ISG Provider Lens®

# Agentic AI Services — Large and Midsize

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




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Accionlabs

**QUADRANT REPORT | OCTOBER 2026 | GLOBAL**

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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 | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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

**Page 2 of 6**

| | Agentic AI Development and Deployment Services — Large | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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 | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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

**Page 4 of 6**

| | Agentic AI Development and Deployment Services — Large | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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

**Page 5 of 6**

| | Agentic AI Development and Deployment Services — Large | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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 | Agentic AI Development and Deployment Services — Midsize |
|---|---|---|
| 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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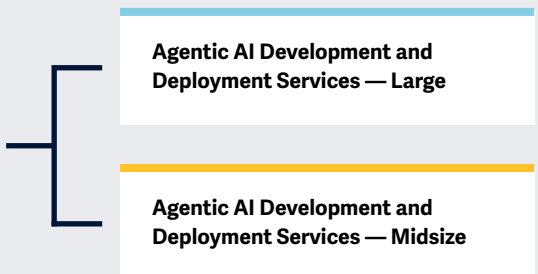
The study analyzes market trends, provider capabilities and competitive dynamics shaping **agentic AI and autonomous systems**' evolution.




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, Agentic AI Development and Deployment Services — Midsize.

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

## 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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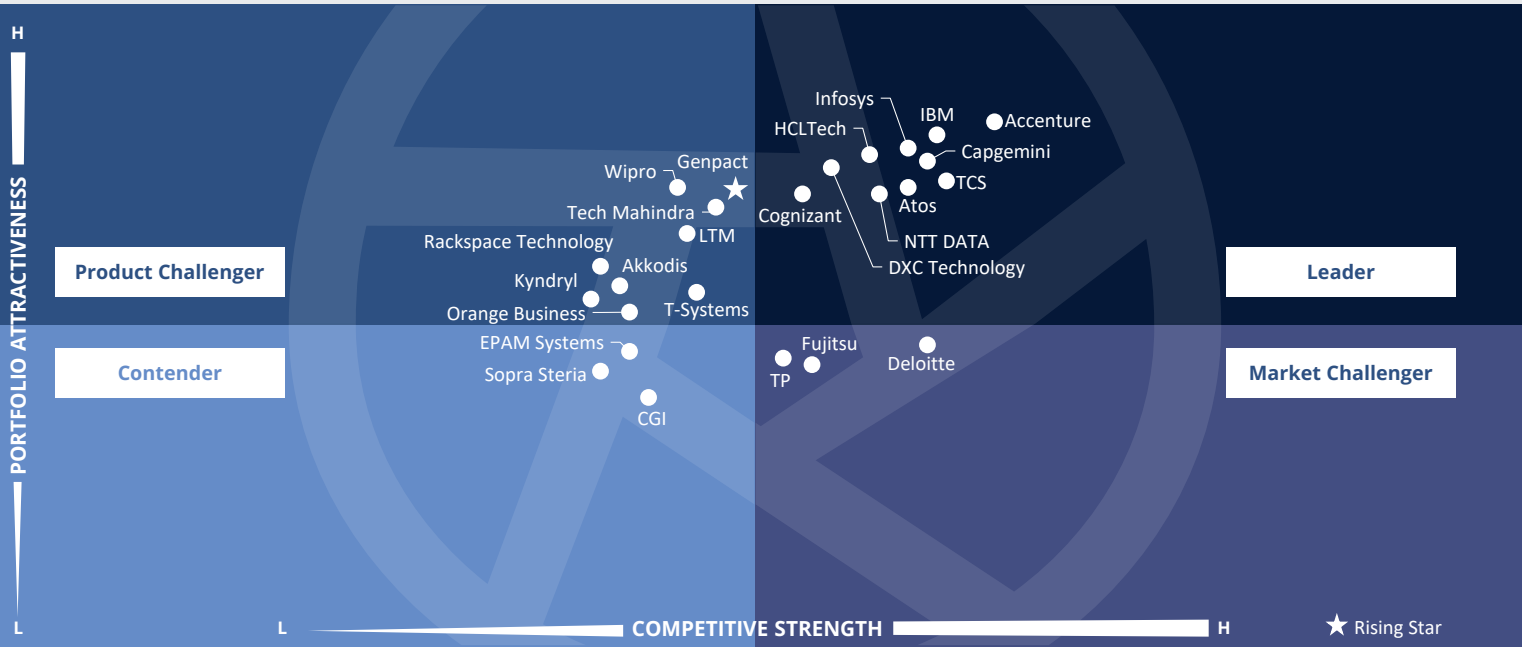
ISG Provider Lens®

Source: ISG RESEARCH

Agentic AI Services

Global 2026

Agentic AI Development and Deployment Services — Large




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**.

