ISG Provider Lens®

AI-Driven ADM Services

Application Quality Assurance

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

cognizant

QUADRANT REPORT | SEPTEMBER 2025 | APAC

Table of Contents

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Report Author: Maharshi Pandya

AI transforms the application development lifecycle, boosting innovation and efficiency

Application development and maintenance are undergoing a profound transformation in the Asia-Pacific (APAC) region. This change is largely fueled by integrating AI into different stages of the application lifecycle, significantly altering how applications are developed, maintained and deployed. The region's dynamic economies are embracing these advancements, driven by digital transformation initiatives and strong governmental support.

Areas including digital infrastructure enhancement and the growing startup ecosystem have accelerated this shift. Enterprises are now using AI technologies to streamline existing processes and drive innovation and adapt to rapidly changing market demands. This comprehensive overview presents key trends and strategic responses shaping these services in pivotal APAC markets.

AI-augmented application services:

The advent of AI has revolutionised application development and maintenance processes by embedding intelligence into every stage of the software lifecycle. Organisations across APAC are embracing AI technologies such as generative models that assist in the automatic generation of code snippets, perform detailed static code analysis and predict potential bugs. These actions reduce human error and elevate the coding process's efficiency and accuracy.

Furthermore, intelligence-driven application monitoring optimises application uptime, identifying and rectifying issues faster than traditional methods. This capability includes self-healing applications that automatically resolve detected issues, significantly boosting operational efficiency and reliability.

AI's potential to automate repetitive tasks is leveraged extensively in development operations, giving developers the freedom to focus on strategic and complex problem-solving tasks. Automated code generation and enhanced bug detection are integral components of this process, providing

APAC's lifecycle app transformation is **driven by AI** and **government support, boosting innovation.**

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developers with robust tools to streamline their workflows and produce high-quality outputs. AI-powered code assistants are widely used to offer context-aware suggestions, automated error detection and even to generate entire code structures. This acceleration in the development process improves code quality and overall UX.

Predictive maintenance is another crucial area in which AI is making substantial contributions. Integrating with technologies that support real-time monitoring and issue resolution, AI helps in predicting failures, thereby maintaining high system uptime and operational efficiency. Moreover, integrating AI with development platforms enhances the management of tasks by understanding context better, predicting failures and adapting support according to developer workflows. This democratisation of AI in development broadens its applicability and elevates operational capabilities to increased efficiency levels.

Shift to AI-driven test automation:

Transitioning from manual Quality Assurance (QA) processes to AI-driven test automation is notably significant across APAC. The introduction of self-learning QA systems has greatly increased the agility and accuracy of testing practices. These systems leverage AI for auto-generation of test scripts, identifying defect-prone areas and self-healing during user interface and API changes, drastically reducing dependence on manual intervention and optimising test cycles.

AI-based testing tools have seen increased adoption due to their ability to streamline manual efforts. Integrating AI and ML into testing frameworks, testing cycles have become more agile than legacy testing methods, with enhanced analysis capabilities resulting in increased quality outputs. The transition towards AI-driven testing represents a future-oriented shift focusing on enhanced analysis processes that ensure the rapid production of high-quality software.

Within many organisations in APAC, testing CoE are rapidly incorporating these advanced AI techniques to optimise their testing services. These endeavors underscore the industry-wide push for more dynamic and responsive compared to previous approaches, which enhances the efficiency and reliability of software products. AI-driven testing reduces the overhead associated with manual testing and also improves time-to-market for new features and applications, leading to significant competitive advantages.

Generative AI(GenAI) for application modernisation:

AI's role in application modernisation is becoming more pronounced as enterprises across the region move away from legacy systems towards modern architectures. The use of AI offers robust solutions for code refactoring, dependency mapping and extracting business logic from old source code. These capabilities support smoother, quicker transitions to contemporary, microservices-based frameworks.

Innovative organisations are investing in AI-driven modernisation to improve operational efficiencies and bring their service delivery standards in line with modern expectations. The shift from antiquated systems allows businesses to adopt scalable, flexible approaches that improve customer satisfaction and align with evolving market demands. Within this context, AI provides invaluable assistance by recommending code updates and predicting necessary infrastructural changes to future-proof applications.

