ISG Provider Lens®

Agentic AI Services

A comparative analysis of service providers assessing innovation, scale and governance in agentic AI services



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Agentic AI differentiation is shifting from building agents to engineering enterprise delegation

This ISG Provider Lens® study evaluates large and midsize providers delivering agentic AI services globally, spanning strategy, design, development, deployment, integration, governance and production-scale operations. The assessment examines how providers help enterprises move from AI that primarily informs and assists employees toward systems that can coordinate and execute work, while maintaining the controls, integration and accountability required for enterprise use.

Market context

Agentic AI moves from experimentation toward enterprise execution

Agentic AI has rapidly become a major area of enterprise and provider investment as advances in reasoning, tool use, memory and orchestration extend what AI systems can perform beyond generation and recommendation. This direction is consistent with ISG's 2026 AI Value Study, which points toward a changing division of work in which AI is expected to perform more activities while people increasingly review, intervene and retain responsibility where required.

However, implementation reality remains more measured than the pace of technology development and market attention. Agent technology is advancing considerably faster than the delegation of business responsibility, with enterprise implementations showing greater evidence of agents coordinating and performing bounded work than independently owning consequential processes. Large provider cases extend further into cross-system execution and higher levels of workflow responsibility, while midsize providers show substantial evidence of focused, bounded execution supported by applied engineering and reusable workflow patterns. The distinction reflects different implementation strengths rather than a simple progression from lower to higher maturity.

Agent technology is **scaling faster** than **enterprise willingness** to **delegate authority**.

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This distinction is becoming increasingly important as the market moves beyond agents performing individual actions to enterprises allowing them to operate reliably across systems and workflows. Greater agency introduces questions around accountability, permissions, security, governance and operational risk because an incorrect response becomes more consequential when AI can update records, trigger processes, communicate externally and change the state of enterprise systems. ISG research reinforces the growing importance of this control layer: 79 percent of enterprises plan to increase AI technology spending, while improved governance is the most significant change organizations say they would make based on their AI experience to date.

The business test is shifting from what agents can technically perform to the enterprise tasks they can reliably undertake. AI's economic value depends less on the number or sophistication of agents deployed and more on whether agentic AI can reduce workflow latency, coordination effort, human handoffs and processing intensity while maintaining acceptable levels of reliability and control.

Enterprise priorities

Identify where agency creates meaningful process value

Enterprises need to distinguish workflows that benefit from greater AI agency from those where assistance or decision support remains more appropriate. Agentic AI creates particular value where work spans multiple steps, information sources, systems and actions that can be coordinated within clear operating boundaries.

The economic opportunity extends beyond individual productivity by connecting machine intelligence to execution, reducing human effort across workflows while improving cycle times, throughput, responsiveness and service capacity. Suitability for agency depends less on reasoning complexity alone than on whether decisions are bounded, systems are machine-operable, outcomes observable and exceptions manageable. ISG's AI Value Study reinforces this foundation, with enterprises prioritizing connectors, legacy modernization, reusable workflows and standardized data to make applications and processes accessible to AI.

Determine how much responsibility AI should receive

Agency becomes more consequential when AI moves from recommendations toward changing enterprise state by routing work, updating systems, triggering processes, communicating or remediating issues. Enterprises therefore need to determine not only what agents can do, but what authority they should receive.

Autonomy is consequently an incomplete measure of maturity. A controlled system executing consequential operational actions can exercise greater business agency than a highly autonomous system performing low-consequence work. As agency increases, human participation also shifts toward validation, approvals, exceptions, supervision and consequential authority. Authentication, approvals and audit trails similarly support controlled delegation. The objective is therefore not maximum autonomy, but the economically appropriate allocation of responsibility between machines and people.

Make execution dependable and governable

Agents require controlled access to applications, data and tools, with permissions defining what actions they can perform and under which conditions. Validation, observability, escalation and recovery become equally important when actions produce unexpected results.

Controls can therefore enable rather than simply restrict agency. Rules, thresholds, approvals, policy constraints and exception paths create boundaries within which probabilistic intelligence can execute useful work. Observable outcomes strengthen this model further by allowing systems to validate resulting state changes and determine whether execution should continue or escalate.

Integrate agency into enterprise systems and workflows

Reasoning and orchestration create limited value if the enterprise environment cannot support action. APIs, applications, workflow

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systems, identity controls, enterprise data and conventional automation remain fundamental.

Agentic AI therefore extends rather than replaces existing automation. Agents can provide contextual interpretation and dynamic coordination while deterministic systems retain activities requiring precision and predictable execution. The enterprise challenge is determining where these capabilities should combine and where greater agency creates enough value to justify its additional complexity and control requirements.

Provider dynamics

Provider responsibility expands from agent engineering toward delegation engineering

Providers are rapidly industrializing the technical foundations required to build agents through frameworks, orchestration platforms, agent factories, reusable agents and integrations. Although these capabilities remain important, the growing availability of agent engineering shifts focus toward how providers translate technical agency into useful enterprise responsibility.

