partners and Hitachi Ventures investments advancing industrial AI and automation intelligence. • **Unified industrial agentic architecture:** Through deep industrial and physical AI heritage (e.g., HMAX use cases across mobility, energy, and manufacturing), Hitachi Digital Services combines a unified agentic architecture anchored in a Minimum Viable Agent blueprint, HARC DRE (Data Reliability Engineering), and AMS to enable API-integrated agents that execute governed, domain-specific workflows across IT and OT environments. • **Evidence of shift toward Services-as-Software:** HARC Agents operate as persistent AI employees within client operations to deliver standardized, continuously executed workflows through AMS certification and monitoring. • **Outcomes:** A global manufacturer increased automated invoice processing from 65% to 90%, reduced correction effort by 96% and lowered cloud costs ~23% using coordinated multi-agent workflows across OCR, vision, LLM extraction and exception handling • **Customer kudos:** Clients praise its domain knowledge, flexibility, strong AI and data-science talent, and advanced cloud integration skills across complex workloads. • **Partner kudos:** Partners commend its proactive adoption of agentic AI, strong industry and engineering expertise, with a focus on high-quality, efficient agents supported by HARC with well-chosen use cases.	• **Expand measurable agentic outcomes across non-OT domains:** Hitachi Digital Services references activity in banking, healthcare, and IT operations, but demonstrated outcomes remain in OT. Sharing results in these areas can strengthen credibility and buyer confidence. • **Enhance agentic advisory capabilities:** Hitachi Digital Services demonstrates strong build-and-run expertise but limited advisory depth. Strengthening consulting support would help clients define enterprise-wide agentic roadmaps and scaling approaches. • **Customer critiques:** Clients seek more transparent co-design and technical collaboration. They noted higher perceived integration costs and want the company to challenge them more and bring new ideas. • **Partner critiques:** Partners want Hitachi Digital Services to expand agentic work across more verticals, accelerate iteration with more holistic designs, and improve technical marketing and seller enablement for its agent portfolio.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, NVIDIA, Trustwire, Archetype AI, Xaba, StrikeReady, Ema, Lineaje, Luminai, Lyzr	**2025: Synvert** (German data and AI services firm) **2022: GlobalLogic** (digital engineering services company)	**Number of clients:** Not disclosed **Key clients:** • Penske • DS Smith • Leading global manufacturer • Global industrial equipment provider	**Headcount:** Not disclosed **Delivery and innovation locations by major geo:** 20+ global delivery centers in US, Canada, India, Japan, Portugal, Singapore, Spain, Thailand, United Kingdom, Vietnam	**HARC Agents comprise four core AI resources:** • **HARC for AI:** Hitachi Application Reliability Center that provides managed operational reliability services • **R2O2.ai:** Framework supporting reliable, responsible, observable, optimal development of enterprise AI workloads • **Agent Library:** Includes reusable, composable agents that perform distinct tasks and can be orchestrated into multi-agent workflows • **Agent Management System (AMS):** Centralized enterprise governance, monitoring, and compliance through a unified dashboard for managing agentic platforms

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iOPEX: Delivering scalable agentic workflow automation with focus on data management and outcome alignment

Strengths	Development opportunities
• **Value proposition:** iOPEX empowers enterprises to overcome inefficiencies from manual operations, fragmented systems, and AI adoption challenges through a phased framework to deliver Agentic AI solutions. It combines intelligent workflow transformation, agent development, and continuous optimization to drive efficiency, system unification, and compliant innovation. • **Comprehensive agentic platform with functional specialization:** iOPEX offers an integrated platform (ElevAIte) supporting low-code agent creation, orchestration, data management, vendor agnostic integration, and policy-based governance. It has over 450 agents in production, and specializes in functional areas: service management, tech support operations, talent assessments (HR), contract management, sales ops, finance ops, media planning, and campaign activation & optimization. • **Strong domain expertise, governance and business outcome alignment:** iOPEX differentiates itself with its strong domain expertise (particularly in TMT, healthcare, and retail) and focus on data management capabilities across systems of records and system of experience. It embeds governance, privacy, and explainability directly into its agent operations through its AgentOps framework. This capability includes real-time trust scoring, human-in-loop controls, and audit trails, and ensures alignment with business outcomes. • **Evidence of shift toward Services-as-Software:** iOPEX implemented an agentic CX orchestration layer for a global telecom provider, autonomously handling 65% of customer calls and queries through software-driven intent, resolution, routing, and assurance. • **Outcomes:** For UK facilities firm, iOPEX used its agentic discovery platform to replace spreadsheet-based process of identifying automation opportunities, reducing IPA (Intelligent Process Automation) discovery from weeks to days. iOPEX deployed Agentic RAG assistants to unify decades of support knowledge for a payments provider, automating 50k daily events, speeding up resolutions, and significantly improving consistency. • **Customer kudos:** Clients praise its deep domain and process expertise, strong tooling, strategic partnership mindset, and win-win gain-share commercial approach. • **Partner kudos:** No response to interview requests.	• **Highlight new business value in case studies:** Current case studies demonstrate strong efficiency gains. Showcasing new revenue streams or business models will demonstrate broader strategic impact. • **Broaden the partner ecosystem:** Expanding partnerships with more hyperscalers, vertical-specific, and emerging AI platforms will improve integration flexibility and market adaptability. • **Build more frameworks, industry-specific agents, and templates:** Creating strong frameworks for responsible AI, reimagining workflows, roadmap for transformation, pre-built verticalized agents, and accelerators tailored to industries will reduce adoption barriers and increase speed to value. • **Customer critiques:** Some clients want clearer agentic AI roadmaps, stronger monitoring solutions, increased marketing, more focused early discussions, and deeper European market understanding. • **Partner critiques:** No response to interview requests.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Google Cloud, ServiceNow, Salesforce, UiPath, Databricks, Snowflake	**2025: Areya Technologies** (specialized in Salesforce and Agentforce implementations)	**Number of agentic services clients:** 12 **Key clients:** • Mitie • Ingenico • BT • Toshiba • Uber • Global contact center operator • Large US retail/payments provider	**Headcount:** 300 AI/ML engineers **Delivery and innovation locations by major geo:** Dallas, Chennai, Bangalore Dedicated AI labs (agentic services): 3 labs in operation (Chennai, Bangalore, Athens).	• **ElevAIte Platform:** Foundation for Intelligence-as-a-Service, unifying data, agentic workflows, orchestration layer, and AgentOps; consists of Agentic AI Studio (low-code agent design and multi-agent workflows), Runtime Platform (enterprise execution layer for cross-system orchestration), and Data Studio (intelligent data orchestration)

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LTM: Bridging agentic AI strategy and execution with patented frameworks, productized components