Enterprises across different sectors are recognising the significant impact modernisation can have on business efficiency and competitiveness. AI accelerators focused on replatforming are critical tools in this process, enabling rapid, reliable transitions from legacy systems to cutting-edge platforms that support great agility and innovation. These technologies offer a new frontier in application development, driving enhancements in productivity and operational efficacy.

AI-driven observability and predictive maintenance:

The integration of AI into observability and predictive maintenance is also notable. AI's ability to provide advanced solutions for application deployment post-launch is revolutionising how enterprises address software health monitoring. Predictive maintenance employs AI for tasks such as

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predictive failure detection, diagnosing root causes and conducting user behavior analytics. These applications are crucial in ensuring they remain reliable and efficient long after launch.

The deployment of systems integrating ML for enhanced application performance monitoring is an exceptional advancement. Organisations are developing competencies that enhance its ability to predict and address potential issues before they affect end-users, ensuring seamless service with fewer interruptions. This proactive approach, powered by AI, positions enterprises to better meet consumer expectations for uninterrupted service and superior UX.

Enhancing observability through AI-driven analytics and insights, businesses can ensure that applications meet the highest standards of reliability and usability. AI's role in predictive maintenance underlines the transition from reactive to proactive management of application health, thereby reducing downtime and enhancing customer satisfaction.

Regional capability shifts and talent alignment:

APAC is rapidly evolving into a strategic hub for delivering AI-enabled application development and maintenance services. This transformation sees the region shifting from a focus on cost efficiencies to becoming a hub for innovation and advanced technology deployment. Innovation hubs across APAC are instrumental in leading these shifts and they are supported by a wealth of IT talent and expertise.

Southeast Asia, in particular, stands out as a vibrant centre for growth in quality assessment and testing services, leveraging specialised niches for rapid expansion. Organisations across the region are positioning themselves strategically to harness AI capabilities in their operations, underlining a broader shift towards adopting smart technology solutions.

Additionally, the emphasis on aligning talent with evolving industry needs is a crucial component of this transformation. Businesses are increasingly focusing on cultivating a workforce skilled in AI applications, recognising the critical role talent development plays in maintaining a competitive edge. As AI integration becomes more prominent, the demand for skilled professionals with expertise in these technologies grows accordingly, driving educational initiatives and professional development programs across APAC.

AI governance, testing and security trends:

As AI becomes deeply embedded in application development, there is a growing concern about governance and security. Ensuring ethical and transparent AI usage is crucial for maintaining trust and compliance in operations. As AI models take on more critical roles, areas such as bias testing, model validation and security assessments for complex applications are gaining traction across the industry.

This focus on AI governance underscores the importance of maintaining robust ethical standards and transparency throughout the AI lifecycle. Compliance frameworks and standards are being developed to guide responsible AI adoption, ensuring that AI operations are aligned with industry best practices and regulatory requirements. Businesses are also integrating security-focused suites into their operations, addressing the ethical and operational challenges AI technologies present.

Such efforts reflect broader industry concerns regarding bias and fairness, which are essential for sustaining consumer trust in AI-driven solutions. Adopting clear governance principles, enterprises can ensure that their AI systems operate ethically and transparently, contributing positively to business objectives and consumer experiences.

The APAC region is experiencing dynamic growth in AI-driven application development, maintenance and testing services, propelled by digital transformation efforts and increasingly complex industry demands. The emphasis on AI's integration into various stages of software development positions APAC as a leader in innovative service delivery, opening up new opportunities for growth and technological advancement.

Leadership within the region is spearheading these developments, motivating Southeast Asia and other areas to enhance their capabilities and embrace AI advancements. The strategic implementation of AI technology enhances service quality, efficiency and reliability, setting the region on a promising trajectory towards becoming a global hub for AI-enabled service provision.

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Executive Summary

The choice of partners — whether large global service providers or specialised niche providers will play a critical role in navigating this dynamic landscape. As both offer complementary expertise, businesses will need to carefully determine which partnerships best align with their strategic goals and operational requirements.