This change is shifting provider differentiation toward delegation engineering: determining which parts of a workflow AI should perform, what authority agents should receive, which enterprise systems and tools they can access, where deterministic controls should remain and when responsibility should return to a human. The strongest capabilities combine agent engineering with process knowledge, integration, governance and operating model understanding rather than treating the agent itself as the complete solution. ISG's research on managed services buying priorities reinforces this approach, with enterprises seeking stronger industry-specific solutions, legacy integration, faster implementation and change enablement as they evaluate providers against operational responsiveness, productivity and measurable outcomes.

Large providers show greater evidence of agentic AI spanning multiple enterprise systems and assuming deeper workflow responsibility, where extensive integration capabilities, governance experience and exposure to complex operating environments become relevant. Midsize providers demonstrate a different form of leverage through focused workflow engineering, bounded execution and reusable implementation patterns that can make well-defined processes faster to industrialize. The distinction is not simply the sophistication of the agents deployed, but whether providers differentiate through the breadth of enterprise execution and the precision and repeatability with which agency is applied to particular workflows.

Production capability expands toward controlled and observable execution

Production agentic AI requires providers to engineer the environment surrounding agent behavior as carefully as the agents themselves. Identity, permissions, tool access, observability, evaluation, policy controls, deterministic validation, human escalation and exception management become part of the execution architecture as agents interact with enterprise systems.

The ability to close the loop between action and outcome also becomes increasingly important. Agentic systems can assume greater responsibility when their actions create observable state changes that can be validated, allowing successful execution to continue while exceptions are detected and escalated. This shifts production engineering from keeping an AI application available toward maintaining dependable execution across changing workflows and operating conditions.

Composite architecture remains important in this environment because agentic AI extends existing automation rather than replacing it. GenAI, retrieval, conventional ML, rules, APIs, workflow engines, enterprise applications and human controls increasingly operate together, requiring providers to engineer the boundaries between probabilistic reasoning and deterministic execution according to work consequences.

Industrialization moves from reusable agents toward repeatable workflow execution

Although agent frameworks, reusable agents and factories can accelerate development, they do not establish that a provider can

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repeatedly transfer meaningful enterprise work to AI. Deeper industrialization emerges when providers reuse knowledge of workflow structure, integrations, permissions, controls, evaluation, exception patterns and operating practices across implementations.

Workflow patterns may consequently become a more durable unit of reuse than individual agents. The domain information involved in an implementation can vary substantially between enterprises, while patterns such as intake, interpretation, decision, action, validation and exception management recur across many operational processes.

Competitive progression moves from reusable agent technology toward reusable execution and assurance patterns, and eventually toward sustained AI-enabled operations. Providers that standardize the machinery required for controlled execution while adapting domain context and business rules to the client will be better positioned to make agentic AI repeatable without reducing it to generic automation.

Outlook

Competitive frontier moves from agents toward enterprise agency

Over the next 12-24 months, agent frameworks, orchestration capabilities, tool integration and reusable agent components will continue to improve, making the technical creation of agents progressively more accessible. This change will increase the number of agents available to enterprises without necessarily producing an equivalent increase in meaningful business agency.

Controlled workflow execution is likely to expand more quickly than unrestricted autonomous operation as enterprises gain confidence in delegating bounded responsibilities where actions, outcomes and exceptions can be observed and governed. Although large provider implementations already indicate a deeper agency frontier, the broader large and midsize market continues to show that technically sophisticated agents and consequential enterprise authority progress at different speeds.

Enterprise maturity will become harder to judge from agent adoption alone. Multi-agent architecture, orchestration sophistication and autonomy provide incomplete measures when they do not establish where AI operates, what authority it receives and the consequences of exercising that authority. The more important question is how effectively enterprises allocate responsibility between machines and people while improving the economics and performance of the overall workflow.

The competitive test for service providers will evolve parallelly as building agents remains necessary but becomes less sufficient with the maturation of frameworks and engineering foundations. Greater differentiation will come from understanding enterprise processes, integrating execution across systems, engineering controls and exceptions and making successful delegation patterns repeatable across clients and workflows.

For large and midsize providers, leadership in agentic AI will increasingly depend not on maximizing the autonomy of agents, but on repeatedly engineering the right level of AI responsibility for consequential enterprise work.

> Agent factories demonstrate the ability to produce agents; stronger industrialization demonstrates the ability to repeatedly engineer safe and consequential workflow responsibility.
>
> Greater agency does not require the disappearance of human control. As AI performs more work, human involvement increasingly moves toward exceptions, supervision and consequential authority.