Strengths	Development opportunities
• **Value proposition:** LTM offers BlueVerse, a modular and productized AI ecosystem that helps enterprises operationalize AI agents at scale. It enables faster deployment, measurable business outcomes, and integrates responsible AI practices and governance frameworks directly into the agent lifecycle. • **Scaling agentic AI through IP, talent, and ecosystem co-innovation:** LTM has scaled its agentic AI strategy through proprietary platforms (BlueVerse Foundry, Agent Marketplace), 1,000+ agents, patented frameworks (ASPIRE2ADAPT), 10+ global AI labs, and 80,000+ trained professionals. Strategic partnerships with hyperscalers, academia, and startups fuel co-innovation, while embedded governance (RightAction, TRACER) ensures responsible scalability across industries • **Enterprise-ready AI: from strategy to scalable autonomy:** BlueVerse stands out for its dual-mode delivery that supports both AI-infused legacy technology transformation and AI-native process reinvention. It combines domain-optimized service pods, AI Foundry-based rapid prototyping, and last-mile integration with systems, enabling deployment across hybrid, multi-LLM environments. Its agent orchestration frameworks (MCP, A2A) further support distributed business workflows. • **Evidence of shift toward Services-as-Software:** BlueVerse was used to automate and standardize LLM evaluation and scoring for a global semiconductor client's contact-center chatbots, replacing subjective/manual testing and improving consistency and control across contact centers worldwide. • **Outcomes:** For an aerospace manufacturer, LTM deployed GenAI/agentic assistants for email-to-case, contracts, compliance, CRM insights, and RFQs, automating ~8,000 emails/day and cutting the RFQ effort by ~60%. It also implemented a multi-agent GenAI field-operations system on Bedrock/Snowflake for an oil and gas company, freeing the operator time by ~50%, reducing data prep by ~70%, and improving production by ~5%. • **Customer kudos:** Unable to share client references due to confidentiality and participation constraints. • **Partner kudos:** Partners appreciate its technological prowess, enterprise mindset, customer obsession, strong delivery, and modernization and solution engineering capabilities.	• **Demonstrate sustained value through long-term impact stories:** LTM could expand its case studies to include long-term ROI and transformation outcomes to strengthen executive-level confidence. • **Expand verticalized agent solutions with pre-built ROI models:** The company should offer more industry-specific agent kits (such as MediaCube) that are tailored to regulated sectors, bundled with predefined KPIs and ROI models to accelerate decision making. • **Customer critiques:** Unable to share client references due to confidentiality and participation constraints. • **Partner critiques:** Partners want LTM to scale its advisory depth and geographic diversification, build more referenceable case studies, strengthen internal career growth to retain talent, and tell a clearer differentiated story.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, IBM, Adobe, SAP, Oracle, UiPath, NVIDIA, Dell, Intel, Databricks, Snowflake, ThirdAI, Voicing.AI, E2E Cloud	None	**Number of clients:** 100+ (agentic AI and GenAI) **Key clients:** • Premier film distribution firm • World's largest manufacturer of elevators • International brewer • Multinational health technology company • Leading oil and gas company	**Headcount:** 15,000+ (AI and agentic AI) **Delivery and innovation locations by major geo:** 40–50 centers (includes AI and agentic AI) in India (Bangalore, Hyderabad, Pune, Chennai, Navi Mumbai), US (Warren (New Jersey), Redmond, Bellevue, Dallas, Atlanta, Hartford, Tampa), Canada (Mississauga), Saudi Arabia (Riyadh), UAE (Dubai), Australia (Melbourne), Singapore, France (Puteaux)	• **BlueVerse:** Cloud-agnostic agentic AI ecosystem with prebuilt agents, AI Foundry, and productized ops such as marketing ops • **AI Foundry:** No-code + pro-code studio to compose AI agents • **Agent Marketplace:** Store of plug-and-play with ~1,000 agents to buy, customize, and co-create across industries and functions • **TRACER:** Reliability, testing, and compliance framework for agents • **AAEE:** Continuous learning and evolution engine for agents • **Aspire2Adapt:** Outcome and value tracking framework for adoption-to-scale journeys • **RightAction:** Guardrail and governance framework enforcing safe, ethical agent decisions • **BlueVerse Agentic AI Radar:** Trend-maturity map to prioritize enterprise agentic AI investments

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McKinsey: Research-led, ecosystem-driven agentic AI delivery for governed enterprise transformation

Strengths	Development opportunities
• **Value proposition:** McKinsey, via QuantumBlack, pairs agentic strategy, build, and governed scaling to rewire portfolios and workflows to automate work, speed decisions, reduce cost, and grow revenue. • **Ecosystem-accelerated agentic modernization:** McKinsey's agentic AI momentum is anchored in QuantumBlack (AI engineering arm) and proves this through Agents at Scale, a multi-agent legacy-modernization platform delivering ~40% faster, lower-cost rewrites. QuantumBlack Labs incubates reusable agent assets, while alliances with NVIDIA and Google Cloud (Gemini) allow it to leverage partner technologies to help clients scale AI. Its focus on AI is reinforced by solid "Lilli" internal GenAI tool adoption to augment internal workflows. • **Research-backed, full-stack agentic delivery:** McKinsey couples boardroom-to-build execution portfolio and business-case shaping, QuantumBlack reference architectures, operating-model redesign, and autonomy risk playbooks with research (e.g., *Seizing the agentic AI advantage, One year of agentic AI*) grounded in 50+ agentic builds. • **Evidence of shift toward Services-as-Software:** McKinsey's Agents at Scale for IT modernization is a tiered multi-agent factory that uses agents to document legacy code, rewrite, review, and test, turning modernization delivery into a scalable software workflow rather than bespoke consulting hours. • **Outcomes:** McKinsey deployed agentic AI agent squads to automate legacy code documentation, recoding, review, and testing for a retail bank, reducing modernization time/effort by 50%+. It also implemented an agentic credit-memo workflow for a retail bank, automating multi-source data extraction and drafting, boosting productivity by 20%–60% and speeding credit decisions ~30%. • **Customer kudos:** Executives praise McKinsey's focus on workflow redesign and guardrails over "shiny" GenAI demos, calling the approach timely, insightful, and ethically disciplined. • **Partner kudos:** Not available	• **Place greater emphasis on end-to-end delivery model redesign:** Building on internal GenAI tools such as Lilli, McKinsey has an opportunity to reimagine consulting delivery by embedding AI agents into leaner, specialist team models, creating the conditions for faster execution and more consistent client impact over time. • **Publish ROI-backed agentic AI cases:** McKinsey should release more verifiable agentic AI case studies (named where possible) with KPIs and client quotes to sharpen differentiation, shorten sales cycles, and give clients benchmarking evidence of reducing adoption risk and accelerating scaling. • **Clearer QuantumBlack case attribution:** The company should provide deeper transparency on QuantumBlack's exact role, architectures, and outcomes in agentic engagements to sharpen its differentiation and give clients assurance on what's proprietary, reusable, and proven in production at scale. • **Customer and partner critiques:** Not available

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
NVIDIA, AWS, Google Cloud	**2023: Iguazio** (high-performance data science platform that focuses on getting models to production and maintaining them) **2022: Caserta** (data and analytics specialist)	**Number of clients:** 50+ agentic AI deployment across industries such as banking, market research, retail **Key clients:** • Large retail bank • Global market research firm • Top pharmaceutical company	**Headcount:** QuantumBlack has ~7,000 technologists, data scientists, engineers, designers, and project managers supporting AI delivery in 50+ countries **Delivery and innovation locations by major geo:** 133 offices worldwide; QuantumBlack hubs and AI Studios across North America, Europe, Asia	• **QuantumBlack Horizon:** Designed to build, orchestrate, and operate complex AI/GenAI applications, including multi-agent and digital worker patterns • **Agents at Scale:** GenAI+agentic AI platform for legacy modernization • **Lilli:** Internal GenAI platform for information retrieval and recommendations • **DealScan.AI:** Tool to evaluate potential investments in M&As

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Mindsprint: Multi-agent processes with operational control

