ISG Provider Lens®

Generative AI Services — Specialists

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



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VERSION 1

QUADRANT REPORT | OCTOBER 2026 | GLOBAL

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Report Authors: Gowtham Kumar Sampath and Saravanan MS

Specialists unlock GenAI value by turning enterprise knowledge into contextual and actionable intelligence

The ISG Provider Lens® Generative AI Services 2026 study evaluates specialist AI providers that deliver consulting, development, deployment and continuous optimization services globally. The market is entering an execution-oriented phase, in which AI-ready foundations, contextualized proprietary knowledge, workflow-integrated GenAI and measurable business outcomes are becoming key drivers of adoption. To meet these market demands, specialist AI providers are adapting their architectures, delivery models and technology partnerships as GenAI shifts from experimentation to scaled, enterprise-grade use.

Market Context: Key Drivers Accelerating Enterprise Adoption of GenAI Services

In 2026, a convergence of productivity pressures, expanding data volumes, computational advances and governance mandates is reshaping the GenAI landscape. These structural forces are widening GenAI applicability while raising the importance of contextual accuracy, technological adaptability and operational efficiency.

Elevated productivity pressures are accelerating the restructuring of knowledge-intensive work: The ISG Market Lens™ AI Value 2026 study indicates enterprise expectations for AI remain centered on workforce productivity, with operational agility and faster response times gaining priority. This reflects a growing recognition of task automation, workflow execution and data analysis as core enterprise objectives for operational improvement. Software development, knowledge discovery and information retrieval continue to attract sustained interest, indicating where GenAI already delivers a compelling value proposition.

Enterprise knowledge is becoming central to AI-led transformation: The growing emphasis on enterprise-specific knowledge is accelerating the broader adoption of GenAI across knowledge-intensive activities. Proprietary content, institutional expertise,

GenAI **evolves beyond assistance** toward reliable **decision-centric systems** embedded within business workflows.

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business rules and accumulated organizational intelligence are emerging as critical inputs for AI systems. This creates stronger demand for capabilities that capture, structure and operationalize enterprise knowledge and increases market focus on knowledge-centric AI architectures and services.

AI value is increasingly determined by contextual relevance rather than model capability alone: As foundation models become more capable and increasingly commoditized, standalone model performance is a less decisive determinant of AI value. Market emphasis is shifting toward contextualization on how effectively AI can interpret business-specific information, processes, objectives and constraints. That shift raises the importance of retrieval, semantic understanding, knowledge integration and contextual grounding.

Enterprise Priorities: Operationalizing Intelligence Through Trusted Data and Knowledge Foundations

Enterprises are directing GenAI investments toward strengthening the foundations required to embed intelligence across business processes and workflows. Their priorities increasingly span data and knowledge readiness, production scalability, portfolio-level transformation, architectural flexibility and workflow integration, reflecting the interdependencies that shape AI initiatives.

ISG Research™ identifies seven critical priorities shaping how enterprises operationalize GenAI and embed intelligence into their systems and operations.

1. **Establishing governed, AI-ready data foundations:** Enterprises are recognizing that GenAI performance and scale are constrained by the quality and accessibility of underlying data, prompting the modernization of data foundations, improvements in data quality and lineage and the unlocking of unstructured enterprise content. They need consistent mechanisms to discover, classify and govern structured and unstructured information, establishing reliable foundations that support accuracy, traceability and repeatable performance. Rather than treating data preparation as a preliminary technology exercise, enterprises increasingly need to establish data foundations as a key determinant of AI initiatives beyond controlled pilots.
2. **Managing proprietary knowledge and content provenance:** Enterprise value from GenAI depends heavily on the system's ability to reason over proprietary knowledge and understand business meaning and relationships rather than generic information. With substantial proprietary knowledge distributed across documents, databases, collaboration platforms and applications, enterprises often face inconsistent terminology, semantics and contextual relationships. This drives demand for capabilities that identify authoritative information, map relationships and deliver responses grounded in the business context to support critical decisions, process integration and trust in AI-generated outputs.
3. **Scaling pilots to secure, enterprise-grade production:** The central enterprise challenge is operationalizing GenAI reliably at scale. Enterprises therefore prioritize security, governance, integration, observability and lifecycle management alongside model capability. They seek GenAI embedded in core processes and workforce activities rather than limited to standalone assistants. Investment decisions are placing greater weight on reliability, integration readiness, adoption and measurable improvement in business or employee outcomes.
4. **Advancing enterprise transformation beyond individual domains:** As adoption matures, enterprises are shifting from single use cases to portfolios of interconnected AI initiatives across functions, domains and workflows. The objective is to use GenAI as a transformation layer to reshape operating models and workflows, improve workforce productivity and support cross-functional decision-making.
5. **Maintaining model optionality for performance, cost and sovereignty requirements:** Enterprises must balance model performance against inference cost, latency, data sensitivity, sovereignty and workload requirements by combining foundation models, SLMs, proprietary models and open-source models. They seek to capitalize on model innovation

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without continually rebuilding applications or becoming excessively dependent on a particular model, platform or technology stack.