In conclusion, this robust analysis underscores the transformative influence of AI-driven strategies across the APAC region's application development and maintenance lifecycle. Embracing emerging AI innovations, enterprises are well-positioned to achieve robust growth, technological leadership and invaluable advancements in today's competitive market. Opportunities are abundant for enterprises ready to leverage AI technologies effectively and responsibly, driving forward with innovation and strategic foresight.

The APAC region is witnessing a transformation in application development, fueled by AI integration at all stages of the lifecycle. Supported by digital initiatives and governmental aid, dynamic economies focus on enhancing digital infrastructure and expanding the startup ecosystem. Enterprises use AI to innovate, streamline processes and adapt to market demands in the high-growth APAC market.

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Provider Positioning

Page 1 of 4

	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Accenture	Leader	Leader	Leader
Amdocs	Contender	Not In	Product Challenger
Aspire Systems	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Cybage	Contender	Not In	Contender

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Provider Positioning

Page 2 of 4

	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Datamatics	Contender	Contender	Contender
Deloitte	Rising Star ★	Rising Star ★	Rising Star ★
DXC Technology	Leader	Leader	Leader
Encora	Contender	Contender	Product Challenger
FPT Software	Market Challenger	Contender	Contender
Fujitsu	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Not In	Product Challenger
Hitachi Digital Services	Rising Star ★	Rising Star ★	Not In

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Provider Positioning

Page 3 of 4

	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
IBM	Leader	Leader	Leader
Infinite Computer Solutions	Contender	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader
ITC Infotech	Not In	Not In	Contender
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Product Challenger	Product Challenger
Mastek	Contender	Not In	Not In
Mphasis	Contender	Product Challenger	Contender
NTT DATA	Product Challenger	Product Challenger	Product Challenger

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Provider Positioning

Page 4 of 4

	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Persistent Systems	Product Challenger	Product Challenger	Product Challenger
Planit	Not In	Not In	Leader
QA Consultants (ALTEN)	Not In	Not In	Contender
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader
ThoughtWorks	Contender	Contender	Not In
Unisys	Not In	Product Challenger	Not In
UST	Contender	Contender	Product Challenger
Wipro	Leader	Leader	Leader

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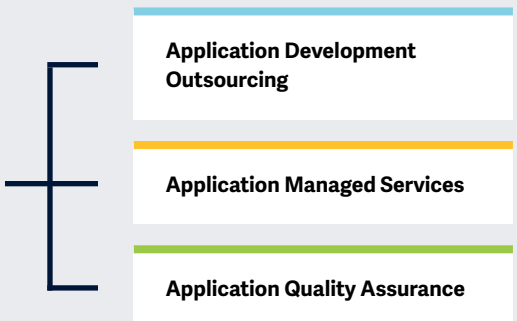
The study covers providers' key **AI-enabled capabilities** across application development, managed services and quality assurance or testing.



Simplified Illustration Source: ISG 2025

Definition

The application services outsourcing market is undergoing significant transformations as enterprises increasingly prioritise deriving strategic value from outsourcing partnerships. Central to this shift is the widespread integration of AI, including generative AI (GenAI) and intelligent agents, across the entire SDLC to optimise efficiency and foster innovation.

Providers are rapidly developing capabilities leveraging these advanced technologies to deliver measurable business outcomes for their clients. Enterprises are seeking outsourcing partners with specialised skills capable of deploying AI-driven solutions to streamline crucial activities such as requirements analysis, design and coding. AI-enhanced tools inform feature prioritization through historical data and user insights, while ML algorithms recommend optimal design decisions based on previous project patterns.

AI-enabled testing and QA solutions significantly enhance software reliability through intelligent test case generation and predictive quality assurance practices. As organizations emphasise data security and compliance, outsourcing decisions depend on a provider's ability to implement robust security frameworks and manage risks.

This ISG Provider Lens® study highlights service providers with advanced capabilities and a proactive approach to integrating advanced AI technologies within their ADM services. Providers participating in this research will gain valuable insights into market expectations and opportunities to showcase their unique strengths in a rapidly evolving landscape.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following three (spell out the number of quadrants; do not use a digit) quadrants for services: Application Development Outsourcing, Application Managed Services and Application Quality Assurance.