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Provider Positioning

Page 1 of 6

	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
Accenture	Leader	Not In
Accion Labs	Not In	Leader
Akkodis	Product Challenger	Not In
Altimetrik	Not In	Product Challenger
Apexon	Not In	Leader
Ascendion	Not In	Leader
Aspire Systems	Not In	Product Challenger
Atain	Not In	Contender
Atos	Leader	Not In
Birlasoft	Not In	Leader

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Provider Positioning

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	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
Brillio	Not In	Leader
Capgemini	Leader	Not In
CGI	Contender	Not In
CI&T	Not In	Product Challenger
Coforge	Not In	Product Challenger
Cognizant	Leader	Not In
Cybage	Not In	Leader
Deloitte	Market Challenger	Not In
DXC Technology	Leader	Not In
EPAM Systems	Contender	Not In

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Provider Positioning

Page 3 of 6

	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
EXL	Not In	Leader
Firstsource	Not In	Leader
Fujitsu	Market Challenger	Not In
Genpact	Rising Star ★	Not In
Happiest Minds	Not In	Contender
HCLTech	Leader	Not In
Hexaware	Not In	Leader
HTC Global Services	Not In	Rising Star ★
IBM	Leader	Not In
Indium Software	Not In	Product Challenger

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Provider Positioning

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	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
Infosys	Leader	Not In
Innova Solutions	Not In	Contender
ITC Infotech	Not In	Product Challenger
Konecta	Not In	Leader
Kyndryl	Product Challenger	Not In
LTM	Product Challenger	Not In
Mastek	Not In	Contender
Mindsprint	Not In	Product Challenger
Movate	Not In	Product Challenger
NTT DATA	Leader	Not In

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Provider Positioning

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	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
Orange Business	Product Challenger	Not In
Orion Innovation	Not In	Product Challenger
Persistent Systems	Not In	Leader
Qburst	Not In	Contender
Rackspace Technology	Product Challenger	Not In
Rsystems	Not In	Contender
Softtek	Not In	Leader
Sopra Steria	Contender	Not In
Stefanini	Not In	Market Challenger
Sutherland	Not In	Leader

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Provider Positioning

Page 6 of 6

	Agentic AI Development and Deployment Services — Large Providers	Agentic AI Development and Deployment Services — Midsize Providers
TCS	Leader	Not In
Tech Mahindra	Product Challenger	Not In
TP	Market Challenger	Not In
Trigent	Not In	Leader
T-Systems	Product Challenger	Not In
Unisys	Not In	Leader
Virtusa	Not In	Leader
Wipro	Product Challenger	Not In
Xoriant	Not In	Contender
YASH Technologies	Not In	Product Challenger
Zensar Technologies	Not In	Market Challenger

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The study analyzes market trends, provider capabilities and competitive dynamics shaping **agentic AI and autonomous systems**' evolution.



Simplified Illustration Source: ISG 2026

Definition

Agentic AI is the ability to take autonomous actions across multiple processes or systems based on an understanding of the environment and desired outcomes. In 2026, agentic AI is rapidly evolving from experimental pilots to enterprise-priority initiatives and a foundational layer for next-generation digital and autonomous operations. Unlike traditional AI systems that follow predefined workflows, agentic AI can autonomously plan, reason, orchestrate tools and collaborate across systems to achieve complex objectives with minimal human intervention.

Enterprises are moving beyond isolated PoCs to use cases that support multi-agent ecosystems, process orchestration and adaptive workflow automation. Advances in long-context models, multimodal capabilities and distributed agent architectures are enabling scalable deployment across customer operations, IT, finance, supply chain and knowledge-intensive functions.

Meanwhile, organizations are prioritizing production-grade readiness, focusing on observability, governance, security, cost optimization and integration with legacy systems. In the future, as agent autonomy increases, so will the need for explainability, accountability frameworks and human-in-the-loop controls to ensure compliance and risk mitigation.

Leading service providers are differentiating through robust orchestration frameworks, scalable memory architectures, FinOps optimization and industry-specific accelerators that translate experimentation into measurable outcomes. This study evaluates how providers enable enterprises to operationalize agentic AI responsibly, scale autonomously across distributed environments and drive sustainable competitive advantage.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrant for services: Agentic AI Development and Deployment Services — Large Providers, Agentic AI Development and Deployment Services — Midsize Providers.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and portfolio attractiveness
- Focus on the global market

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

Provider Classifications

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

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

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

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

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Agentic AI Development and Deployment Services — Large Providers

Who Should Read This Section

This report is valuable for large service providers offering agentic AI development and deployment services globally to understand their market position and for enterprises looking to evaluate these providers. The report highlights how leading technology providers build agent studios and orchestration frameworks that enable enterprises to create, manage and scale autonomous AI agents. It shows how these platforms support multi-agent collaboration and lifecycle management, helping organizations deploy agentic AI solutions reliably across complex business environments.

Chief information and compliance officers

Chief information and compliance officers should read this report to understand how providers design and deploy autonomous agents aligned with business goals. The report highlights providers' capabilities in orchestrating multi-agent systems across technology, customer service, finance and compliance. It also shows how these solutions drive autonomous automation and real-time decision-making at enterprise scale.

Chief data and AI officers

Chief data and AI officers should read this report to identify providers that operationalize governance and observability for autonomous agents. The report outlines how providers build control towers, monitoring dashboards and audit trails that track agent decisions and actions, ensuring transparency, explainability and compliance across complex, multi-agent enterprise deployments.

Line-of-business managers

Line-of-business managers should read this report to identify providers that ensure seamless deployment of agentic AI, with a focus on interoperability across cloud, legacy and enterprise systems. The report highlights how providers architect secure, scalable agent infrastructure that maintains data integrity, performance and regulatory alignment across sovereign and hybrid enterprise environments.