6. **Connecting GenAI intelligence with enterprise systems and workflows:** As enterprises gain experience with conversational interfaces, the limitation of GenAI operating outside core enterprise workflows is more evident. Enterprises recognize that they need AI systems that can retrieve context, interact with applications, initiate actions and participate directly in workflows so that users can translate intelligence into operational outcomes.
7. **Establishing trusted governance, risk and responsible AI foundations:** With rising data volumes, increased model utilization and sustained adoption of AI insights, enterprises require unified governance controls across data, models, applications, platforms and ecosystems. These controls must support security, privacy, explainability, regulatory compliance, traceability and human oversight without impeding responsible adoption and trust.

Provider Dynamics: Building Differentiated Capabilities Across the Enterprise Value Chain

Specialist AI providers are shaping their GenAI propositions by combining deep industry and domain expertise with strong AI capabilities and targeted problem-solving to translate complex business challenges into actionable enterprise solutions.

I. Modular architectures are emerging for enterprise AI

Specialist AI providers are moving away from tightly coupled, single-stack approaches toward modular architectures that allow enterprises to combine models, data, applications and deployment environments. This modularity emphasizes interoperability, model routing, reusable components and deployment flexibility, allowing individual components to evolve without rebuilding the entire environment.

II. Production-oriented solutioning connects strategic advisory with domain and AI engineering expertise

Specialist AI providers are strengthening their strategy-to-execution proposition by incorporating architecture, data readiness, security, governance and integration early in solution design. This translates business problems into targeted AI architectures and solutions, leveraging multidisciplinary teams that address data, models, integration, security and workflow requirements throughout implementation. It helps reduce the disconnect between conceptual GenAI roadmaps and production realities, establish practical implementation pathways, identify constraints early and align solutions with enterprise sworkflows.

III. Data discovery expands to semantic discovery

As enterprise AI becomes more context-dependent, specialist AI providers are extending beyond traditional data engineering and integration to include source discovery and semantic mapping. This includes identifying relevant structured and unstructured sources, understanding relationships between data assets and determining how data should be contextualized for downstream applications. With growing recognition that AI performance heavily depends on both quality and context, these capabilities are foundational for scaling retrieval-augmented generation (RAG), enterprise search and knowledge discovery solutions.

IV. Institutionalizing enterprise knowledge foundations for context-aware AI

Specialist AI providers are investing in ontologies, knowledge graphs and context graphs to create structured representations of enterprise knowledge, relationships and provenance. These assets form a stable contextual layer across changing models and applications, establishing reusable knowledge foundations that support multiple assistants, analytical systems and decision-oriented applications and bridging enterprise data with AI solutioning.

V. Moving from productivity assistants to decision-centric AI systems

Specialist AI providers are evolving their GenAI propositions from specific task-oriented assistance to decision-centric systems that augment complex decision-making. These solutions combine reasoning, analytical assessment and scenario evaluation to help

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business users interpret situations, identify alternatives and determine next-best actions.

VI. Embedding AI governance, risk and compliance into delivery

Specialist AI providers are embedding governance across the AI lifecycle, including model risk, security, responsible AI, compliance and operational controls. With increased consumption and adoption of GenAI solutions, organizations are integrating governance and domain-specific control patterns into the architecture and strengthening observability and evaluation mechanisms to identify deviations in model performance and compliance issues. The specialist AI providers are also establishing consistent guardrails, traceability and accountability across the lifecycle.

VII. Scaling via AI-native service delivery

Specialist AI providers are investing in innovation labs, AI factories and domain-specific platforms to support rapid experimentation and the industrialization of capabilities, helping enterprises move from pilots to scaled adoption. They have developed proprietary IP assets, including reusable accelerators for SDLC, data modernization and industry- or function-specific use cases to accelerate delivery, consistency and scalability across engagements.

