ISG Provider Lens®

AI-Driven ADM Services

Application Development Outsourcing

Evaluating application service providers' AI-enabled offerings, capabilities and services

Customized report courtesy of:

cognizant

QUADRANT REPORT | OCTOBER 2025 | EUROPE

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Report Author: Oliver Nickels

ADM begins its co-intelligence phase, with hybrid teams of human engineers and GenAI agents

Over the past year, European application services, spanning development outsourcing (ADM), management services (AMS) and quality assurance (QA), have transformed rapidly. Generative AI (GenAI) has evolved from experimentation to a foundational enabler of service delivery, integrating deeper into software life cycles and addressing client demands, cost pressures, intensified security priorities and legacy modernization efforts.

GenAI as the new core of ADM

GenAI is now embedded in every stage of application delivery, automating code generation, test orchestration, release monitoring and resilience modeling. Forecasts indicate that Europe's AI spending will reach $144 billion by 2028, with GenAI accounting for one-third of that total. Organizations across sectors are building internal AI pipelines, training staff on large language model (LLM) orchestration and spinning up domain-specific GenAI agents. The EU's AI Act and voluntary Code of Practice, effective August 2025, will shape AI function delivery with compliance and transparency.

Europe's compliance landscape mandates that AI deployments meet GDPR, the AI Act and sectoral regulatory standards. Many clients opt for sovereign or hybrid cloud models to comply with data residency and transparency requirements. Concurrently, GenAI is leveraged for real-time threat detection, policy enforcement and self-healing operations, making security integral to transformation.

Economic pressures are prompting clients to seek short- and long-term value from AI-driven solutions. While R&D and enablement require upfront investment, automated workflows and intelligent orchestration promise 30 percent to 50 percent efficiency gains in development and operations. Providers now offer outcome-based modular contracts that enable clients to scale transformation and manage costs incrementally.

GenAI has matured into an ADM centerpiece, **reshaping service delivery** across all tiers.

Organizations use GenAI for targeted code modernization rather than entirely replacing high-value legacy systems. GenAI assists in translating legacy codebases, generating test scripts and automating documentation for refactoring projects. According to ISG, legacy systems will remain central to enterprise technology stacks for years, a trend reinforced by cloud migration complexity and compliance needs.

Improvement in Agile and DevSecOps maturity is evident across industries. GenAI-powered QA frameworks now deliver self-healing test pipelines, while AIOps-driven AMS approaches expedite incident triage and automated resolution. Clients increasingly demand integrated, end-to-end lifecycle delivery, embedded with intelligence instead of siloed functional teams.

GenAI development

GenAI has progressed in Europe from novelty to a central role, reshaping service delivery across all tiers.

LLMs such as GPT4, Claude and Gemini are adapted to European contexts through language fine-tuning, data residency controls and sector-specific guardrails. Organizations are developing AI pipelines that ingest enterprise artefacts (code, specifications, logs and test cases) to create delivery-ready AI assets such as autonomous code assistants, test scenario suggesters and remediation agents. Clients can now codesign transformation plays that include **GenAI adoption paths,** with advisory-led change frameworks, readiness maturity assessments and iterative rollouts designed for regulatory alignment.

European governments are accelerating investments in sovereign AI infrastructure. Germany plans GenAI gigafactories powered by EU and national funding, weighing into the AI Act ecosystem. The AI Refinery initiative by Accenture and NVIDIA is an example of industrializing secure GenAI across Europe. Meanwhile, the EU's GenAI4EU and InvestAI programs promote open-source models and startup-centered capabilities.

At the enterprise level, use cases have moved beyond code generation. GenAI is now used for continuous code review, predictive observability, compliance mapping and business-level QA validation. Agents collaboratively support engineering teams, expected to develop into co-owners of service delivery. Clients increasingly require full provenance in AI decision-making and the ability to modify, tune or revoke AI behaviors, especially in regulated industries such as healthcare, finance and energy.

Overall, GenAI has matured into a core delivery philosophy, transitioning from a feature to an operational imperative shaping architecture, team structures, commercial models and governance.

GenAI in ADM: integration, limitations and future outlook

The application development and management (ADM) market is fundamentally transforming, with GenAI evolving from a promising innovation into a core service delivery pillar. Over the past 12-18 months, service providers have shifted from experimenting with GenAI to embedding it in execution, operationalizing AI across the software lifecycle. Initially isolated use cases in code generation and testing have expanded into a delivery model where GenAI coexists with engineering talent, automation platforms and domain-specific workflows.