Strategy professionals

Strategy professionals should read this report to understand how providers help enterprises translate agentic AI investments into long-term competitive advantage. The report highlights how providers combine orchestration expertise, lifecycle management and hyperscaler partnerships to build resilient, scalable, agentic platforms that are responsive to evolving market dynamics.

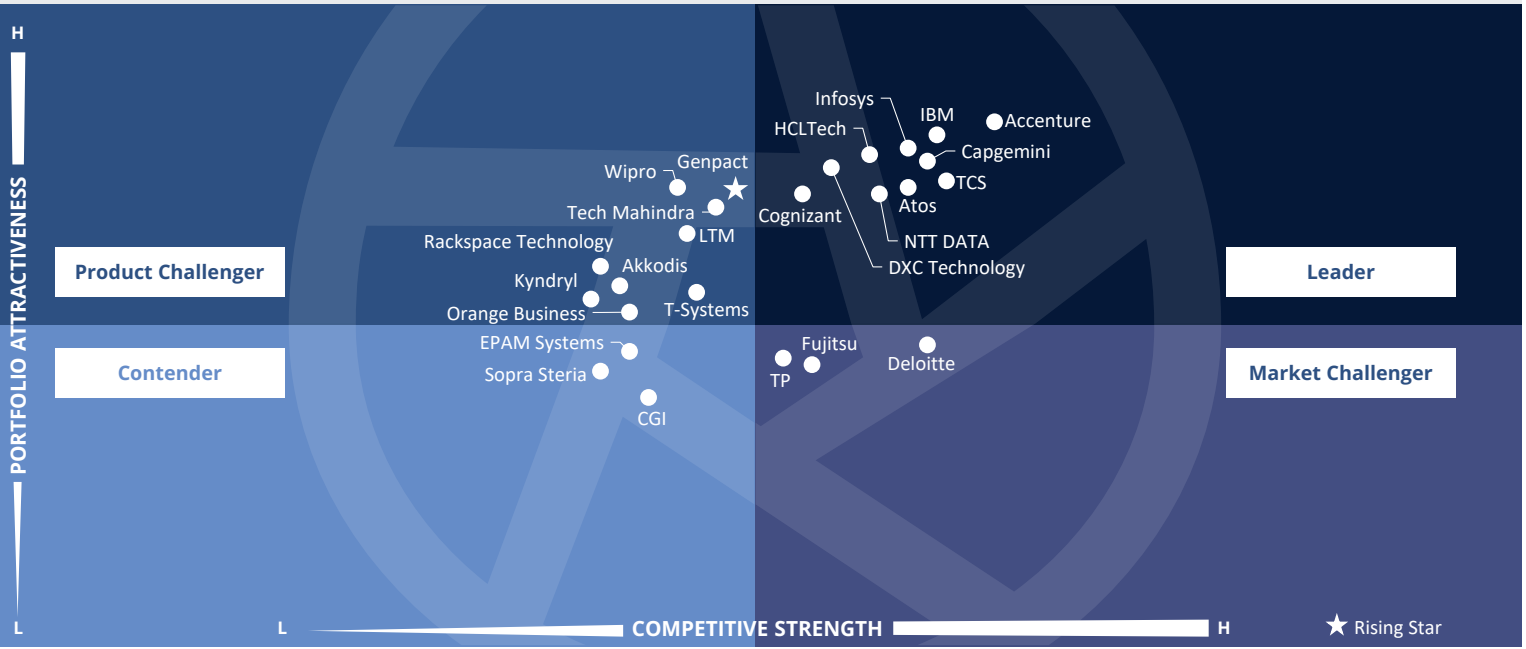
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ISG Provider Lens®

Source: ISG RESEARCH

Agentic AI Services
Agentic AI Development and Deployment Services — Large Providers

Global 2026



This quadrant assesses large providers engineering and operating **Agentic AI** across enterprise workflows, combining orchestration, **system integration**, **controlled execution**, **governance** and human oversight to enable scalable **AI-led operations**.

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Definition

This quadrant evaluates providers of agentic AI solutions that autonomously plan, execute and optimize complex multistep tasks with minimal human intervention. These solutions transcend rule-based automation to enable goal-driven, enterprise-wide orchestration using advanced reasoning, contextual memory and multimodal intelligence.

Agentic AI systems use multi-agent coordination, distributed execution and persistent memory to manage end-to-end processes. They interpret objectives, decompose tasks, invoke enterprise tools and APIs, collaborate with humans or other agents and adapt in real time based on feedback. Providers use long-context processing, retrieval-augmented generation (RAG) frameworks and reinforcement learning to enhance reliability and scalability.

Providers use governance frameworks, guardrails, observability and human-in-the-loop controls to address risk, compliance and cost optimization. By merging autonomy with enterprise-wide oversight, agentic AI enables scalable, outcome-driven transformation.