*Gowtham Kumar Sampath and Sushree Acharya*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## Agentic AI Development and Deployment Services — Large

**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

## 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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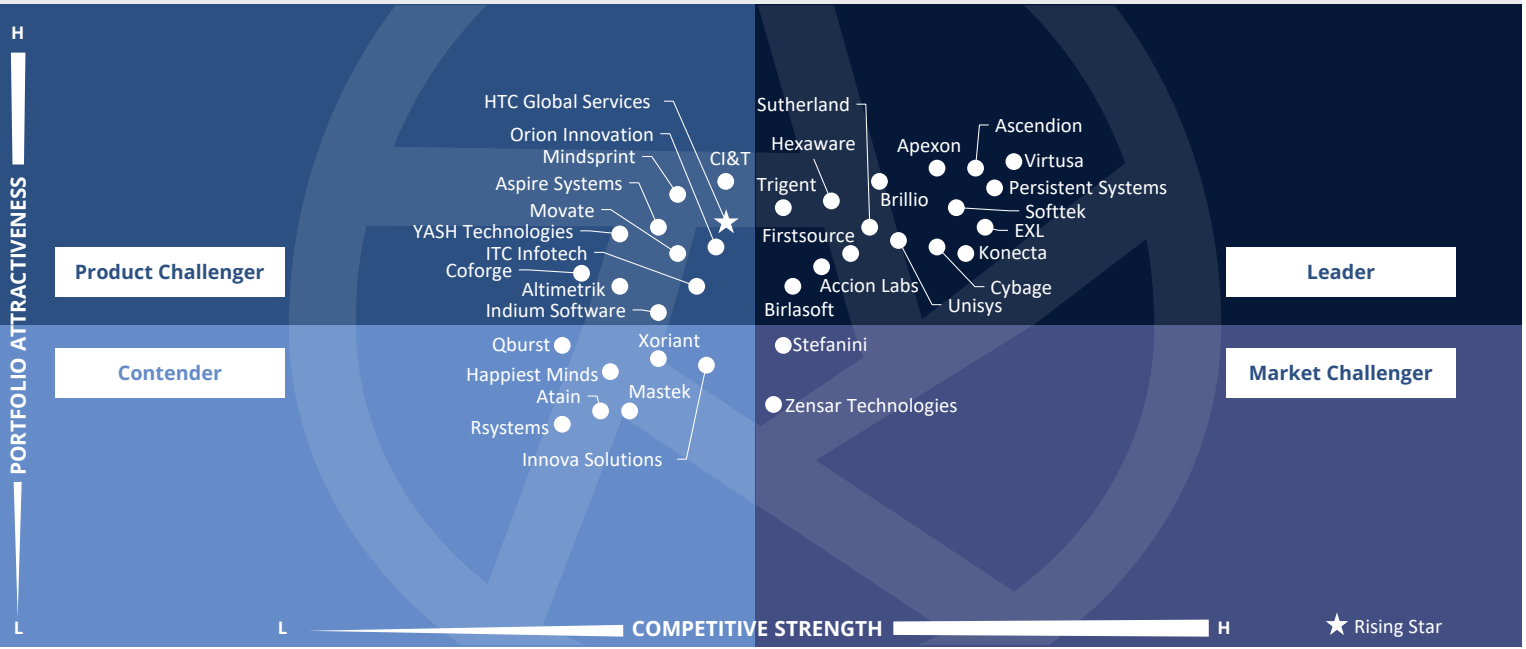
Source: ISG RESEARCH

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

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.**

*Gowtham Kumar sampath*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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.

Accionlabs

**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

"Accion Labs brings agentic AI into production with a disciplined engineering model that combines contextual grounding, governed orchestration and enterprise integration, moving workflows from human-led activity toward controlled AI execution."

*Gowtham Kumar Sampath*

# Accion Labs

**Overview**

Accion Labs is headquartered in Pennsylvania, U.S., and operates in 12 countries. It has more than 5,000 employees across 23 global offices. Accion Labs is an engineering-led provider of agentic AI development and deployment services, with SPEX at the center of its proprietary portfolio. Its offerings include agent orchestration, enterprise knowledge, systems integration, runtime governance and production operations, complemented by ECL and KnowledgeMesh. Accion Labs uses a model- and cloud-agnostic delivery model across cloud, hybrid and sovereign architectures, with investments focused on deeper agent delegation, multimodal workflows and operational control.

**Strengths**

**Governed agent orchestration:** Accion Labs delivers SPEX as a reusable orchestration foundation that combines business-oriented agent skills, task planning, dynamic replanning and persistent context. The framework supports the composition of coordinated workflows while retaining explicit process and governance boundaries, enabling enterprises to delegate meaningful execution without depending on unconstrained model autonomy.

**Runtime control architecture:** Accion Labs embeds runtime governance into agent execution through policy enforcement, tool restrictions, confidence thresholds, auditability and human escalation. Its tiered autonomy approach enables business responsibility to be calibrated based on use case risk rather than universal autonomy. This provides enterprises with a control model for expanding agent execution while maintaining defined boundaries for consequential actions.

**Context-rich agent engineering:** Accion Labs grounds agent execution in enterprise context using ECL, the Semantic Knowledge Graph, graph architectures and enterprise connectors. These connect agents with persistent knowledge, cross-step context and operational systems. Accion treats enterprise context and state as structural components of agent execution, particularly where actions depend on evolving business information and prior workflow activity

**Caution**

Accion Labs' portfolio remains weighted toward governed workflow execution, with full business ownership playing a narrower role in its overall agentic identity. Its industry coverage is broad, but deeper business-agency specialization is concentrated in selected process patterns.


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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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## Gowtham Kumar Sampath

**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*

## Sushree Acharya

**Senior Analyst**

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*



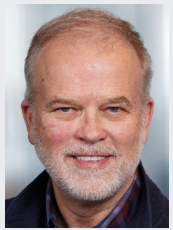
## Namratha Darshan

**Chief Business Leader**

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

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

*IPL Product Owner*



## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens®**

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

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.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**OCTOBER, 2026**

# REPORT: AGENTIC AI SERVICES — LARGE AND MIDSIZE

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