Providers are integrating GenAI into their offerings through structured, multilayered strategies. Most models involve embedding GenAI assistants or agents in distinct roles across the software lifecycle as developers, testers and site reliability engineers (SREs), and product owners are now augmented by AI agents capable of supporting or partially executing daily tasks.

In application development, GenAI aids in code scaffolding, documentation synthesis, legacy refactoring, architecture suggestions and technical debt analysis. In AMS, GenAI supports predictive incident resolution, system diagnostics, auto-remediation and SLA enforcement. In QA, GenAI automates test design, expands test coverage, simulates edge cases and evaluates risk. Increasingly, GenAI agents are trained on enterprise-specific artifacts, from source code and process maps to compliance libraries and telemetry logs, making their recommendations context-aware and directly actionable.

Some providers are building centralized AI cores or digital brains to manage knowledge reuse across projects, helping teams reduce ramp-up time, eliminate redundancies and sustain institutional knowledge. Others focus on modularity, offering clients configurable AI plugins or API-based agents that can be integrated into existing pipelines with minimal disruption.

Despite these gains, GenAI's integration into ADM remains uneven. A major limitation is context fidelity — while GenAI can generate convincing outputs, it often lacks the precision needed for high-stakes decision-making in regulated industries. Its outputs still require human review, particularly for security, architecture integrity and business-critical logic.

Data governance and regulatory compliance present additional challenges. In regions such as Europe, strict regulations under GDPR and the EU AI Act require transparency, auditability and role-based access controls, which are conditions that not all GenAI deployments can meet. Additionally, many enterprise clients struggle to align GenAI adoption with their existing DevOps toolchains, especially in legacy environments not designed for modular or AI-native workflows.

Skill gaps also persist. Although GenAI tools are straightforward to trial, few organizations possess the trained talent required to scale and govern them effectively. This is further complicated by a lack of standard KPIs and reference architectures for evaluating GenAI-enabled delivery. Many providers and clients still determine how to define value beyond simple productivity metrics.

ISG's 24-month projection for the ADM market

The ADM market will likely enter a co-intelligence phase, where delivery models will intentionally integrate hybrid teams of human engineers and GenAI agents. Providers will deliver GenAI-infused services while redesigning governance, contracts and organizational structures to accommodate AI participation.

Three key developments are expected to dominate:

- **Maturity of agentic delivery models:** Providers will staff ADM teams with GenAI agents assigned to impact analysis or compliance validation roles, working alongside engineers within feedback loops and learning pipelines.
- **Standardization of outcome-linked GenAI services:** ADM services will be benchmarked against business KPIs, such as faster time to value, higher CX ratings or reduced audit findings, enabled by GenAI support instead of merely measuring productivity gains.
- **Increased ecosystem convergence:** ADM providers will deepen partnerships with LLM vendors, cloud providers and sovereign data platforms to offer compliant, scalable and modular AI platforms tailored to local markets, particularly in Europe.

Clients will simultaneously grow more selective, prioritizing providers capable of delivering GenAI-enhanced services and those that govern, adapt and explain them. Once defined by process maturity, the ADM market will increasingly be evaluated through the lenses of intelligence integration and operational transparency. In this context, GenAI is not merely a differentiator; its responsible, effective and contextual usage will be crucial.

European market dynamics

- **Regulatory alignment:** The introduction of the AI Act and IV Code of Practice has shifted provider delivery models toward built-in compliance. Whitelabel AI cannot cross borders without explicit, auditable governance.
- **Sector mandates:** Europe's public sector, automotive and telecommunications verticals now operate under sovereign cloud and multilanguage service requirements. Providers must demonstrate deep local understanding and ecosystem partnerships to compete.
- **Sustainable AI:** Rising energy costs and carbon mandates prompt clients to expect providers to deliver energy-conscious AI models, ideally using hybrid architectures with ESG metrics and carbon-efficient design.

- **Talent resilience:** Europe lags behind the U.S. in AI investment and talent, prompting joint public-private initiatives and reskilling platforms, often offered through provider-led academies.
- **Ecosystem shifts:** Providers now regularly collaborate with model vendors, local HPC hubs and regional research labs, which is a sign of evolving delivery ecosystems rather than a solo market approach.

Provider landscape dynamics

Market positions have shifted as providers gain AI-capable momentum. Accenture and Capgemini sustain leadership through extensive GenAI platforms, compliant delivery models and robust local presence. TCS, IBM, Atos Group and Deloitte have reclaimed or strengthened their leadership by fusing GenAI with compliance-aware operations. T-Systems has achieved leadership in Europe, particularly through sovereign cloud deliverables supported by GenAI, while NTT DATA advances as a Rising Star, deploying AI maturity frameworks across DACH and Southern Europe.