Eligibility Criteria

1. Demonstrate the ability to **architect and operationalize** enterprise-grade agentic AI solutions
2. Showcase **production-ready deployments** (beyond PoCs) featuring **multi-agent orchestration, tool and API integration, autonomous planning and adaptive workflows**
3. Exhibit **scalable agent architectures** with distributed execution, **long-context memory and secure tool and API integration**
4. Implement **secure tool use and access controls**, including permissions, auditability and safe execution boundaries
5. Embed **human-in-the-loop oversight, approval checkpoints, real-time monitoring, explainability and policy-based controls** for decision-making
6. Establish **robust governance frameworks**, covering bias mitigation, transparency, auditability, security and regulatory compliance
7. Adopt **LLMOps and AgentOps practices**, including model evaluation, guardrails, observability, prompt and version management and FinOps
8. Integrate **multimodal, structured and unstructured data** using RAG, knowledge graphs, state and memory strategy, and contextual memory frameworks
9. Exhibit **industry-specific accelerators, frameworks** and **client case studies** across functions
10. Showcase **partner ecosystem coverage** with hyperscalers, model providers, ISVs and others to drive innovation and scale

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Observations

Large IT service providers note that enterprise demand for agentic AI is centered on bounded, process-specific automation rather than unrestricted autonomous execution. Early adoption is strongest in regulated industries, service-intensive sectors and technology operations, where work can be decomposed into defined tasks and clear decision points. Fully autonomous ownership of an end-to-end business process remains rare.

Enterprises are becoming selective about what counts as genuine agentic capability, prioritizing delegated execution and measurable autonomy over agent branding. Autonomy is increasingly treated as a variable that can be tuned based on risk and confidence. As agents interact directly with enterprise systems of record, including ERP, CRM and broader solution groups, providers are investing in multi-agent architectures, orchestration platforms, reusable agent libraries and open protocols that connect proprietary, hyperscaler and third-party agents within the same estate.

As agents move into production, AgentOps and runtime governance are becoming critical, covering registration, evaluation, observability, lifecycle management and exception handling. Human oversight is shifting from continuous involvement to approval and exception boundaries, while explicit accountability becomes necessary as agents gain operational authority. The market is shifting from individual agents to governed agent ecosystems, where process decomposition, accountability, interoperability and runtime control determine which use cases are ready to scale.

From the 111 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture combines reusable agent frameworks, multi-agent orchestration and industry solutions with governance and observability. Its approach supports agentic workflows across enterprise systems, with an increasing emphasis on controlled, autonomous execution.

Atos

Atos approaches Agentic AI through controlled delegation, combining reusable execution assets with workflow integration, assurance and monitoring. Its model emphasizes bounded operational execution while retaining governance and human oversight.

Capgemini

Capgemini takes a process-led approach through the Digital Global Enterprise Model (D-GEM) and the RAISE 2.0 solution, linking process decomposition to agent engineering and controls. The model provides a structured framework for deploying agents within governed enterprise workflows.

cognizant

Cognizant has built an agentic engineering stack around Agent Foundry, Neuro Multi-Agent Accelerator and Neuro AI Engineering, covering process decomposition, multi-agent orchestration and lifecycle management within enterprise workflows.

DXC

DXC Technology's agentic approach combines Converge and OASIS through orchestration, runtime controls and human oversight. The model supports incremental adoption of AI-led execution while retaining enterprise authority, auditability and accountability.

HCLTech

HCLTech combines AI Force, agentic engineering and autonomous operations platforms to extend AI from assistance into enterprise workflow execution. Its approach emphasizes reusable engineering patterns and controls across business and technology operations.

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IBM's agentic model integrates process decomposition, context engineering, multi-agent orchestration and runtime telemetry. It supports progressive delegation of enterprise tasks while retaining human intervention for sensitive or exception-driven workflow stages.

Infosys combines Topaz Fabric orchestration, reusable skills, enterprise context and runtime governance to support controlled agentic execution. Its approach emphasizes progressive delegation and human oversight rather than unrestricted autonomy.

NTT DATA frames agentic AI across process discovery, workflow redesign, agent deployment and AgentOps. This approach provides a structured engineering path to advance agents from targeted use cases to governed operational execution.

TCS is developing an agentic control plane spanning agent registries, reusable skills, evaluation, drift monitoring and runtime governance. This framework supports the progressive delegation of business tasks while retaining explicit assurance and human control mechanisms.

Genpact (Rising Star) is extending its operations expertise through Agentic Operations, AI Maestro and domain software, combining agents with process execution and controls. Its approach focuses on moving AI from assistance to governed operational workflows.

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Agentic AI Development and Deployment Services — Midsize Providers

Who Should Read This Section

This report is valuable for midsize service providers offering agentic AI development and deployment services globally to understand their market position and for enterprises looking to evaluate these providers. The report highlights how midsize providers enable enterprise adoption of agentic AI through modular, workflow-specific solutions. It showcases how these providers support incremental deployment of autonomous agents, helping organizations experiment, scale and operationalize AI capabilities cost-effectively while simplifying implementation.