VIII. Partnership strategies are shifting toward co-development

Given the rapid evolution of the GenAI technology stack, technology partnerships are not just essential but critical for differentiation toward deeper specialization across selected verticals and technology stacks. Specialist AI providers are pursuing joint development and co-innovation initiatives to build depth around specific models, platforms and enterprise environments. Closer collaboration with partners gives specialist AI providers early access to emerging models and platforms, strengthens engineering expertise, supports co-creation of reusable IP and accelerates solution development.

Outlook

The ability to access enterprise knowledge, understand business context and act within governed workflows will become more consequential than incremental differences in standalone model capabilities.

ISG foresees three transformative developments reshaping the GenAI services landscape over the next 18–24 months:

- **Enterprise knowledge platforms will become strategic AI infrastructure:** Enterprises will increase investments in reusable knowledge foundations that connect data, semantics and contextual relationships, recognizing that contextual decision intelligence is the core for reliable business outcomes.
- **Progression from GenAI to agentic ecosystem:** The next phase of GenAI solutions will extend beyond generating and synthesizing content toward agentic ecosystems that coordinate specialized agents across applications, data and workflows. Enterprises should prioritize use cases where autonomous execution creates measurable value in low-risk environments, while establishing orchestration, observability, policy enforcement and human-in-the-loop controls.
- **Domain-specific SLMs will gain importance alongside frontier models:** Specialist AI providers should develop domain-specific SLMs tailored to specialized terminology, processes and regulatory requirements. These models will complement frontier models for repeatable workloads that require precision, lower latency, enhanced privacy or greater deployment control.

GenAI is progressing from experimentation toward an enterprise capability built around context, adaptability and execution. Enterprises that establish robust semantic foundations, adaptable architectures and governed access while preserving model flexibility will be better positioned to scale adoption, manage complexity and sustain measurable business outcomes.

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Provider Positioning

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	Strategy and Consulting Services — Specialists Providers	Development and Deployment Services — Specialists Providers
66degrees	Product Challenger	Product Challenger
Aays	Product Challenger	Product Challenger
Alexander Thamm	Product Challenger	Product Challenger
Analytics8	Contender	Contender
C5i	Product Challenger	Product Challenger
Factspan	Product Challenger	Product Challenger
Fractal Analytics	Leader	Leader
InData Labs	Contender	Contender
Innover Digital	Contender	Product Challenger

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Provider Positioning

Page 2 of 3

	Strategy and Consulting Services — Specialists Providers	Development and Deployment Services — Specialists Providers
Lingaro	Leader	Leader
Mu Sigma	Product Challenger	Product Challenger
Narwal.ai	Product Challenger	Product Challenger
Network Science	Leader	Leader
N-iX	Product Challenger	Product Challenger
Quantiphi	Leader	Leader
Sagility	Product Challenger	Product Challenger
Sigmoid	Leader	Leader
Straive	Leader	Leader

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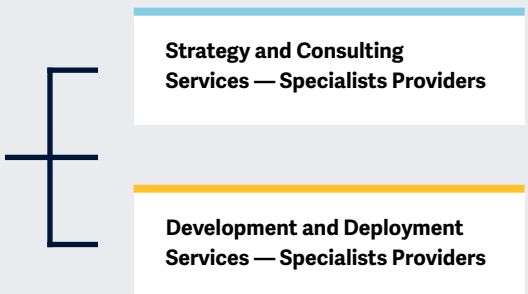
Provider Positioning

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	Strategy and Consulting Services — Specialists Providers	Development and Deployment Services — Specialists Providers
Tiger Analytics	Leader	Leader
Tredence	Leader	Leader
UAI Labs	Contender	Contender
Version 1	Leader	Leader

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



Simplified Illustration Source: ISG 2026

Definition

GenAI is redefining the enterprise technology landscape in 2026, evolving from experimentation to scaled, value-driven transformation. It now serves as a strategic enabler of intelligent enterprises, reshaping operations and accelerating innovation cycles.

Today, GenAI powers not only text, code, images and video but also autonomous workflows, decision intelligence and hyperpersonalized customer experiences across industries.

Key trends shaping GenAI investments include:

- As organizations move beyond pilots, advisory services play a critical role in defining GenAI roadmaps, establishing governance models and building scalable operating frameworks to accelerate ROI and enterprise-wide adoption.
- LLMs are advancing in reasoning, contextual awareness and multimodal capabilities, while smaller, domain-specific models gain traction for cost-efficient, high-precision applications. Fine-tuning and retrieval-augmented generation (RAG) enable secure, data-driven customization.
- As deployments scale, LLMOps frameworks manage model lifecycle, versioning and security, ensuring traceability. Continuous evaluation, prompt refinement and bias detection help sustain accuracy and business alignment.
- Autonomous AI agents are increasingly capable of executing multi-step tasks, orchestrating workflows across enterprise applications and augmenting decision-making.
- Enterprises are embedding transparency, explainability and risk management into GenAI strategies to safeguard trust and ensure sustainable adoption.