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 regional 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:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between$20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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 a 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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Application Quality Assurance

Who Should Read This Section

This report is valuable for service providers offering **application quality assurance (QA) services** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief technology officers (CTOs)

should read this report to understand how other providers are integrating AI-driven predictive analytics and GenAI testing to enhance application quality across client portfolios. They can ensure the development of methodologies for business process optimization and project planning that align with client needs. They can also assist enterprises in driving the adoption of quality frameworks and training programs to improve their software engineering capabilities.

Operations professionals

should read this report to understand how providers manage the operational execution of QA services. They can learn how other providers are utilizing AI and GenAI tools to monitor application performance and optimize business processes, ensuring high-quality deliverables. This approach enhances operational efficiency and stakeholder value and provides business benefits such as cost savings, enhanced productivity and stronger client trust.

IT professionals

should read this report to design and implement QA services using conventional and AI-driven testing strategies to identify bugs, enhance code quality and ensure infrastructure resiliency. They can support clients with tailored processes and digital testing across diverse applications, delivering business benefits such as reduced downtime, improved product reliability and faster market delivery.

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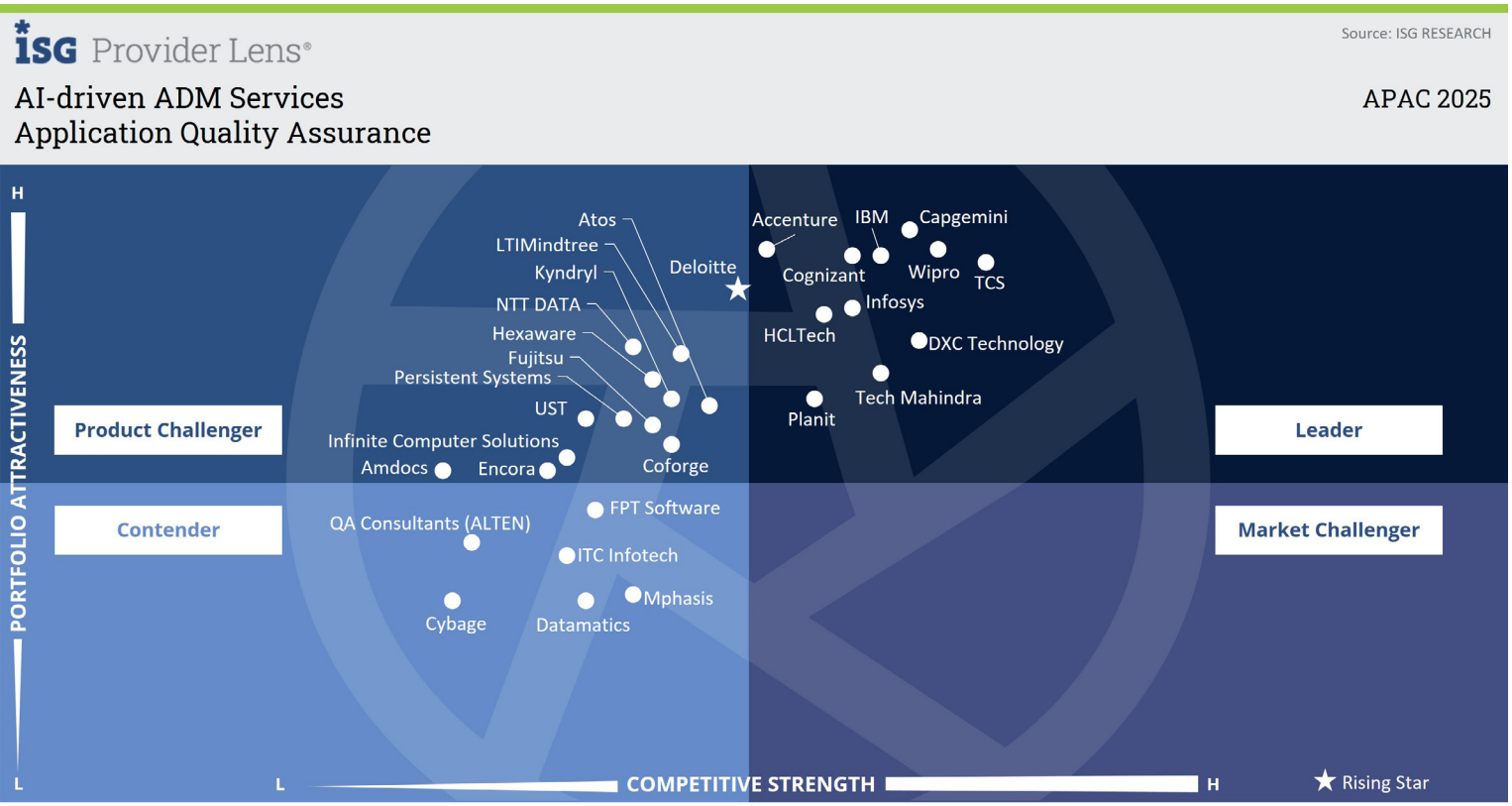