Chief information and compliance officers

Chief information and compliance officers should read this report to understand how providers design and deploy autonomous agents aligned with business goals. The report highlights providers' capabilities in orchestrating multi-agent systems across technology, customer service, finance and compliance. It also shows how these solutions drive autonomous automation and real-time decision-making at enterprise scale.

Chief data and AI officers

Chief data and AI officers should read this report to identify providers that operationalize governance and observability for autonomous agents. The report outlines how providers build control towers, monitoring dashboards and audit trails that track agent decisions and actions, ensuring transparency, explainability and compliance across complex, multi-agent enterprise deployments.

Line-of-business managers

Line-of-business managers should read this report to identify providers that ensure seamless deployment of agentic AI, with a focus on interoperability across cloud, legacy and enterprise systems. The report highlights how providers architect secure, scalable agent infrastructure that maintains data integrity, performance and regulatory alignment across sovereign and hybrid enterprise environments.

Strategy professionals

Strategy professionals should read this report to understand how providers help enterprises translate agentic AI investments into long-term competitive advantage. The report outlines how providers combine orchestration expertise, lifecycle management and hyperscaler partnerships to build resilient, scalable, agentic platforms that are responsive to evolving market dynamics.

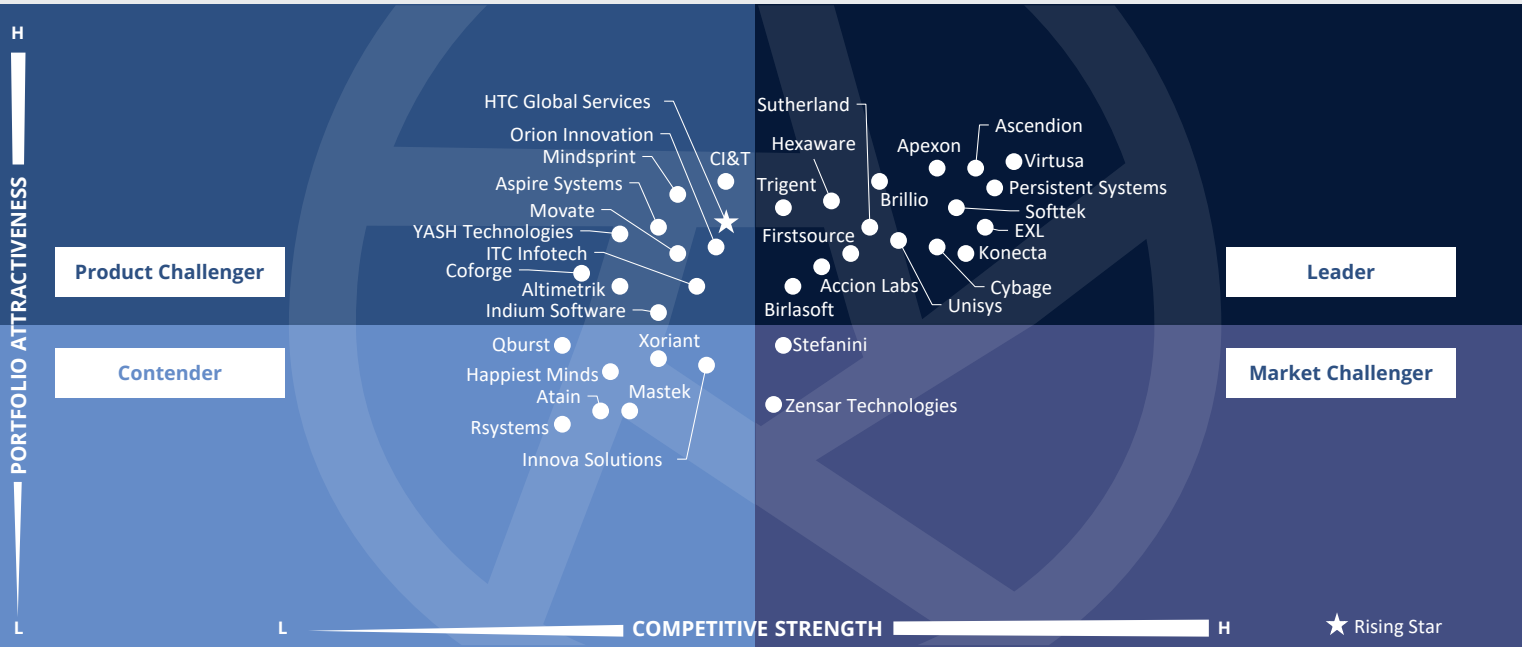
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ISG Provider Lens®

Source: ISG RESEARCH

Agentic AI Services
Agentic AI Development and Deployment Services — Midsize Providers

Global 2026



This quadrant assesses service providers that enable **Agentic AI adoption** through **strategic frameworks**, emphasizing **trust, human-AI collaboration**, and **governance** while delivering measurable value across **enterprise workflow.**

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Definition

This quadrant evaluates providers of agentic AI solutions that autonomously plan, execute and optimize complex multistep tasks with minimal human intervention. These solutions transcend rule-based automation to enable goal-driven, enterprise-wide orchestration using advanced reasoning, contextual memory and multimodal intelligence.