In Europe, GDPR and the EU AI Act enforce strict rules mandating transparency, auditability and role-based access controls. European verticals now operate under sovereign cloud and multilanguage service requirements. Providers must demonstrate deep local understanding and ecosystem partnerships to remain competitive.

Provider Positioning

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	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Accenture	Leader	Leader	Leader
Atos	Leader	Leader	Not In
Birlasoft	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
Coforge	Not In	Contender	Contender
Cognizant	Leader	Leader	Leader
Datamatics	Not In	Not In	Contender
Deloitte	Leader	Product Challenger	Leader
DXC Technology	Leader	Leader	Leader

Provider Positioning

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	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
EPAM Systems	Not In	Contender	Not In
Fujitsu	Product Challenger	Product Challenger	Contender
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Contender
Hitachi Digital Services	Contender	Not In	Not In
IBM	Product Challenger	Leader	Leader
Infosys	Leader	Leader	Leader
ITC Infotech	Not In	Contender	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
LTIMindtree	Contender	Product Challenger	Product Challenger
NTT DATA	Rising Star ★	Rising Star ★	Product Challenger
Persistent Systems	Contender	Contender	Not In
Softtek	Not In	Contender	Not In
Sopra Steria	Not In	Contender	Contender
Stefanini	Product Challenger	Contender	Not In
TCS	Leader	Leader	Product Challenger
Tech Mahindra	Product Challenger	Market Challenger	Not In
TestingXperts	Not In	Not In	Product Challenger

Provider Positioning

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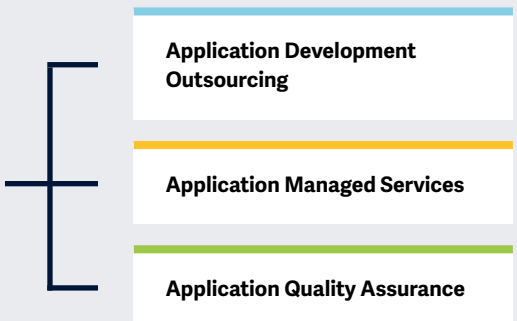
	Application Development Outsourcing	Application Managed Services	Application Quality Assurance
T-Systems	Leader	Leader	Product Challenger
Unisys	Not In	Contender	Not In
UST	Contender	Contender	Not In
Virtusa	Contender	Not In	Not In
Vivicta	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader

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 prioritize 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 optimize 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 specialized 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 emphasize 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.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following three 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) based on their competitive strengths and portfolio attractiveness
- 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).

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.

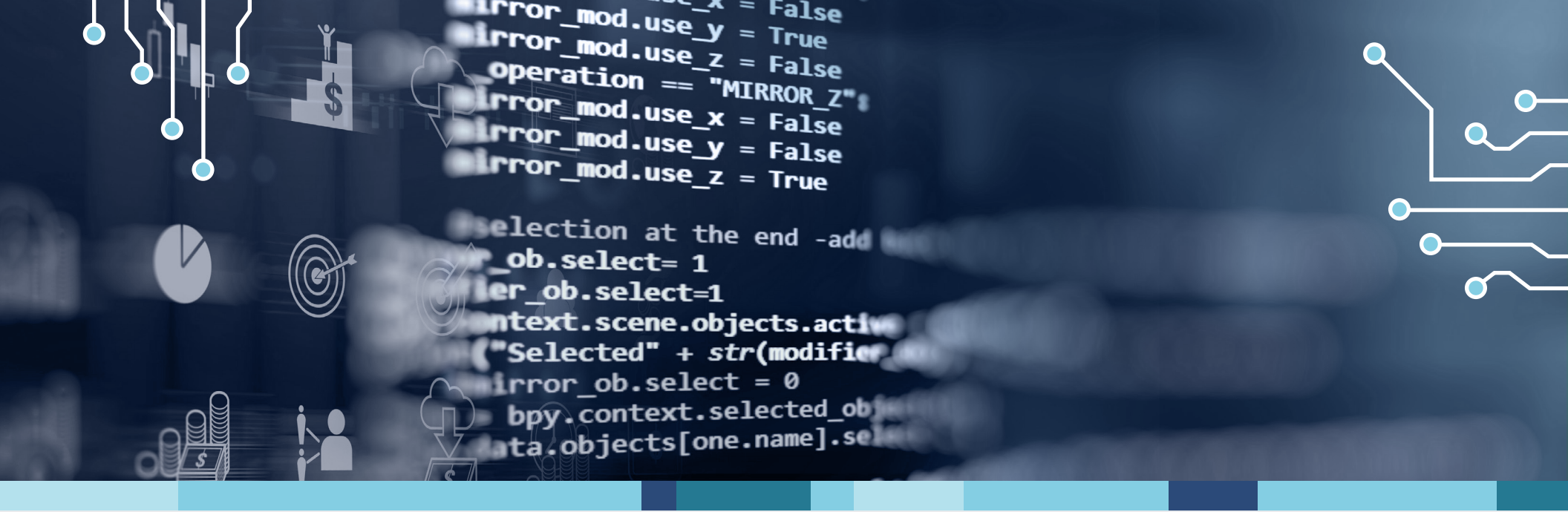
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength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