Strengths	Development opportunities
• **Value proposition:** Mindsprint addresses manual effort, fragmented workflows and slow cycles by deploying production-ready agentic systems through a governed center of excellence, delivering repeatable multi-agent processes that improve accuracy, accelerate operations, and strengthen enterprise controls. • **Production-first agentic operations:** Mindsprint built a production-first agentic portfolio with five enterprise-scale deployments (SPRINT AP, ProcureSPRINT, GuardianEye, Account Maintenance Agents, Chatbot & Notification Agents), 20+ live agents across accounts payable, procurement, and service desk with an AI-certified workforce exceeding 95% to support expanding client demands. • **CoE-governed agentic delivery:** The Agentic AI CoE applies boardroom readiness assessments, risk quadrants, and 12-week fail-fast production cycles, reinforced by continuous internal client-zero validation (e.g., GuardianEye across 60+ countries) and a cost-competitive, open-source flexible stack (LangGraph, LangChain, Autogen, etc.) to deliver production-grade agentic systems with enterprise-level accuracy, auditability, and security. • **Evidence of shift toward Services-as-Software:** SPRINT AP's reusable multi-agent components helped a major agricultural company achieve ~95% AP accuracy, ~70% faster cycles, and ~50% lower cost by productizing invoice intake, validation, and posting. • **Outcomes:** A global energy-technology manufacturer shortened its sourcing cycles by 60%–80%, achieved 99% compliance, and realized 10%–20% cost savings using ProcureSPRINT. A major food, beverage, and pharma supplier cut its penetration-testing cost by ~50% and false positives by ~90% with Guardian Eye. • **Customer kudos:** Customers commend Mindsprint's responsive culture, strong project management, and deep technical expertise, making complex technologies easier to adopt and scale. • **Partner kudos:** Partners applaud its collaborative delivery, strong Asia presence, and deep domain expertise, supported by reliable, committed talent.	• **Deepen ecosystem integration:** Mindsprint can deepen its ecosystem maturity by expanding beyond high-level hyperscaler alignment into co-engineered integrations, standardized reference architectures, and platform partnerships to strengthen enterprise-scale agentic deployments. • **Enhance domain breadth:** Mindsprint can broaden its domain expertise and develop more industry-specific agentic offerings to extend applicability and repeatability across additional enterprise functions and verticals. • **Customer critiques:** Customers noted its uneven business-facing skills, developing domain depth, and a still-maturing global presence, while expecting stronger system integrator-partner capabilities. • **Partner critiques:** Partners encourage Mindsprint to expand its presence in Europe, accelerate GTM execution, deepen domain offerings, and strengthen skills on key enterprise platforms.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
SAP, Oracle, Snowflake, Microsoft, Google Cloud, AWS, ServiceNow, Inttra, Project44, Salesforce, Plainview, UiPath, Automation Anywhere, OpenText, KYP.ai	None	**Number of clients:** 5+ **Key clients:** • Global food and agri major • Leading food ingredient company • Global energy technology and power solutions leader • Leading industrial parks and infrastructure developer in Africa • Global digital health and medication management company	**Headcount:** 50+ **Delivery and innovation locations by major geo:** New Jersey, Singapore, Bangalore, Chennai Hybrid global delivery with centralized agentic-AI CoEs and distributed innovation pods	• **ProcureSPRINT™:** Agentic-AI procurement automation solution driving 25–30% efficiency improvement • **SPRINT AP™:** Agentic-AI powered accounts payable solution that reduces manual effort by 50% and improves accuracy to 99% • **Mindverse™:** AI marketplace with pre-built accelerators across GenAI, CV, and NLP for rapid customization and deployment • **AgentLens™:** Observability and telemetry platform enabling self-healing, compliance tracking, and agent performance optimization. • **AgentSprint™:** Framework for low-code agent design, orchestration, and scaling • **GuardianEye:** Agentic AI continuous penetration testing platform

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Mphasis: Embedding agentic AI across app development, IT infrastructure, and business operations

Strengths	Development opportunities
• **Value proposition:** Mphasis offers agentic AI solutions through its NeoIP™ platform, which uses specialized AI agents to automate and coordinate tasks across application development, IT operations, and business operations. It utilizes a dynamic enterprise knowledge system called Ontosphere, which helps companies make smarter decisions and continuously improve processes. • **Agentic tooling for enterprise operations automation:** Mphasis has proprietary orchestration tools such as InfraGenie™ and AI modules within NeoIP™. These support agentic AI-led execution, monitoring, and remediation across workflows, aided by frameworks such as NeoZeta™, NeoSaBa™, and AIOps for structured modernization and operations management. Ontosphere, a key component of NeoIP™, captures domain-specific enterprise context to enable context-aware decision making by AI agents. • **Enterprise-grade AI governance compliance:** Mphasis adheres to ISO/IEC 42001 standards in deploying agentic AI, ensuring that systems are ethically developed, monitored, and auditable. This supports responsible automation, regulatory compliance, and risk management in scaled AI adoption. • **Evidence of shift towards Services-as-Software:** Mphasis' NeoCrux™ platform delivered 40%+ developer productivity gains via reusable assets, AI-assisted coding, and software-led, outcome-based delivery. • **Outcomes:** Mphasis reduced the contact center load for a global bank with virtual assistants, automating 75% of transactions. It helped a global insurer reduce their code fix effort by 70% and build failures by 75% using AI tools. • **Customer and partner kudos:** Unable to share client and partner references for this study.	• **Expand ecosystem collaborations:** Mphasis must build and publicize a richer partner/start-up ecosystem for Agentic AI to accelerate domain-specific innovation and reduce reinvention. • **Improve case study narratives:** Mphasis must expand vertical-specific case studies that show the full lifecycle of agents, human-in-the-loop, and the decision layers integrated end to end (from strategy to design, to deployment to operations). Additionally, it should highlight large clients across geographies and industries, showcasing the breadth of deployments. • **Clarify agent capabilities and interactions:** The company should improve its transparency of agent autonomy levels, orchestration workflows, human-AI collaboration models, and lifecycle governance. • **Customer and partner critiques:** Unable to share client and partner references for this study.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, Kore.ai, WorkFusion, Databricks, Be Informed, Pega	• **2023: Silverline** (digital transformation consultancy and Salesforce partner); **eBECS** (specializes in Microsoft Dynamics 365 implementations, ERP, CRM, and managed services)	**Number of clients:** Not disclosed **Key clients:** • Leading global hardware manufacturer • Top 5 global financial services firm • Leading global insurer • Large real estate firm	**Headcount:** Not disclosed **Delivery and innovation locations by major geo:** 31 cities in US, Canada, Mexico, France, Germany, UK, Poland, China, India	• **InfraGenie™:** Platform for AI-enabled infrastructure operations automation and service management • **NeoIP™:** Unified AI platform of Mphasis' portfolio of agentic AI tools and frameworks for enterprise transformation with the Ontosphere knowledge graph at its core. Consists of **NeoZeta™** (enterprise modernization using knowledge graphs), **NeoCrux™** (engineering and AI-driven code generation), **NeoSaBa™** (product definition and agile engineering artifacts), **NeoRigal™** (AI governance and orchestration), **Mphasis AIOps** (proactive IT operations automation), **NeoOrko™** (managing models and knowledge operations), **NextOps™** (domain-specific business operations agents), and **NeoARCHE™** (routing compute workloads intelligently [CPU/GPU])

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Persistent Systems: Engineering-led agentic AI with scalable, governed execution

Strengths	Development opportunities
• **Value proposition:** Persistent Systems industrializes AI agents by combining proprietary platforms, managed services, and embedded governance to deliver scalable and outcome-driven digital workers across enterprise value chains. • **Patented, platform-driven agentic AI:** Persistent Systems has accelerated its agentic AI growth by launching NVIDIA-co-developed agentic solutions such as GenMolVS (solution for early-stage drug discovery) and ProcessIQ (automates end-to-end business functions and enhances decision making). It has 140+ NVIDIA-certified consultants, 16,000+ AI-skilled professionals, and 80+ patents. The company has been deepening its hyperscaler partnerships with AWS, Google Cloud, Microsoft Azure, and DigitalOcean to scale multi-agent deployments. • **Engineering-led, governed agentic execution at scale:** Persistent Systems stands out for its production deployments of multi-agent systems (e.g., agentic incident management in BFS and agentic reporting in life sciences), underpinned by proprietary platforms and frameworks spanning SDLC automation, data orchestration, agent studios, and deep integration into enterprise systems and workflows. It brings responsible AI rigor, experience-led agent design frameworks, and deep domain expertise in BFS and life sciences. • **Evidence of shift toward Services-as-Software:** For a leading Australian financial institution, Persistent Systems delivered a near-autonomous, agentic incident management service that runs continuously, replacing manual IT operations with outcome-driven, always-on operational software. • **Outcomes:** For a UK-based engineering and construction multinational, Persistent Systems used an agentic, multi-agent AI solution to optimize project planning and risk management, reducing analyst effort by 70%–80%. For a global life sciences analytics and CRO firm, it deployed agentic, multi-agent reporting automation, reducing reporting timelines by 95% and improving audit readiness by 90%. • **Customer kudos:** Customers appreciate Persistent Systems' innovation mindset, diligence, effort, and agility. • **Partner kudos:** Partners appreciate its growth mindset, new ideas, and collaborations.	• **Agentic ambition outpaces ecosystem breadth:** Persistent Systems must broaden its partner ecosystem, particularly across foundation models, enterprise platforms, and agent-native software providers, to sustain its momentum in agentic AI. • **Client evidence lags capability maturity:** While the agentic foundation is strong, greater visibility of scaled, outcome-owned agentic client stories is needed to fully substantiate its agentic AI ambitions. • **Customer critiques:** Some clients urge it to create/retain talent. • **Partner critiques:** A partner wants Persistent Systems to invest more in pre-sales and marketing and would like to see more speed and agility.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, NVIDIA, DigitalOcean, Automation Anywhere, Celonis, Workato	**2024: Arrka** (to advance data privacy, responsible AI, risk, governance, and compliance in AI-driven business transformation); **Starfish Associates** (enterprise comms automation platform) **2022: MediaAgility** (building on existing Google partnership); **Data Glove** (specialist in digital transformation using Microsoft technologies)	**Number of clients:** Not disclosed **Key clients:** • UK-based multinational engineering and construction enterprise • Global life sciences analytics and CRO enterprise • Leading Australian financial institution	**Headcount:** 16,000+ AI-skilled professionals **Delivery and innovation locations by major geo:** 40+ delivery locations in 21 countries across North America, Europe, Asia, Australia GenAI studios in US, India, UK AI labs in India	• **SASVA™:** Multi-agent, persona-driven orchestration for software and engineering workflows • **iAURA™:** Suite of AI-powered data solutions • **GenAI Hub™:** Enterprise agent platform with Agent Studio (low/no-code), MCP-based tool standardization, cross-LLM strategy, observability, and FinOps • **APEX:** Proprietary framework for AI experience design