Agentic AI systems use multi-agent coordination, distributed execution and persistent memory to manage end-to-end processes. They interpret objectives, decompose tasks, invoke enterprise tools and APIs, collaborate with humans or other agents and adapt in real time based on feedback. Providers use long-context processing, retrieval-augmented generation (RAG) frameworks and reinforcement learning to enhance reliability and scalability.

Providers use governance frameworks, guardrails, observability and human-in-the-loop controls to address risk, compliance and cost optimization. By merging autonomy with enterprise-wide oversight, agentic AI enables scalable, outcome-driven transformation.

Eligibility Criteria

1. Demonstrate the ability to **architect and operationalize** enterprise-grade agentic AI solutions
2. Showcase **production-ready deployments** (beyond PoCs) featuring **multi-agent orchestration, tool and API integration, autonomous planning and adaptive workflows**
3. Exhibit **scalable agent architectures** with distributed execution, **long-context memory and secure tool and API integration**
4. Implement **secure tool use and access controls**, including permissions, auditability and safe execution boundaries
5. Embed **human-in-the-loop oversight, approval checkpoints, real-time monitoring, explainability and policy-based controls** for decision-making
6. Establish **robust governance frameworks**, covering bias mitigation, transparency, auditability, security and regulatory compliance
7. Adopt **LLMOps and AgentOps practices,** including model evaluation, guardrails, observability, prompt and version management and FinOps
8. Integrate **multimodal, structured and unstructured data** using RAG, knowledge graphs, state and memory strategy, and contextual memory frameworks
9. Exhibit **industry-specific accelerators, frameworks** and **client case studies** across functions
10. Showcase **partner ecosystem coverage** with hyperscalers, model providers, ISVs and others to drive innovation and scale

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Observations

Midsize providers are advancing agentic AI primarily through focused, bounded workflow execution rather than broad autonomous enterprise operation. Implementations increasingly show agents interpreting context, coordinating tasks and performing actions within defined processes, creating opportunities to improve cycle times, responsiveness and the human intensity of operational work without requiring unrestricted autonomy.

Midsize providers' implementation strengths are particularly relevant where workflows have clear boundaries, machine-operable systems, observable outcomes and manageable exceptions. Greater agency emerges when agents move beyond recommendation toward state-changing actions such as routing, updating, triggering, communicating and remediating, while deterministic controls and human validation remain important. Thus, human involvement evolves toward approvals, exception handling and supervision as AI assumes more execution responsibility.

Midsize differentiation is consequently moving beyond building agents toward engineering repeatable delegation within well-defined workflows. Although reusable agents, orchestration frameworks and factories can accelerate development, stronger evidence comes from reusable integration, execution, control and exception patterns that reduce reinvention across implementations. Focused engineering, domain knowledge and delivery agility can allow midsize providers to industrialize these bounded agency patterns effectively, making precision and repeatability of workflow execution more relevant competitive signals than the number of agents or claims of maximum autonomy.

From the 111 companies assessed for this study, 36 qualified for this quadrant, with 16 being Leaders and one Rising Star.

Accion Labs

Accion Labs is advancing SPEX as its production agentic foundation, combining business capabilities, contextual grounding, enterprise integration and runtime governance to support tightly controlled, enterprise-scale business process delegation.

Apexon

Apexon has advanced its agentic portfolio from assisted interactions toward bounded workflow execution, supported by AgentRise governance, observability and reusable orchestration capabilities.

Ascendion

Ascendion has enhanced AAVA with agent governance, efficacy monitoring, reusable workflows and multi-tool integration, reinforcing its shift toward controlled, production-oriented agentic AI execution.

birlasoft

Birlasoft is advancing enterprise agent engineering through Cogito, MeshX and reusable orchestration patterns, establishing production-oriented foundations for governed workflow execution, observability, operational accountability and scalable deployment.

Brillio

Brillio extends ADAM as an enterprise agentic AI accelerator, integrating industrialized orchestration, domain-context engineering, multidimensional control tower governance, observability and AI-native delivery capabilities for enterprise-grade workflows.

CYBAGE

Cybage has established ARGO as a proprietary agentic engineering foundation, combining enterprise tool orchestration, runtime governance, human authorization controls and multicloud deployment for production-oriented agent systems.

EXL

EXL is building its agentic factory around reusable domain skills, hooks, guardrails, context structures and runtime controls, creating a common engineering foundation for governed AI execution across operational workflows and enterprise technology stacks.

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Firstsource has made agentic execution a core element of Kairos, pairing Agentic AI Studio with domain playbooks, contextual intelligence and runtime controls as it shifts from AI-assisted operations toward increasingly coordinated and governed digital work.

Hexaware approaches agentic AI as a governed engineering discipline, combining workflow construction, reusable agents, testing, observability and multiplatform integration to move agent-based systems from experimentation into controlled production.

Konecta

Konecta has established Kolibri as a control layer for governed agent operations, adding agent-to-agent integration, runtime evaluations, traceability and FinOps to its orchestration model as the company advances its broader agentic enterprise strategy.