Application Development Outsourcing

Who Should Read This Section

This report is valuable for providers offering application development outsourcing services in Europe 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 information officers (CIOs) and IT directors

should read this report to evaluate providers' capabilities in CI/CD pipelines, DevOps and AI tools such as ML, NLP and generative AI (GenAI) and select partners that manage complex landscapes. They can drive internal readiness by coordinating with providers to integrate discovery tools for dependency analysis and performance optimization and ensure alignment with enterprise technology goals and infrastructure requirements.

Procurement and vendor management specialists

should read this report to assess provider expertise, partnerships and methodologies to select the best fit for managing intricate application landscapes. They help organizations negotiate and manage contracts with AI-driven ADM service providers, ensuring alignment with enterprise goals and delivery capacities.

Strategy and consulting professionals

should read this report to develop strategic road maps, provide consulting expertise, and tailor methodologies and frameworks to address application dependencies and enforce best practices across diverse technologies.

This quadrant assesses **pan-European** providers of application development outsourcing services that **integrate GenAI** into the **strategic planning, execution and business integration** of their **entire** application services **organization**.

Oliver Nickels

Definition

This quadrant evaluates providers offering AI-based application development outsourcing services across various technologies and industry verticals. It considers outsourcing contracts with large delivery capacities that typically span three to five years and cover infrastructure, data and AI requirements. These providers are adept at managing large and intricate application landscapes that span multiple geographic locations and technological layers. They often possess extensive consulting expertise, methodologies and frameworks, and strong partnerships to implement best practices such as CI/CD pipelines, AI integration and DevOps. These providers utilize discovery tools to analyze application dependencies, identify potential issues, enforce best practices and manage code optimization. They also employ technologies such as ML, NLP and AI and GenAI tools throughout the application lifecycle, including self-learning systems that enhance performance over time.

Eligibility Criteria

1. Ability to manage **over 20 squads for a single client** or scale up to more than 1,000 developers working simultaneously on several projects
2. Ability to **rapidly scale** and add more than 100 developers in a week to meet clients' demands
3. Comprehensive **application development framework** covering development process management, resource allocation, portfolio management, backlog prioritization, Agile methods, system integration, application modernization and consulting services
4. **AI- and GenAI-based accelerators,** tools and solutions to optimize development cycles
5. **AI partner network** to integrate, use and optimize AI-based tools and small or large language models, including infrastructure and data partnerships
6. Comprehensive set of **off-the-shelf tools,** developed in-house or in collaboration with third parties, that are deeply integrated into the ADM framework offered
7. Certifications to **transform and deploy Agile teams** under open frameworks such as Scaled Agile Framework (SAFe) and Large-Scale Scrum (LeSS)
8. **Certified experts** in Scrum, Kanban, Lean development or other Agile methodologies
9. **Training and education** offerings for developers of AI models and optimization of the talent pool to transfer benefits to clients

Observations

The European application development outsourcing market has evolved structurally over the past two years, driven by the mainstreaming of GenAI, increasing regional compliance demands and shifting toward outcome-based delivery.

Clients across industries no longer view GenAI as a standalone initiative. GenAI plays a central role in the scope, delivery and scalability of ADM from code generation and test automation to architecture analysis and documentation. Providers have responded by reorganizing delivery teams, introducing digital coworkers and establishing guardrails for secure, compliant GenAI usage across Europe's diverse regulatory environments.

Client expectations are simultaneously rising. They demand region-specific engagement models that combine proximity, sector knowledge and support for cloud sovereignty. GenAI must coexist with security and sovereignty, accelerating transformation without breaching data residency boundaries or governance frameworks.

The European AI-driven ADM market is defined by the capability to embed intelligence into every delivery phase, align with industry-specific compliance and deliver measurable business value in regionally nuanced ways.