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

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services: Strategy and Consulting Services – Specialists Providers, Development and Deployment Services – Specialists 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)
- 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.
- **Mid-size 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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Strategy and Consulting Services — Specialists Providers

Who Should Read This Section

This report is valuable for specialist service providers offering generative AI (GenAI) strategy and consulting services globally to understand their market position and for enterprises looking to evaluate these providers. The report highlights how specialist providers apply domain-led expertise to address business challenges through targeted Gen AI strategies. It outlines how their industry knowledge enables tailored solutions that account for operational complexities, regulatory needs and sector-specific requirements.

Chief information and compliance officers

Should read this report to identify providers that embed responsible AI frameworks, model explainability and audit trails into enterprise-wide GenAI strategies. It highlights how providers align governance with evolving regulations and mitigate risks of data leakage, model inversion and unauthorized access across hybrid and sovereign deployments.

Chief data and AI officers

Should read this report to identify providers that design enterprise-scale data governance and evaluation strategies for GenAI. The report highlights how providers enable robust AI governance, operationalize GenAI across the enterprise, optimize model performance and cost, and support secure, flexible deployment options.

Line-of-business managers

Should read this report to understand how providers translate GenAI strategy into measurable business outcomes such as productivity, personalization and customer engagement. The report highlights how providers help business leaders build repeatable, ROI-driven roadmaps that move initiatives beyond pilots into scaled, orchestrated enterprise deployments.

Strategy professionals

Should read this report to understand how providers help enterprises translate GenAI investments into long-term competitive advantage. The report highlights how providers combine domain expertise, GenAI advisory and orchestration frameworks to build scalable, resilient organizations aligned with evolving market and regulatory dynamics.

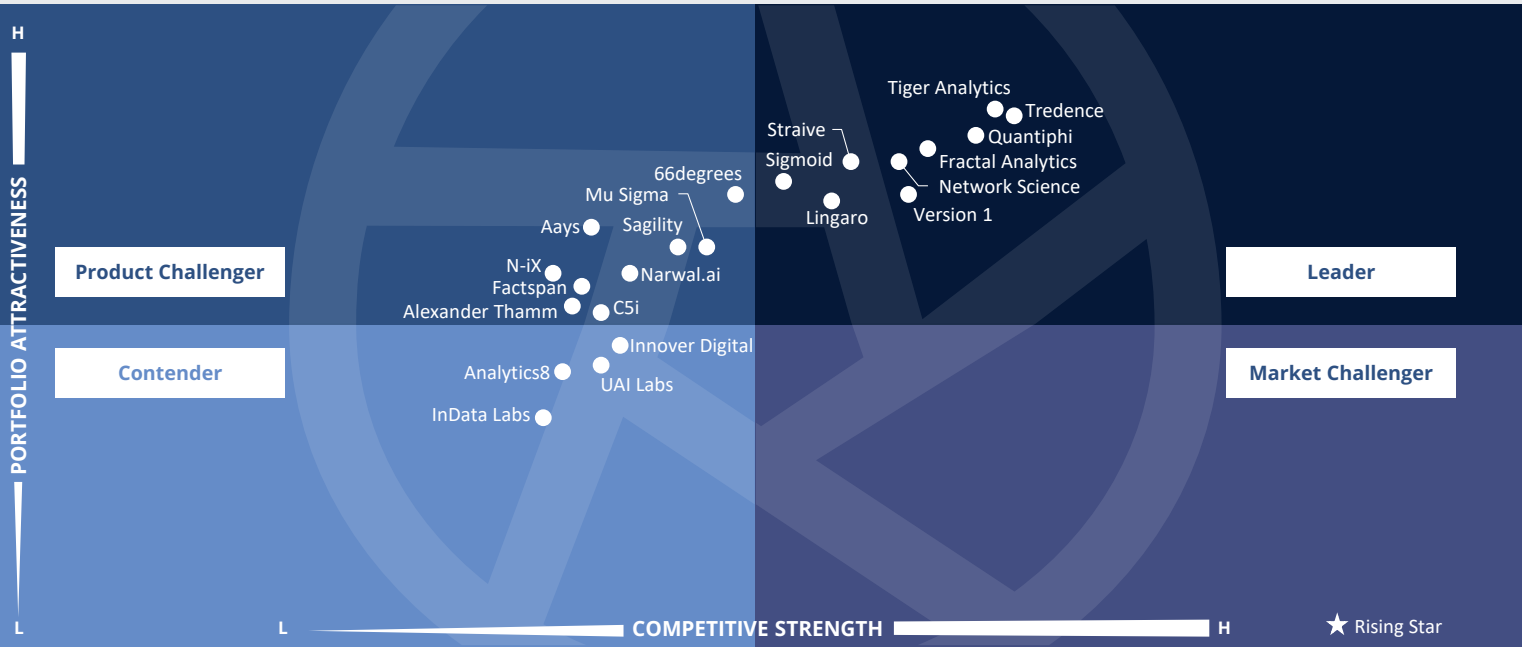
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ISG Provider Lens®