This quadrant assesses service providers offering QA and continuous testing services using **AI and GenAI** for **predictive analytics**. These services **optimise processes,** ensure high quality, **automate test generation** and **boost app resilience and security**.

Maharshi Pandya

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Definition

This quadrant evaluates service providers offering QA services encompassing assessments, design, implementation and managed services. Deliverables include methodologies for business process optimisation, effort estimation, project planning, documentation, sprint execution timelines and completion criteria. The services utilise conventional and GenAI-driven testing strategies, along with AI-driven predictive analytics, to identify bugs or defects and determine the level of business process optimisation achieved. Providers tailor processes to ensure high quality across clients' application portfolios and use quality frameworks to enhance application code quality, infrastructure resiliency, digital testing and security. QA services also incorporate training to help clients improve their software engineering capabilities. This quadrant assesses how providers utilise production logs for actionable insights and integrate AI and ML tools in application performance management to monitor data and predict new applications' quality.

Eligibility Criteria

1. **Centralised QA** unit that sets quality standards for clients' projects
2. Comprehensive technical **QA framework,** which includes planning, implementation, monitoring, review and improvements
3. **QA methods for AI applications** integrated within the larger IT landscape
4. **Consulting team** focused on analysing business demands and securing development and delivery according to business requirements
5. **Technology for analytics** over logs and AI implementation for continuous improvement in results
6. **Differentiation with proprietary tools,** leveraging vendor partnerships for quality monitoring, application performance and testing tools
7. **Training and education programs** for developers, testers and operators to develop a quality excellence mindset and ensure that the overall product or service meets the desired quality

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Observations

Application Quality Assurance and testing services are adapting rapidly to keep pace with technological advancements and the increasing complexity of applications. A prevalent trend is the integration of automated testing tools and frameworks, enabling rapid and increased reliable testing cycles, an essential need for today's fast-paced application development environments. Providers are offering continuous testing services that align with Agile and DevOps practices, facilitating ongoing feedback and improvement throughout the development cycle. The rise of AI and ML is notable, with smart testing solutions that harness data for predictive analytics, identifying defects early and reducing time-to-market. Security testing is gaining prominence, reflecting the increasing importance of safeguarding applications against vulnerabilities and cyber threats. Testing services have expanded beyond traditional functionality assessments to include performance, usability and compatibility across diverse platforms and devices. Providers emphasise collaborative approaches, working closely with development teams to ensure quality standards are met and continually refined. The focus on customised solutions reflects a deep understanding of diverse application landscapes, ensuring tailored QA strategies that enhance overall product reliability and customer satisfaction.

From the 53 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture leads with predictive analytical testing, ensuring software integrity and tailoring solutions to dynamic client requirements.

Capgemini strategic focus on QA ensures robust software performance through meticulous testing methodologies and reliability practices.

Cognizant's employs automation and predictive testing to deliver consistent software reliability and continuously surpass client expectations.

DXC Technology excels in QA, employing precision-focused testing to guarantee robust, error-free software applications.