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Sutherland: Operationally-grounded agentic AI with productized accelerators and built-in governance

Strengths	Development opportunities
• **Value proposition:** Sutherland's agentic AI–powered automation reduces manual work, accelerates decisions, and improves HR, coaching, and service operations, delivering measurable outcomes such as faster hiring and identity and access management (IAM) provisioning. • **Productized agentic offerings with scaled deployments:** HRVisionX, Coaching Capsule, and CoAG (conversational agent) function as productized, horizontal accelerators that integrate pre-configured agents, workflow templates, governance controls, data connectors, and orchestration layers. This structure gives clients a standardized, lower-risk pathway to deploy and scale agentic automation without the need for an extensive custom build. These agentic offerings are deployed in 25 enterprise clients (in FY2025) across BFSI, insurance, retail, healthcare, and CX/BPO. • **Operational heritage and delivery scale:** Sutherland brings decades of process-operations experience and a global delivery network supporting HR, customer service, and back-office functions. This operational depth is applied to translate domain needs into workflow design. It is also re-engineering 25 of its existing platforms to integrate the agent AI framework, propagating agentic capabilities across its portfolio. • **Evidence of shift toward Services-as-Software:** HRVisionX manages high-volume HR workflows autonomously and processes 10,000+ transactions per day, with CoAG deflecting 30%–40% tier-1 requests. • **Outcomes:** Sutherland's multilingual voice agent automated 70% of booking-related airline queries, driving down operational costs and AHT (average handling time), while enhancing customer experience in 12 languages. The AI coaching companion reduced coaching time by 40%, improved agent performance by 15%, and delivered an 11% CX uplift for a global customer-operations enterprise. • **Customer kudos:** A client notes that the Sutherland team is highly responsive and dedicated. Another was impressed with its breadth of knowledge. • **Partner kudos:** Partners commend its engineering, domain depth, talented teams, and customer-centricity.	• **Strengthen partner ecosystem with agentic AI startups:** Expanding partnerships beyond hyperscalers and Oracle to include agentic AI startups will enable faster innovation and lower the need to build capabilities internally. • **Shift from tactical fixes to enterprise transformation:** Sutherland should move beyond solving functional inefficiencies to orchestrating end-to-end, cross-enterprise agentic transformation, addressing structural data, process, and scalability constraints. • **Customer critiques:** A client was not satisfied with Sutherland's ability to transform business beyond technical implementation and wants it to improve its IP and co-innovation capabilities. • **Partner critiques:** Some want Sutherland to improve its limited IT brand visibility, concentration beyond US, decentralized IT systems, and speed-to-market.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Google Cloud, Microsoft, AWS, Oracle, NVIDIA	**2025: ATMECS** (advanced engineering R&D company) **2023: SuneraTech** (to strengthen capabilities in low-code orchestration and agentic frameworks) **2022: AugmentCXM** (AI-based CX management solutions for contact centers)	**Number of agentic services clients:** ~25 **Key clients:** • Leading global ecommerce • Leading consultancy firm • Leading provider of background checks • Global insurance major • Leading global BPO • Leading global retailer • American telecom giant	**Headcount supporting agentic services only:** 300+ **Delivery and innovation locations # and locations by major geo:** 10 global delivery centers with dedicated agentic AI delivery pods in North America (US, Canada), LATAM (Mexico, Colombia), EMEA (Poland, UK), APAC (India, Philippines) Innovation locations: Dedicated AI labs in US (Dallas), India (Hyderabad), Poland (Kraków)	• **HRVisionX:** HR transformation platform that embeds agents into the talent lifecycle, including recruitment, onboarding, workforce planning, learning, and employee services. • **Coaching Capsule:** Agent-led coaching and learning companion for employees and leaders that delivers performance insights and continuous feedback. • **CoAG (conversational agent):** Multi-domain conversational agent that provides contextual, goal-driven interactions across HR, customer support, and operations.

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Virtusa: Agentic grounded in domain depth and engineering rigor

Strengths	Development opportunities
• **Value proposition:** Virtusa helps enterprises move agentic AI from pilots to governed production by reimagining processes, embedding agents into real workflows, and operating them at scale with measurable ROI, control, and trust. • **Scaled agentic adoption and platform investment:** Virtusa reports 100+ agentic-services clients and 100+ agentic AI solutions running in production, with 50% of GenAI deployments evolving into agentic systems. Growth is supported by Helio (AI-native agentic platform layer) alongside a strong agentic ecosystem (e.g., LlamaIndex, Spark Beyond, Bloop), with 300+ predefined use cases, 50+ reusable agents, 5,000+ dedicated practitioners, and 4 active AI labs. • **Domain-led, production-grade agentic delivery:** Virtusa differentiates itself through domain-driven agentic architectures applied to live workflows across AI for engineering (agents for SDLC/PDLC productivity) and AI for business (agents for vertical and horizontal functions). Helio supplies reusable agents, governance, monitoring, and FinOps, integrating via A2A and MCP, while the consulting-led DFV (desirability, feasibility, and viability) reimagination framework enables faster, production-grade AI adoption. • **Evidence of shift toward Services-as-Software:** Virtusa makes limited claims about its progress toward Services-as-Software, so far preferring an emphasis on human in the loop. • **Outcomes:** A healthcare organization cut its appeals processing time from 37 to 15 minutes, unlocking $10.1 million in savings through agentic orchestration. A financial services firm reduced its legacy modernization effort by 70%–80% using Helio-powered engineering agents. • **Customer kudos:** Clients highlight Virtusa's responsiveness, nimbleness, stable senior talent, and ability to scale quickly while maintaining delivery quality. • **Partner kudos:** Partners value its strong solution design and architecture, deep customer context, domain expertise, and end-to-end engineering strength.	• **Advance Services-as-Software execution:** With agentic services still largely augmenting human delivery, Virtusa could accelerate maturity by shifting select workflows toward more software-led execution and experimenting with outcome-based models. • **Productize DFV reimagination:** DFV-led process reimagination is a strength, but greater productization of prioritization logic, ROI scoring, and risk assessment into reusable, software-supported tools can improve consistency, speed, and scalability. • **Customer critiques:** Clients cite opportunities to strengthen proactive project risk management, improve resource consistency, and accelerate year-over-year efficiency gains in managed services. • **Partner critiques:** Partners cite opportunities to strengthen third-party tool integration, clarify roadmaps, improve marketing alignment, and enhance long-term talent retention.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Google Cloud, AWS, Microsoft, LlamaIndex, Nanonets, W&B, Swantide, Spark Beyond, Kore.ai, Bloop, AgilePoint, NetoAI, Harness, IBM	None	**Number of clients:** 100+ **Key clients:** • 2 of the world's largest healthcare insurance companies • 2 of the largest global banks • Fortune 50 leader in financial services • Fortune 10 big tech giant • Fortune 50 global leader in healthcare products and services • Major European pharmaceutical company • Leading global mutual life insurance company	**Headcount:** 5,000+ **Delivery and innovation locations by major geo:** • 14 global delivery centers across India, US, Mexico, Bulgaria, Poland, Sri Lanka • 4 operational labs in New York, Hyderabad, London, San Francisco; 4 additional labs planned in the near future	• **Helio Platform:** Suite of agnostic agents and toolkits that are customizable to a client-approved ecosystem • **Helio Catalog:** Agent registry, workflow configurations, prompt templates, data quality rules, compliance frameworks, guardrails, use case libraries, and workshop and ideation templates • Toolkits supporting the full agent lifecycle, including **Helio Canvas** (use-case shaping and prioritization), **Helio Knowledge** (data and RAG preparation), **Helio Foundry** (agent build, deploy, gateway), and **Helio Responsible AI** (testing, monitoring, guardrails, and FinOps)