Source: ISG RESEARCH

Generative AI Services — Specialists
Strategy and Consulting Services — Specialists Providers

Global 2026



This quadrant assesses specialist providers delivering **strategy and consulting services** to help enterprises explore opportunities, **develop strategies, ensure governance** and create **solutions aligned with business objectives** to achieve optimal results.

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Definition

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

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

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

Eligibility Criteria

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

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Observations

Specialist providers are carving out a distinct position in the GenAI market by combining advisory strength, AI innovation, context engineering, security and governance through a forward deployed engineering (FDE) model for business transformation. They are increasingly emphasizing the identification of high-value opportunities by leveraging industry expertise, regulatory knowledge and operational insight. Their expertise helps in defining risk frameworks and execution roadmaps that balance operating model redesign and ROI with accountability.

A defining characteristic of specialists is their ability to anchor AI strategy in industry-specific nuances, blending advisory skills, domain expertise and adoption planning to help enterprises prioritize initiatives and establish governance mechanisms. Specialists are also leveraging their proximity to enterprise clients to develop pragmatic roadmaps that align AI initiatives with industry-specific business objectives. Providers are also building industry-specific playbooks, reusable assessment frameworks and adoption programs to improve repeatability and shorten strategy-to-execution timelines.

With the industry shifting toward outcome-based transformation models, specialists are placing greater emphasis on accelerating enterprise adoption, governance maturity and sustained business value realization.

Some of the key market trends include:

- Industry-specific AI value realization and prioritization frameworks
- Integration of governance, risk and compliance considerations into GenAI strategy engagements
- Convergence of strategy, process, workforce transformation and change management

From the 111 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.

fractal

Fractal Analytics' sustained proprietary AI research, enterprise-grade Cogentiq platform, responsible AI engineering and workforce-transformation investments reinforce its strategy of connecting executive advisory with enterprise-architecture foundational systems.

lingaro

Lingaro's data-centric consulting approach enables enterprises to align GenAI strategies with data readiness, governance requirements and business objectives, ensuring sustainable adoption supported by frameworks and structured execution planning.

Network Science

Network Science combines strategic advisory, executive enablement, governance frameworks, and implementation planning to help enterprises establish long-term foundations for GenAI adoption and operationalize AI-driven transformation programs.

quantiphi
Solving What Matters

Quantiphi's governance-led and outcome-driven GenAI advisory combines domain expertise and structured frameworks to enable enterprises to realize sustained business impact across diverse enterprise environments.

SIGMOID

Sigmoid utilizes deep expertise across CPG, life sciences and BFSI to align AI investments with business goals, supporting enterprise transformation through structured opportunity assessments, use-case prioritization, governance frameworks and AI readiness programs.

Straive

Straive's AI operationalization model integrates deep domain expertise and modular engineering, connecting strategy with workflow redesign and execution while strengthening its ability to move enterprise AI initiatives from opportunity identification into production.

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Tiger Analytics

Tiger Analytics combines strategic planning, organizational enablement, and responsible AI governance to help enterprises align GenAI investments with business outcomes and accelerate enterprise-scale GenAI adoption.

TREDENCE
Beyond Possible

Tredence effectively bridges strategy and execution through structured advisory frameworks that integrate value realization, governance and lifecycle management, empowering enterprises to scale GenAI initiatives with confidence and achieve consistent business impact.

VERSION 1

Version 1 enables GenAI strategy development through iterative discovery sprints and value-based decision frameworks, ensuring enterprises align AI investments with operational readiness, capability gaps and transformation priorities, maintaining governance.