Persistent Systems has expanded GenAI Hub with an agent tool catalog and no-code Agent Builder while deepening agentic partnerships with Google Cloud, AWS, Salesforce and UiPath, strengthening its platform and ecosystem foundation for governed enterprise agent deployment.

Softtek

Softtek has formalized agentic AI around autonomy design, multi-agent engineering, industry solutions and AgentOps, with SALMA and its reusable agent library providing a proprietary foundation for governed workflow execution across enterprise operations.

Sutherland has organized its agentic direction around dedicated hyperscaler practices, industry-specific agent components and an emerging agentic operations control tower, linking agent engineering with workforce redesign and runtime operations across its delivery model.

Trigent

Trigent is extending its engineering model toward agent-oriented delivery with governed orchestration, AI-led development pods and a planned proprietary Asura layer, building on ArkOS while retaining human control at consequential workflow boundaries.

Unisys is extending the Unisys Intelligence Accelerator toward agent-driven managed operations, combining reusable agent patterns, enterprise context, observability and governed execution across infrastructure, applications and service workflows at scale.

Virtusa has expanded Helio toward governed agent execution with agent harnesses, testing agents, runtime controls and delivery roles, creating a structured engineering foundation for moving enterprise agents from bounded assistance to controlled operational action.

HTC Global Services (Rising Star) has developed Agent Hub and AgentTK as reusable orchestration assets within MAiGE, bringing planners, routing, guardrails, evaluation and tool connectivity into a common engineering foundation for repeatable, governed agent deployment.

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Leader

"Unisys operationalizes agentic AI as governed digital labor within enterprise technology services, combining scoped agent responsibilities, orchestration, human controls and systems integration to move AI from recommendations toward governed action."

Gowtham Kumar Sampath

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. Unisys develops agentic AI primarily for managed technology operations, application services and service delivery. Its portfolio combines the Unisys Intelligence Accelerator, and Service Experience Accelerator with workflow and observability capabilities. Its engineering approach emphasizes scoped agent responsibilities, structured handoffs, human oversight and integration with systems of record. Unisys' agentic identity is grounded in governed operational execution.

Strengths

Scoped agent engineering: Unisys structures agents around discrete operational responsibilities, with defined handoffs between analysis, validation, reporting and action. This decomposition keeps tasks narrow enough to govern and observe while preserving coordinated workflow execution. The pattern spans root cause analysis, service management and application management, defining Unisys' engineering model beyond broad autonomous worker claims.

Operations-native orchestration: Unisys connects agentic capabilities with ITSM, observability, infrastructure and application management systems used to run enterprise environments. Agents analyze operational context, recommend or execute bounded actions and feed results into service workflows. This integration places agency within managed operations and gives Unisys a practical path from AI-assisted diagnosis toward controlled action across enterprise systems.

Human-digital labor model: Unisys combines agent execution with human expertise as an explicit delivery model. Agents handle bounded analysis, remediation or workflow steps, while specialists retain authority where risk, ambiguity or production changes require judgment. Internal experimentation and workforce fluency programs complement the model, preparing teams to supervise and refine agent-driven work without treating autonomy as a substitute for operational expertise.

Caution

Unisys' agentic portfolio is concentrated in IT, application and service operations, with less emphasis on autonomous execution across finance, supply chain, customer operations and other business functions. Commercial packaging for autonomous business outcomes is correspondingly less central to its market identity.

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Appendix

Methodology & Team

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of September 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Agentic AI Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Assistant Director and Principal Analyst

Gowtham Sampath serves as an Assistant Director and Principal Analyst at ISG Research, where he leads research on Data and Artificial Intelligence-driven transformation and the evolution of intelligence ecosystems. He is accountable for ISG Provider Lens® quadrant reports in the Data and AI domain, including Advanced Analytics and AI Services, Generative AI Services and Agentic AI Services. He also contributes to niche AI ecosystem studies covering platform-centric providers such as Palantir, Databricks and other AI infrastructure enablers.

Gowtham's research focuses on tracking AI market shifts, provider strategy evolution and the challenges of operationalizing intelligent systems. His role includes supporting enterprise-facing advisors with research insights on AI adoption, scalability and innovation maturity across industries.



Lead Author

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Sushree Acharya is a Senior Analyst with ISG Research, responsible for authoring ISG Provider Lens® reports focused on Data & Analytics and AI. With nearly 9 years of experience across research, consulting and advisory roles, she specializes in market intelligence, hyperscaler and provider ecosystems, competitive positioning and go-to-market strategy within the technology services landscape.

Her work focuses on analyzing market evolution, identifying growth opportunities, competitive intelligence and evaluating emerging trends. She contributes to thought leadership, provider assessments, market reports and strategic insights that help enterprises and service providers make informed business and investment decisions. Her experience also spans cloud and infrastructure services, as well as broader technology ecosystems.

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Study Sponsor



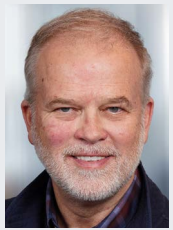
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Chief Business Leader

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

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

IPL Product Owner



Jan Erik Aase

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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

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