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Bain & Company: Agentic enablement for tech and business shift

Strengths	Development opportunities
• **Value proposition:** Bain & Company (hereafter Bain) focuses on measurable business outcomes (EBITDA, revenue, cost, customer metrics), positioning agentic AI as a structural technology-and-business shift rather than incremental automation. • **Advisory depth enhanced by ecosystem and investment integration:** Bain delivers agentic AI value through strategy, operating-model redesign, governance, and Vector (digital platform with 1,500+ engineers), using tools such as OpenAI's AgentKit. Through Bain Capital Ventures, it has invested in emerging agentic AI firms such as Decagon AI to provide market insights and ecosystem proximity, reinforcing its advisory credibility. • **Effective use of leading ecosystem tooling:** Bain strengthens its agentic AI delivery by leveraging OpenAI's agent frameworks and APIs, Microsoft's Azure OpenAI, and internal tools such as Sage to support agent deployment, workflow redesign, and insight generation, demonstrating integration capabilities even without a proprietary agentic platform. • **Evidence of shift toward Services-as-Software:** Bain helped embed agentic AI to run an end-to-end workflow (personalized marketing/engagement idea-to-launch) with near-zero handoffs. That is a service operation being productized into an autonomous software layer, not just a tool assisting humans. • **Outcomes:** Bain's agentic AI deployment helped orchestrate NatWest's personalized marketing idea-to-launch workflow end to end, reduced campaign cycles from weeks to near real time and significantly lowered manual effort in pilot use cases. It embedded agentic AI sales and training assistants in SleepExpert.AI, enabling a 12-week MVP and scaling the rollout to 6,000+ associates across ~2,300 stores. • **Customer kudos:** Mattress Firm praises Bain's strategic expertise, strong ROI modeling, and rapid delivery of custom agentic AI tools to speed up time-to-value. • **Partner kudos:** OpenAI finds Bain as a strategic consulting partner that helps enterprises translate foundation models into measurable, multi-industry outcomes.	• **Demonstrate agentic impact at scale:** Bain should showcase more named, in-production agentic deployments with quantified outcomes and client voices to improve credibility and accelerate buying decisions. • **Traditional consulting delivery model under pressure from AI:** Bain can move beyond tool deployment toward a more AI-first delivery model with clearer workflows and role definitions to help consultants shift from repetitive tasks to higher-value, client-facing work. • **Limited productized agentic AI stack:** Bain has articulated clear reference architectures and OpenAI-based tooling. However, it lacks a clearly publicly branded, standalone agentic AI product suite, relying more on methodology and co-built client solutions than on an identifiable, packaged agent platform. • **Temper agentic AI optimism in thought leadership:** Bain's thought leadership often highlights the transformative potential of agentic AI, but it could better balance this optimism with execution realities. Its own research shows that productivity gains remain uneven without end-to-end workflow redesign, underscoring the need to better align ROI narratives with current maturity.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
OpenAI, Microsoft, AWS, Shelton AI	• **2024: PiperLab** (AI/ML solutions) • **2023: Umbrage** (digital product studio for software solutions); **Max Kelsen's consulting and managed services divisions** (AI/ML solutions)	**Number of clients:** Not disclosed **Key clients:** • NatWest • Mattress Firm • Banco Bradesco • The Coca-Cola company • InsuranceCo	**Headcount:** 200+ deep analytics, academic, and software experts; 1,500+ partnering analytics and software engineers **Delivery and innovation locations by major geo:** 65 cities in 40 countries across North and Latin America, Europe, Middle East and Africa, Australia, Asia	• **Vector℠:** Digital delivery platform combining experts (data scientists, engineers, designers, consultants) with tools and technology that co-build software, data, and AI platforms with clients, including agentic systems • **Sage:** Platform powered by GPT-4 used to surface firm data, internal knowledge and accelerate insight generation for consultants

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Birlasoft: Domain-focused, task-oriented agentic and low-code delivery

Strengths	Development opportunities
• **Value proposition:** Birlasoft enables enterprises to adopt agentic AI at scale through end-to-end execution, starting from strategic use case discovery to rapid deployment, using prebuilt agents and low-code tools. Its platform delivers domain-specific intelligence, contextual automation, and enterprise-grade governance, ensuring secure, compliant, and measurable AI outcomes across industries. • **Delivering context-aware, task-oriented, domain-specific AI agents:** Birlasoft has developed 50+ prebuilt agent templates and deployed 70+ production-grade AI agents across 12+ enterprise environments, serving 9,000+ users. Demonstrated outcomes include 25%–40% cycle time reductions, a 30%–50% improvement in decision accuracy, and a 70% PoC-to-MVP conversion rate, reflecting strong enterprise adoption and measurable ROI. • **Fast, focused, and scalable delivery:** Birlasoft combines its Birlasoft Cogito platform (low-code tools, RAG pipelines, prebuilt agents, observability), use case curation frameworks (AI Opportunity Canvas, value heatmaps, feasibility scoring), and domain-specific agent pods in the pharmaceuticals, manufacturing, financial services, oil & gas, insurance, and hi-tech industries. It helps enterprises rapidly identify high-impact use cases and build and scale agentic AI solutions while ensuring domain alignment, low-code agility, and ease of integration. • **Outcomes:** Birlasoft deployed AI copilots for field engineering and contract intelligence, automating bug analysis and contract search/comparison, delivering major cycle-time, productivity, and risk-reduction gains. It built an AI-based BI copilot that unifies finance and operations data with natural-language queries, improving analysis speed by 40% and insights for 30+ personas. • **Customer kudos:** Clients appreciate its ability to reliably meet deadlines, speed in delivering additional expertise, strong India-based leadership, and highly-skilled data scientists. • **Partner kudos:** No response to our interview request.	• **Solve beyond tactical challenges:** Birlasoft has strong execution capabilities but must strengthen its strategic AI advisory through long-term roadmaps, AI operating models, and enterprise transformation strategies. • **Sharpen business impact storytelling:** Case studies should highlight measurable business outcomes such as revenue gains or cost savings, not just technical success. • **Customer critiques:** Clients expect Birlasoft to strengthen its upfront planning of dependencies and resourcing. • **Partner critiques:** No response to our interview request.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, OpenAI, Google Cloud, AWS, Cohere, Stability.ai, Automation Anywhere	None	**Number of clients:** 12+ active agentic AI enterprise engagements **Key clients:** • US technology company • Global leader in smart mobility technology • US-based pharmaceutical, biotechnology, and medical technologies companies • Japanese insurance group • Consumer financial services company	**Headcount for agentic services:** ~250+ specialists **Delivery and innovation locations by major geo** (in direct relation to agentic services): India (Pune, Noida, Bangalore [Agentic AI CoE], Hyderabad), US, Europe, APAC	• **Birlasoft Cogito:** Birlasoft's proprietary GenAI orchestration platform and agentic delivery framework • **Birlasoft Cogito Agent Studio:** Low-code environment to design, simulate, and deploy domain-specific agents rapidly