HCLTech emphasises precise QA, employing comprehensive testing methodologies to ensure software excellence and reliability.

IBM emphasises high-quality assurance practices, leveraging advanced technologies to deliver consistent software reliability and performance.

Infosys advances QA through strategic automation and predictive techniques, ensuring reliable software delivery and client commitment.

Planit's testing emphasises robust reliability through specialised QA protocols, ensuring software excellence.

TCS assures software reliability with precision testing protocols, emphasising robust methodologies that ensure optimal client outcomes.

Tech Mahindra fortifies QA with predictive frameworks, delivering reliable software outcomes aligned with strategic goals.

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Wipro validates software integrity through robust testing mechanisms, ensuring reliability across diverse applications.

Deloitte (Rising Star) delivers QA using precision-driven testing techniques, ensuring reliable, robust software delivery and client satisfaction.

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Leader

"Cognizant employs GenAI-driven QA frameworks and proprietary analytics to boost software quality, accelerating release cycles with predictive, continuous testing capabilities."

Maharshi Pandya

Cognizant

Overview

Cognizant is headquartered in New Jersey, US. It has more than 336,800 employees across over 50 countries. In FY24, the company generated $19.7 billion in revenue, with Health Sciences and Financial Services as its largest segments. Cognizant is actively enhancing QA and testing through GenAI-driven automation, analytics and platforms. Cognizant enhances testing coverage and speed through GenAI-driven automation and analytics, focusing on QA. Its extensive presence includes delivery hubs and CoEs across India, ANZ and Southeast Asia. The company serves core industries such as banking and financial services, healthcare and retail, aligning services to meet sector-specific demands effectively.

Strengths

Targeted skill development and localisation: Cognizant's Immersive Learning Centre in Chennai offers specialised training, focusing on GenAI and QA automation, creating a skilled workforce. Additionally, its Advanced AI Lab develops multilingual QA frameworks that address linguistic diversity.

Strategic partnerships: Cognizant also leverages the strength of its partner products such as Tricentis, Worksoft, Perforce, to incorporate AI in QE activities as per needs from various APAC clients, to drive efficiency and optimisation.

Comprehensive Service Offerings: Cognizant's comprehensive service offerings portfolio, including Intelligent QE, Technology Assurance, Experience Assurance, Business Assurance and Advisory, focuses on addressing the changing dynamics of business, technology and client experience.

Proactive QA automation and AI integration: Intelligent QE is central to the offerings and Cognizant has invested in building AI driven next-gen platforms, that help in efficient and optimized QE for APAC clients. Cognizant Flowsource™ improves engineering productivity and software quality by simplifying adoption of agentic AI and GenAI-powered tools within a single collaborative interface. Cognizant Neuro® AI is a comprehensive AI engineering platform that leverages AI for automation and QE.

Caution

Cognizant can focus on obtaining expanded contracts and growing its presence in ANZ to strengthen its position relative to its competitors. Implementing these strategies will reinforce its leadership in APAC's evolving QA landscape.

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Appendix

The ISG Provider Lens® 2025 – AI-driven ADM Services study analyzes the relevant software vendors/service providers in the APAC, 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 2025 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 ($) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of AI-driven ADM Services market
2. Use of questionnaire-based surveys of service providers/ vendors 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 and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following main 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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Maharshi Pandya

Senior Lead Analyst

Maharshi Pandya is a Senior Lead Analyst at ISG and is responsible for authoring ISG Provider Lens® studies on SAP Ecosystem, AI-driven ADM Services and Oracle Ecosystem Services. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Before this role, he has been associated with several syndicated and custom market research firms, in which he has worked on both, secondary and primary interaction-centric research projects around market sizing & forecasting, competitive benchmarking, pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media & information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.

Study Sponsor

Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

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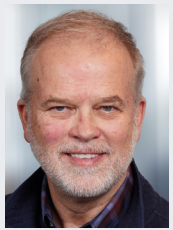
IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

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 partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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

For more information about ISG Provider Lens® research, please visit this webpage.

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ISG

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

For more information, visit isg-one.com.

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SEPTEMBER, 2025

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