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Leader

"Version 1 integrates AI co-creation studios, scoring engines and change frameworks to build pragmatic GenAI transformation strategies that are measurable, scalable and aligned with enterprise-wide transformation programs."

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Version 1

Overview

Version 1 is headquartered in Dublin, Ireland. It has more than 4,200 employees across multiple offices in Ireland, the U.K., the U.S., Spain, Australia and India. The firm delivers GenAI consulting through a structured operating construct centered on its AI Transformation Factory, which connects prioritization, co-creation, delivery, governance and continuous improvement into a unified system. Version 1 uses a dual approach that combines top-down executive-led envisioning with bottom-up idea sourcing, ensuring that use cases reflect both strategic priorities and operational realities. It emphasizes value-based sequencing using scoring frameworks that evaluate feasibility, ROI and readiness.

Strengths

Use-case prioritization framework: Version 1 applies a structured scoring mechanism to evaluate GenAI opportunities based on feasibility, business impact and implementation readiness. This method helps enterprises focus on high-value initiatives rather than fragmented experimentation. By tying prioritization directly to ROI and measurable KPIs, the approach provides a disciplined entry point into transformation programs, enabling faster stakeholder alignment and more predictable delivery outcomes across business units.

Embedded governance and compliance design: Version 1 integrates governance frameworks directly into its consulting lifecycle, aligning with standards and regulatory requirements such as the EU Data Act and EU AI Act. This ensures embedded governance early into the lifecycle, enabling enterprises operating in regulated verticals to adopt GenAI solutions while maintaining compliance and reducing risk exposure.

Adoption-focused change enablement: Version 1 integrates behavioral change models to address individual and organizational adoption challenges. The company focuses on capability building, communication and reinforcement of new ways of working to ensure GenAI initiatives are effectively embedded into daily operations, improving user engagement and sustained enterprise-wide adoption.

Caution

Version 1 should strengthen its market visibility by developing industry-focused advisory toolkits that encapsulate its consulting methodologies into repeatable assets, enabling faster adoption across its target verticals.

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Development and Deployment Services — Specialists Providers

Who Should Read This Section

This report is valuable for specialist service providers offering generative AI (GenAI) development and deployment services globally to understand their market position and for enterprises looking to evaluate these providers. The report highlights how specialist providers apply domain-led expertise to address business challenges through targeted Gen AI strategies. It highlights how their industry knowledge enables tailored solutions that account for operational complexities, regulatory needs and sector-specific requirements.

Line-of-business managers

Should read this report to understand how providers build and deploy agentic platforms aligned with business goals. The report highlights providers' capabilities in orchestrating multimodal GenAI platforms, managing agent lifecycles and providing observability tooling. It also shows how these solutions improve efficiency, decision-making and customer engagement at scale.

Chief data and AI officers

Should read this report to identify providers that operationalize data governance and evaluation pipelines for GenAI. The report outlines how providers ensure data quality, security and compliance across the AI lifecycle. It also shows how hybrid LLM-SLM architectures and control towers deliver transparent, scalable oversight across GenAI applications, including private and sovereign deployments.

Chief information officers

Should read this report to identify providers that ensure seamless GenAI deployment, with a focus on system interoperability and scalability across cloud and legacy environments. The report outlines how providers architect secure, sovereign-ready infrastructure that maintains data accuracy, performance and regulatory alignment at production scale.

Strategy professionals

Should read this report to understand how providers help enterprises translate GenAI investments into long-term competitive advantage. The report highlights how providers combine domain expertise, engineering depth and orchestration capabilities to build future-ready platforms that are scalable, resilient and responsive to market dynamics.