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IGT Solutions: Productizing agentic AI to transform travel, hospitality, and customer experience

Strengths	Development opportunities
• **Value proposition:** IGT Solutions empowers travel, transportation, and hospitality enterprises to enhance customer experience through AI-driven engagement, streamlining internal operations with intelligent automation, and transforming software delivery. • **IGT is productizing agentic AI for travel and CX at scale:** IGT Solutions scales agentic AI in CX and travel operations through TechBud.AI (enterprise GenAI/agentic assistant build layer), xBot.AI (agentic multilingual service automation), SDLC.AI (GenAI for code, migration, and testing), and FNI.AI (AI fare and refund automation). This is backed by Microsoft and AWS partnerships, IATA strategic-partner access to aviation use cases, and expanded European delivery via the 2025 Romania OSSR acquisition. • **Specialized TTH domain leadership with data integration and certified AI governance:** IGT Solutions combines deep travel and hospitality expertise with proprietary agentic AI platforms, modular solutions, and ISO 42001-certified governance, ensuring secure, scalable, and industry-aligned AI solutions. It also provides integration with external data systems such as Global Distribution System (GDS), New Distribution Capability (NDC), Passenger Service System (PSS), and WorldTracer. • **Evidence of shift toward Services-as-Software:** xBot.AI is delivered as a plug-and-play service that runs the entire support functions with agents and human-in-the-loop, improving containment without full-time human agents. • **Outcomes:** IGT Solutions deployed AI agents offering code validation, conversion, reverse engineering, and augmented testing for a US airline SDLC, reducing defects and vulnerabilities by >50%, and accelerating deployments up to 40%. It delivered an AI–enabled baggage tracking and claims platform for an air transport IT/telecom provider, enabling 360-degree visibility and reducing mishandling calls by 50%. • **Customer kudos:** Shared one client reference who didn't respond to our interview request. • **Partner kudos:** Partners praise IGT Solutions for delivering deep airline solutions, rapidly adopting new tech, providing cost-effective talent, and its global reach.	• **Prove agent autonomy at scale:** IGT Solutions should move beyond efficiency metrics to demonstrate externally validated, multi-step autonomous agent decision making with clear autonomy, governance, and outcome benchmarks. • **Expand use cases beyond the travel sector:** To strengthen its positioning, IGT Solutions should showcase AI outcomes in adjacent operations-intensive domains such as logistics and supply chain with clearer deployment metrics and external validations. • **Expand the partner ecosystem:** The company should broaden its technology and data partnerships to accelerate innovation, and scale agentic AI adoption faster. • **Customer critiques:** Shared one client reference who didn't respond to our interview request. • **Partner critiques:** IGT Solutions should strengthen its customer value communication, accelerate enablement after wins, and proactively surface and shape early-cycle opportunities.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, AWS, Zendesk, Databricks, Snowflake, MongoDB	**2025: OSSR** (BPO with tech-enabled services, AI, data-driven CX automation, analytics, and AI-powered solutions for logistics)	**Number of agentic services clients:** 9 **Key clients:** • Leading air transport communications and IT specialist • US travel and expense manager • Largest US airline with global network • Oman's flag carrier, Muscat-headquartered public airline • US travel metasearch and fare aggregator • Flag carrier based in Abu Dhabi	**Agentic services headcount:** 75–100 **Delivery and innovation locations by major geo:** 3 AI labs and 31 delivery centers globally	**TechBud.AI:** Unified platform for building, deploying, and scaling agentic AI solutions that provide a standardized foundation of reusable components, orchestration engines, and integration accelerators **Other offerings: xBot.AI** (multilingual, GenAI-powered virtual assistant that automates customer support, escalates complex queries, and integrates across channels), **FNI.AI** (AI-powered fare and refund interpretation system that automates end-to-end refund workflows), **iQD** (AI-driven work allocation platform integrated with GDSs and messaging platforms, acting as a virtual switchboard for task routing, tracking, and optimization), and **SDLC.AI** (platform to automate and accelerate the software development lifecycle using GenAI)

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Innova Solutions: Business-led accelerated multi-agent workflows built on open frameworks

Strengths	Development opportunities
• **Value Proposition:** Innova Solutions combines domain consulting and full-stack AI and automation through Innova.AI's Advisory-Adoption-Application journey to move clients from siloed RPA to multi-agent workflows across business, IT, and engineering. • **Enterprise adoption of agentic systems:** Innova.AI (Innova's unified operating layer) underpins 30+ enterprise-scale agentic deployments (e.g., pre-authorization, claims pend automation, telecom auto-resolution, and unemployment insurance workflows), with 500+ production agents operating across business, IT, and engineering functions, delivered by 750+ specialists across 11+ global centers. • **Advisory-led, adaptive multi-agent delivery:** Innova Solutions applies business-first advisory to architect agentic systems through a flexible multi-agent build model across open frameworks (LangChain, LangGraph, CrewAI) and hyperscaler platforms (Microsoft Foundry, Google Agentspace, AWS Bedrock). This is anchored on an API-first data fabric and an agentic data layer using model context protocol (MCP) with embedded guardrails, privacy controls, and observability. • **Evidence of shift toward Services-as-Software:** Innova Solutions' reusable agentic components, including document intelligence and data engineering accelerators, show early signs of Services-as-Software adoption, although offerings remain delivered through a platform-accelerated services model. • **Outcomes:** A health insurer reduced engineering cost by 30%–50% using agentic data-engineering automation. A life sciences firm cut manual sales tasks by 40% via conversational insights. A healthcare provider achieved 98% extraction accuracy using multimodal document-processing agents. • **Customer kudos:** A client acknowledges its ability to translate business processes into technical execution with a value-focused, collaborative partnership approach. • **Partner kudos:** Partners value its thought leadership in AI-powered quality engineering and disciplined focus on defining, measuring, and delivering ROI in joint agentic engagements.	• **Advance Services-as-Software delivery:** Innova Solutions must evolve its Innova.AI accelerators from services-led frameworks into configurable, modular components to reduce customization effort and support more productized, repeatable deployment models aligned to software-first agentic delivery. • **Strengthen enterprise-scale transformation framing:** The company must articulate how agentic systems integrate with broader process reimagination and enterprise-wide scaling models to help clients move from workflow automation to organization-level adoption and sustained autonomous operations. • **Customer critiques:** A customer cited limited European presence and would appreciate stronger local language support and deeper EU AI regulatory alignment. • **Partner critiques:** Partners noted the need for broader European coverage, more creative commercial models, and tighter sales and presales collaboration.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, Functionize, UiPath, Autonomize AI, Tricentis	**2022: Volt** (global staffing and workforce solutions provider focused on technology, engineering, and industrial talent)	**Number of clients:** 80+ **Key clients:** • Leading healthcare insurer • Healthcare insurance provider • American healthcare medical device manufacturer • Leading telecom provider	**Headcount:** 750+ AI and automation experts **Delivery and innovation locations by major geo:** 11+ delivery centers • North America: Tampa, Atlanta, Dallas, Piscataway, Monterrey • APAC: Hyderabad, Chennai, Bengaluru, Mumbai, Noida • EMEAL: London, Nice, Munich, Brussels • 10 AI labs in Mexico, US, India	• **Innova.AI:** Unified operating layer with reusable agentic accelerators for document intelligence, claims automation, data engineering, and test lifecycle workflows, enabling faster design and deployment of multi-agent workflows across enterprise functions • **AiFICIENT:** Innova Solutions' AI-first operating philosophy, embedding AI across solution design, engineering, and delivery to support business transformation, product and platform engineering, and IT optimization with measurable outcomes

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Movate: CX-first agentic services spanning customer operations, engineering, and analytics

Strengths	Development opportunities
• **Value proposition:** Movate is a CX-first, agentic services provider aiming to improve customer support quality and accelerate AI-enabled SDLC to drive faster insight-to-action through analytics while amplifying existing enterprise platforms. • **Scaled agentic services expansion:** Movate has established a 220-plus FTE agentic services organization. It has three India-based delivery centers and three AI Innovation Labs, with plans for lab expansion through targeted acquisitions across CX, ITSM, analytics, and Salesforce-led workflows. It supports scaled CX-centric agentic deployments on AWS and Azure. • **Context-driven CX agentic delivery:** Movate architects CX-first agentic ecosystems that begin with AI data readiness and FAIR principles (to make data findable, accessible, interoperable, and reusable) using context-driven intelligence, integrated through MCP/A2A and Mindful AI (policy-aware AI with auditable, HITL guardrails). This enables it to deliver repeatable offerings such as OnDemand for CX outcomes, Quality Soundboard for continuous QC/QA, and Agentic App Engineering Accelerators for SDLC to amplify existing CRM, ITSM, CCaaS, and SDLC investments. • **Evidence of shift toward Services-as-Software:** Movate ran gift card redemption as an autonomous CX service for a global consumer brand, using advanced routing, anomaly detection, and validation across three lines of business (LOBs), achieving 99% SLA compliance, a 65% MTTR reduction, and a 50% reduction in agent staffing. • **Outcomes:** A global enterprise improved its engineer productivity by over 25% with 98% ticket-routing accuracy by deploying an agentic service desk and DevOps copilots. A multinational services organization reduced TCO by 20% and automated 50% of installation bookings by consolidating CX. • **Customer kudos:** A client highlights its agility and collaborative delivery that resulted in strong performance and cost savings. • **Partner kudos:** A partner commends its clear AI strategy, deep end-to-end engineering and CX capabilities, and flexible, risk-sharing approach.	• **Scale reusable agents beyond CX:** Movate's most repeatable agentic bundles are CX-led. Expanding standardized agent patterns more clearly into ITSM, SDLC, and analytics can increase reuse and accelerate enterprise-wide adoption. • **Formalize agent lifecycle governance:** Movate shows strong Mindful AI controls. Packaging these into a clearer end-to-end agent lifecycle framework can further strengthen governance and enterprise confidence at scale. • **Customer critiques:** A client seeks broader LOB coverage and greater flexibility to transition from proprietary to enterprise platforms. • **Partner critiques:** A partner noted the need for broader vertical coverage and a stronger delivery presence in APAC.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Microsoft, Google Cloud, Salesforce, ServiceNow, Databricks, Reef.ai, Lyzr, Uniphore, amplifAI, Yellow.ai, Anzenna, Opsera, NICE, DataOrb, Krisp, GitHub	**2025: Trianz ServiceNow Practice** (agentic AI in ITSM and enterprise workflows); **Prescience Data Solutions** (cloud-native AI, data engineering, and decision-intelligence stack); **Solomo** (Salesforce + data and AI consulting firm with deep healthcare expertise) **2022: OnDemand** (AI-augmented gig delivery platform)	**Number of clients:** 40+ agentic services clients **Key clients:** • Global consumer technology provider • Leading gaming platform • Global network infrastructure provider • Global cybersecurity provider • Global private equity firm • Leading multinational cosmetics company	**Headcount:** ~220 FTEs dedicated to agentic services, supported by 550+ AI specialists **Delivery and innovation locations by major geo:** • 3 agentic AI delivery centers + 3 AI innovation labs in India • 2–3 new labs planned in the next 18–24 months	• **Movate RISE Foundry:** AI orchestration, observability, and autonomous ops • **OnDemand:** Patented Agentic CX and gig platform. • **Quality Soundboard:** Agentic QC/QA engine • **Agentic App Engineering Accelerators:** SDLC and QE copilots and reusable flows • **Data Sentinel:** Data quality engine • **Movate Contelli:** IT management platform • **Movate Edison:** CX transformation platform

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PwC: Delivering agent-powered enterprise services with governance and proven impact

Strengths	Development opportunities
• **Value proposition:** PwC enables enterprises to deploy agentic AI safely at scale by combining agent-assisted decisioning with governance, industry expertise, and measurable business (decisiveness, productivity, cost, and risk) outcomes. • **Shifting from advisory to agent0-powered enterprise services:** PwC has strengthened its agentic AI capabilities by acquiring AI-engineering firm Kunai, launching its proprietary Agent OS, deploying 250+ internal AI agents, and scaling enterprise agent portfolios with ecosystem partners such as Microsoft, Google Cloud, Salesforce, CrewAI, and ContractPodAi. These efforts are reinforced by the launch of an Agentic Innovation Lab in the UK, scaling of agent portfolios across EMEA, and investments exceeding $1 billion in AI training, platforms, and delivery capabilities. • **Agentic and AI-orchestrated capabilities embedded into core service delivery:** PwC's agentic AI capabilities include packaged, client-facing agentic solutions such as its AI-powered contact center, a growing library of reusable agent components and workflow blueprints, and advanced audit and assurance automation tooling that embeds agents directly into core service delivery. These capabilities enable PwC to operationalize agentic AI across front, middle, and back-office functions to deliver measurable productivity, cost, and experience outcomes. • **Evidence of shift toward Services-as-Software:** PWC's agentic AI-powered contact center is a packaged, repeatable, agent-run service engineered for non-linear cost and CX outcomes rather than one-off consulting delivery. • **Outcomes:** PwC deployed Salesforce-based AI agents to automate support for a hospitality franchise's workflows, reducing review time by 94% and calls by 30%–50%. It enabled agentic AI orchestration across a hyperscaler's third-party risk and invoicing workflows, reducing manual effort by 85% and cutting down costs by 60%. • **Customer kudos:** Clients appreciate PwC's ability to integrate advanced technologies seamlessly into its internal operations. • **Partner kudos:** Not available	• **Accelerate Services-as-Software evolution:** PwC should further its package agentic capabilities into agent-run, outcome-based services that execute work continuously via software, enabling non-linear scale and reduced labor dependence. • **Enhance agentic AI innovation focus:** PwC's agentic AI narrative is around efficiency and is risk-led. A stronger emphasis on agent-enabled business model innovation for greater value creation can strengthen its market positioning. • **Showcase and productize industry-first narratives:** PwC has strong sector expertise but needs clearer, branded, industry-specific agentic offerings with repeatable use cases and measurable outcomes beyond horizontal platforms. • **Customer critiques:** Customers have called out its premium pricing compared to other system integrators. • **Partner critiques:** Not available

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
Microsoft, Google Cloud, CrewAI, Salesforce, SAP, Oracle, Workday, Automation Anywhere, ContractPodAi	**2025: Kunai** (AI-engineering and software consultancy for financial services) **2023: Megabyte Limited** (engineering services; **InfoCycle** (specializes in data risk capabilities) **2022: Sagence** (data management and analytics consulting firm); **Netrovert** (Salesforce MuleSoft enterprise integration consultancy); **Venerate Solutions** (Salesforce consulting firm)	**Number of clients:** Not disclosed **Key clients:** • Global retailer • Leading software company • Multinational manufacturer • Large financial institution • Clinical research and life sciences organization	**Headcount:** 3,200+ AI champions and specialist AI teams **Delivery and innovation locations by major geo:** Operates out of 130+ countries across Americas, Asia/Asia Pacific, Western Europe, Eurasia, Middle East and Africa; specialized agentic AI labs in UK, India, US, Netherlands	• **Agent OS:** Proprietary enterprise platform that designs, orchestrates, governs, and scales AI agents across business workflows. Includes agentic workflow orchestration framework, responsible AI and agent governance frameworks, multi-agent sector and function-specific blueprints and patterns (e.g., for finance, legal, operations, clinical research).