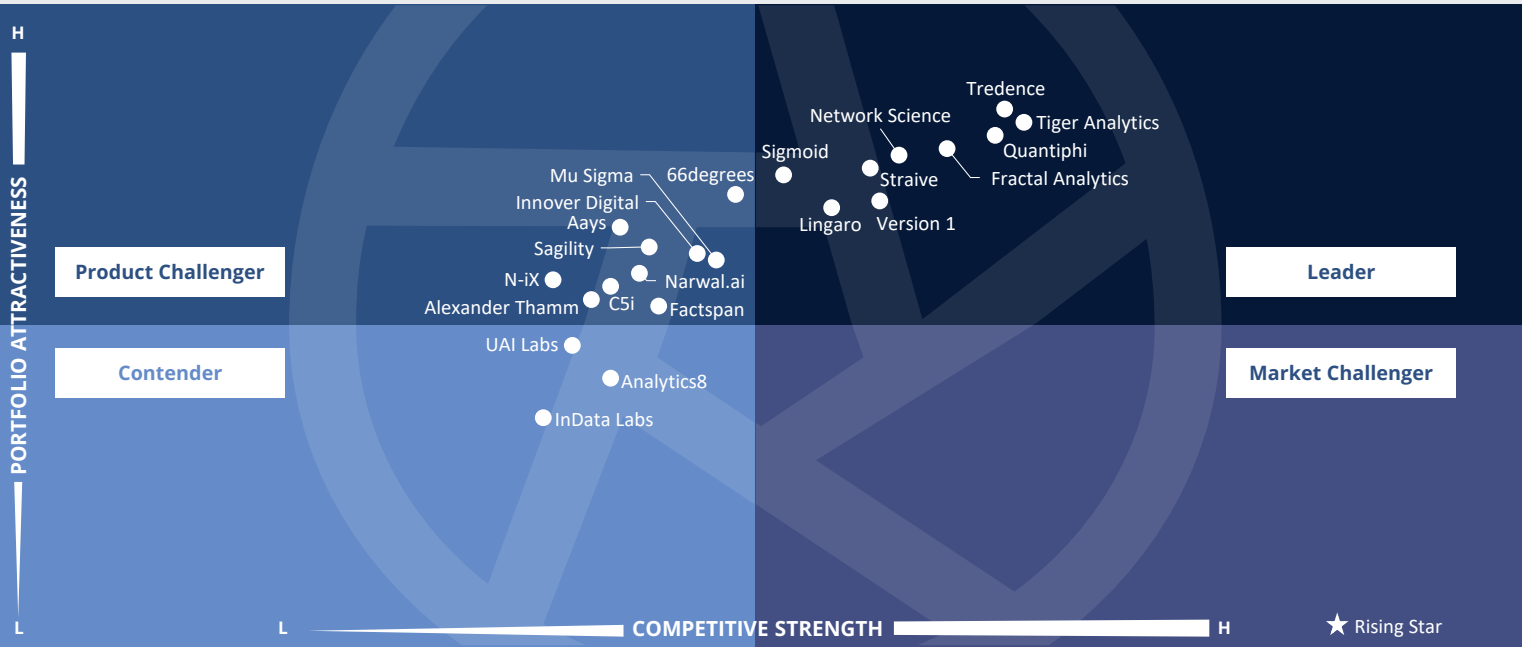
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ISG Provider Lens®

Source: ISG RESEARCH

Generative AI Services — Specialists
Development and Deployment Services — Specialists Providers

Global 2026



This quadrant assesses GenAI **development and deployment** providers that deliver secure, compliant model integration for enterprises, enabling **seamless implementation and measurable value** through robust, adaptable AI ecosystems.

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Definition

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

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

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

Eligibility Criteria

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

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Observations

Specialist providers are building a differentiated positioning in the GenAI development and deployment market by operationalizing AI engineering expertise with deep domain knowledge. Their approach is centered on solving specific industry and functional challenges through bespoke GenAI solutions that incorporate industry context, domain taxonomies and workflow intelligence.

A core differentiator of specialists is their emphasis on domain-led solution engineering. Their development approaches emphasize contextual and cross-functional integration of GenAI into existing workflows, enterprise systems and operating environments. Specialist providers are increasingly developing reusable accelerators and co-developing and fine-tuning domain-specific small language models (SLMs) with partners to solve deep contextual problems across verticals. Their lean structures enable them to iterate quickly, customize solutions extensively and translate emerging GenAI innovations into practical industry use cases.

With mature capabilities in platform integration, multi-modal deployment and governance controls, specialist providers are evolving their niche beyond operationalizing GenAI solutions to positioning themselves as long-term AI partners that deliver end-to-end services.

Some of the key market trends include:

- Evolution toward enterprise knowledge architectures for developing ontologies
- Increasing use of proprietary datasets, semantic and reasoning models and decision-centric context graphs to improve contextual relevance
- Increased focus on workflow-embedded GenAI solutions tailored to specialized business functions

From the 111 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.

fractal

Fractal Analytics' enterprise-grade Cogentiq platform, LLM-Studio, proprietary reasoning models and observability frameworks center on reusable foundations to augment domain-specific model-adaptation and enable enterprise-scale operational deployment.

lingaro

Lingaro builds enterprise GenAI platforms that integrate deep data and AI engineering expertise, along with workflow embedding, to ensure solutions are scalable, reliable and aligned with operational requirements across cloud, hybrid and data-driven environments.