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UST: Driving intelligent automation by delivering governed, industrialized agentic AI with long-term commitment

Strengths	Development opportunities
• **Value proposition:** UST helps organizations implement intelligent automation with multi-agent systems using AI acceleration toolkits, data platform modernization, and business process automation across the full agent lifecycle improving productivity and saving costs. • **Well-structured agentic AI ecosystem:** UST has built a structured ecosystem to support agentic AI adoption, including its Agentic AI Factory, an internal agent marketplace, 20+ prebuilt reusable use cases, and integration with open frameworks such as Langgraph and LangChain. This provides flexibility for implementation across clients' varied existing enterprise platforms. Also, UST GenAI Sandbox includes 100+ pre-configured GenAI cards (composable primitives) that can be assembled into agents. UST has also invested in ISG's automation unit (enhancing intelligent automation capabilities), aiOla (voice + conversational AI platform), and the Experian partnership to enhance AI innovation in financial services. • **Long-term enterprise commitment and strong governance framework:** UST positions itself as a long-term transformation partner backed by sustained client relationships averaging over 15 years. Its scalable AI frameworks include governance for ethical deployment, ensuring that AI systems are ethical, explainable, and compliant by managing data use, model training, and decision processes. • **Evidence of shift toward Services-as-Software:** UST deployed CodeCrafter to automate code transformation from legacy scripts to PySpark. By migrating ~1,600 legacy DB scripts to PySpark in 12 weeks, it achieved 88% faster execution relative to a traditional manual modernization timeline. • **Outcomes:** UST built a self-service NL-to-SQL analytics assistant for a large healthcare organization, lowering time from business question to BigQuery insight from days to minutes. It enabled a large financial institution to search unstructured documents via secure RAG, cutting discovery time by >50% with sub-second answers. • **Customer kudos:** References didn't respond to our interview requests. • **Partner kudos:** A partner praises UST for its agility, multinational presence, and strong IP-led development capabilities.	• **Deepen business value articulation:** UST can enhance its value proposition by clearly quantifying ROI across diverse use cases and shifting emphasis from technical depth to broader strategic business transformation outcomes. • **Expand vertical-specific demonstrations:** UST can highlight its industry expertise through more verticalized agents, tailored workflows, and detailed case studies in sector-specific contexts. • **Demonstrate internal application at scale:** The company can better showcase how it leverages agentic AI for its own engineering effort toward a client-zero approach to validate solutions. • **Customer critiques:** References didn't respond to our interview requests. • **Partner critiques:** A partner wants UST to expand into more categories, diversify geographically, and further strengthen its product-led approach.

Key partnerships	Mergers and acquisitions (2022–2025)	Clients	Global operations and resources	Flagship IP
AWS, Google Cloud, Microsoft, Dynamic 365, Salesforce, SAP, ServiceNow, Workday, Snowflake, UiPath, T-Hub, Experian	**2024: Automation unit of ISG** (automation solutions for business processes)	**Number of clients:** 25 **Key clients:** • Multiple large financial services providers • Multiple large healthcare providers • Multiple large consumer packaged goods companies	**Headcount:** 1,300+ **Delivery and innovation locations by major geo:** 50 delivery centers across North America, Europe, APAC 3 AI labs in US (GenAI and agentic AI with research collaborations at MIT and Stanford), UK (responsible AI), India (AI-based SDLC modernization)	• **Agentic AI Factory:** Provides infrastructure, tools, and templates to accelerate the deployment of agentic and GenAI solutions, including orchestration, policy guardrails, and observability • **Codecrafter:** Uses agentic AI to automate legacy code transformation. • **SmartOps:** Automates business processes using AI • **SmartGenie:** Enables multi-agent orchestration across modern and legacy IT systems, integrating APIs, cloud services, and enterprise apps • **UST Responsible Rails:** Governance framework ensuring AI systems are ethical, explainable, and compliant by managing data use, model training, and decision processes

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Phil Fersht
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Phil Fersht is widely recognized as the world's leading analyst focused on reinventing business operations to exploit AI innovations and the globalization of talent. He recently coined the term "Services-as-Software" to describe the future of professional services, where people-based work is blurring with technology.

Fersht identifies change agents enabling organizations to access critical data and exploit the huge global talent base. He trademarked the term "Generative Enterprise" in 2023, articulating the pursuit of AI technologies based on Language Models to reap huge business benefits for organizations seeing to continuously generating new ideas, redefine how work gets done, and disrupt business models steeped in decades of antiquated processes and technology.

His reputation drove him to establish HFS Research in 2010, which today is one of the leading industry analyst and advisory firms and the undisputed leader in business and tech services and process technologies research.

In 2012, he authored the first analyst report on Robotic Process Automation (RPA), introducing this topic to the industry. He is widely recognized as the pioneering analyst voice that created and inspired today's RPA and process AI industry.

Fersht coined the term "OneOffice" in 2016, which describes HFS' vision for future business operations amidst the impact of cloud, automation, AI, and disruptive digital business models. OneOffice is the foundation of the hybrid (virtual-physical) workforce, where automation and AI tools augment the employee's digital capabilities, and the workplace becomes a plug-and-play, work-from-anywhere scenario. Silos between front and back-office are collapsed into one single office, where employees are empowered and motivated by common outcomes and values.

Prior to founding HFS in 2010, Phil has held various analyst roles for Gartner (AMR) and IDC and was BPO Marketplace leader for Deloitte Consulting across the United States. Over the past 20 years, Fersht has lived and worked in Europe, North America, and Asia, where he has advised on hundreds of operations strategies, outsourcing, and global business services engagements.

He is also the author of the most widely read and acclaimed blog in the global services industry, "Horses for Sources," which is now entering its 19th year. He regularly speaks at major industry events such as NASSCOM, ABSL, and HFS Research Summits. He has been named Analyst of the Year three times by the Institute of Industry Analyst Relations.

David Cushman
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David Cushman is an executive research leader for HFS Research. He has a long-term focus on emerging technology, tracking OneOffice™ and OneEcosystem™ enablers from automation, artificial intelligence (AI), generative AI (GenAI), data and design thinking, Web3 and metaverse, process orchestration, workflow, and intelligence to quantum computing. He also leads the HFS Hot Tech program.

Experienced in startup, scale-up, and large-scale digital transformation programs, David has led digital development at the UK's fastest-growing media company, founded and grown digital consultancies across Europe, and worked with world-class companies as a director in digital strategy advisory at a Tier 1 services provider.

The author of The 10 Principles of Open Business (Palgrave Macmillan, 2014), David earned a joint honors degree in philosophy and sociology from the University of Essex.

He lives in Cambridgeshire, UK, with his wife and daughter and enjoys reading, writing, travelling, and thinking (exploration of all kinds). David embraces change and always seeks learning opportunities. But, for all that, he has been a supporter of Leeds United Football Club since he was seven years old. Some things just cannot be unlearned.

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Niti Jhunjhunwala is a senior analyst for HFS Research. Her coverage areas include banking and financial services and GenAI. She also regularly contributes to competitive intelligence across IT and business process services and the HFS Market Index, a quarterly report that analyses the performance and major developments of top service providers over the past quarter.

Niti joined HFS with more than six years of experience in market research. Previously, she worked with Kantar (a leading data, insights, and consulting company). Her responsibilities included leading end-to-end research studies and delivering client presentations.

She earned an MBA in finance and marketing and B.Tech degree in information technology

Niti is based out of Kolkata, India. In her spare time, she loves reading, traveling, and going for walks. On weekends, she enjoys painting, spending time with her nephew, and binge-watching series.

Jason Dann
Research Analyst
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Jason Dann is a Research Analyst at HFS Research and is based in Boston, MA. He focuses on the evolving landscape of sports technology and the broader services ecosystem that supports enterprise transformation. His work spans multiple industries, with a particular emphasis on how service providers enable organizations to meet their strategic objectives.

Jason leads HFS's research in the Sports & Entertainment space, drawing on his background as a former college athlete and his deep interest in the intersection of sports and technology. He is especially focused on how innovation is enhancing operational performance and delivering superior experiences for both sports organizations and
their fans.

He holds a degree in marketing from Bridgewater State University. In his free time, Jason engages in weightlifting and various sports. He's an avid supporter of all Boston teams, especially the Celtics and Red Sox.

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