Network Science

Network Science enables enterprises to scale GenAI initiatives through its NSOffice. AI® platform, combining model-agnostic architectures, enterprise integration and governance-driven deployment frameworks to operationalize AI across functions.

quantiphi
Solving What Matters

Quantiphi delivers production-grade GenAI solutions utilizing advanced model engineering, enterprise integration and continuous optimization frameworks, enabling enterprises with high-performance AI operations across business processes.

SIGMOID

Sigmoid combines custom model development, RAG architectures, multi-modal AI and enterprise integration services to operationalize GenAI across business workflows while maintaining governance and operational control.

Straive

Straive's build-and-run model combines rapid AI engineering, managed operations, model benchmarking and modular assets, enabling enterprises to move from feasibility into production workflows while retaining flexibility to adapt architectures and model choices as underlying AI technologies evolve.

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Tiger Analytics combines data, analytics and GenAI into business-focused solutions that generate insights, automate knowledge work and accelerate enterprise decision-making through scalable and production-ready AI deployments.

Tredence leverages its platform ecosystem, including ATOM.AI and RAPID, to accelerate solution development and embeds governance, security and compliance controls within deployment to ensure trusted operations across the enterprise.

Version 1 accelerates GenAI solution delivery by embedding AI across the SDLC lifecycle, leveraging development approaches, proprietary tools and integrated AI platforms to enhance productivity, streamline testing and enable efficient modernization.

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Leader

"Version 1's regulatory context-aware governance approach aligns enterprise GenAI initiatives with business objectives, geographic footprint and regulatory exposure to ensure compliance with evolving frameworks."

Gowtham Kumar Sampath and Saravanan M S

Version 1

Overview

Version 1 is headquartered in Dublin, Ireland. It has more than 4,200 employees across multiple offices in Ireland, the U.K., the U.S., Spain, Australia and India. Version 1 delivers GenAI development services through an AI-native engineering approach that integrates accelerated SDLC practices with ModelOps capabilities. The company emphasizes lifecycle governance, combining engineering discipline with operational monitoring, observability, predictive maintenance and process optimization capabilities, to create resilient AI systems that scale reliably across complex enterprise environments while maintaining performance and compliance standards.

Strengths

Lifecycle-driven model management: Version 1 supports full lifecycle management of GenAI solutions, including deployment, monitoring, retraining and optimization. This ensures models remain accurate and effective as business requirements and data conditions evolve. Continuous lifecycle management reduces the risk of model degradation and enables enterprises to maintain consistent performance across long-running AI applications in production environments.

Reusable component strategy: Version 1 accelerates development by leveraging reusable AI components and pre-built capabilities across projects. This reduces duplication of effort and improves consistency across deployments, enabling faster onboarding of new use cases while maintaining high-quality standards, particularly in environments where multiple AI applications are developed and deployed simultaneously across different business units.

Process and enterprise system integration: Version 1 aligns GenAI deployments with business workflows and integrates solutions with existing enterprise systems through APIs and structured data pipelines. Embedding solutions directly into operational processes improves usability and ensures that AI outputs are directly consumed within operational workflows rather than functioning as standalone systems.

Caution

Version 1 has demonstrated a niche strength in delivering holistic solutions for highly regulated enterprises and public sector clients. It should extend domain-specific deployment blueprints to accelerate adoption and enable faster implementation across regulated verticals.

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Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Generative AI Services — Specialists 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 the Generative AI Services — Specialists 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 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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Saravanan M S is a Senior Lead Analyst at ISG Research, with over 10 years of experience across research and consulting roles. He specializes in market intelligence, competitive benchmarking and provider ecosystem analysis with a strong focus on AI-led transformation, data modernization and ecosystem-driven innovation, shaping perspectives on emerging AI paradigms. He authors ISG Provider Lens® reports on advanced analytics & AI services, palantir-ecosystem partners and AI-industry intersection reports for retail, CPG, supply chain, life sciences and healthcare.

Saravanan contributes to thought leadership initiatives through whitepapers, articles and capability reports across the data, analytics and AI spectrum, helping organizations translate emerging technologies into actionable strategies.

In his previous role, Saravanan has led several research and consulting engagements, delivering opportunity identification frameworks and strategic insights to clients.

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Study Sponsor



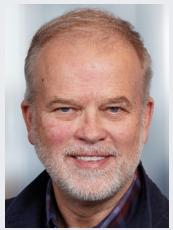
Namratha Dharshan

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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