Accenture and Capgemini continue to lead with deep investments in GenAI-enabled delivery models, supported by industrialized platforms and local engagement. Atos Group has regained leadership by focusing on structured modernization and AI augmentation. NTT DATA emerges as a Rising Star, driven by its consultative approach, AI maturity frameworks and increased traction in the DACH and Southern European regions.

From the 127 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture blends GenAI, sovereign AI platforms and cloud-native delivery to support scalable modernization within complex environments, ensuring regulatory alignment and operational continuity.

Atos

Atos Group focuses on compliance-focused modernization, combining sovereign-cloud architectures, structured GenAI enablement and AI-augmented engineering to support secure, controlled transformation across enterprise estates.

Capgemini

Capgemini delivers AI-driven application services through verticalized GenAI solutions, responsible AI frameworks and secure compliance architectures. Its sector focus, mainframe modernization tools and local delivery enable efficient and regulated digital transformation.

cognizant

Cognizant combines proprietary AI platforms, embedded security and strong cloud partnerships for AI-native application development. Its industry-focused accelerators, regional hubs and governed adoption frameworks enable scalable modernization across complex enterprise landscapes.

Deloitte.

Deloitte blends consulting, AI platforms and engineering services to deliver AI-driven applications, at scale. Its Zora AITM and AI Assist frameworks support secure, role-based automation, while its industry playbooks and Agile engineering models ensure compliant modernization for complex enterprises.

DXC TECHNOLOGY

DXC Technology combines legacy system expertise, modular GenAI platforms and secure delivery frameworks to enable risk-managed application modernization. Its platform-first strategy, AI-driven automation and nearshore delivery centers support compliance-focused transformations, at scale.

HCLTech

HCLTech delivers AI-driven application development through integrated automation platforms, modular cloud-native delivery and structured GenAI adoption. Its industry playbooks and governance frameworks support scalable modernization for clients in regulated environments managing legacy systems.

Infosys

Infosys delivers AI-driven application development through its product-centric Digital Operating Model, bringing together intellectual property assets, modular accelerators and strategic consulting. Its AI-augmented delivery supports scalable modernization for clients balancing compliance and legacy transformation.

TCS

TCS delivers AI-driven application development using modular engineering platforms, embedded GenAI agents and domain-specific delivery frameworks. Its approach, combining human expertise with AI, and resilient architectures support scalable modernization for clients across the finance and manufacturing industries and the public sector.

T-Systems

T-Systems combines sovereignty-focused delivery, embedded AI development assistants and domain-specific modernization frameworks to support secure, compliant and scalable application development. It leverages its capabilities to support clients in the regulated public sector and in the infrastructure and manufacturing industries.

Wipro

Wipro applies a modular, platform-led approach to application development and outsourcing, integrating GenAI accelerators and security frameworks into Agile delivery. Its ai360 strategy, combined with industry-specific blueprints and strong compliance capabilities, supports controlled modernization for European clients in regulated industries.

NTT DATA

NTT DATA (Rising Star) takes a governance-focused, AI-maturity-aware model to application development and outsourcing, supporting sustainable modernization through secure AI integration, modular GenAI enablement and phased delivery. Its advisory-first approach addresses complex regulatory needs in the enterprise IT landscape of Europe.

Leader

"Cognizant demonstrates expertise in AI-driven application development outsourcing, combining proprietary AI platforms, secure DevSecOps practices, cloud-native accelerators and regional delivery hubs to enable efficient, modern application development."

Oliver Nickels

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 336,800 employees across over 50 countries. In FY24, the company generated $19.7 billion in revenue, with Health Sciences as its largest segment. Cognizant has a strong ADM presence in Europe, delivering AI-infused application development services by combining regional scale, vertical expertise and platform innovation. The company leverages proprietary GenAI platforms such as Flowsource™ and Neuro® AI to accelerate software delivery and modernize legacy estates. Additionally, strategic alliances with cloud and AI hyperscalers enhance its ability to deliver AI-native application development capabilities across industries.

Strengths

Full-stack AI platforms for modernization: Cognizant's application services are anchored in proprietary AI platforms such as Neuro® AI, Flowsource™ and Neuro® ITOps. They bring together GenAI, automation and telemetry to optimize software development — from design and code generation to release quality. This approach enables clients to modernize legacy environments, while maintaining oversight on code quality, development velocity and productivity.

Governed AI adoption and DevSecOps integration: Cognizant integrates security and compliance within its DevSecOps pipelines, embedding vulnerability management, identity governance and cloud-native controls into application delivery. Enterprise clients benefit from structured advisory services and its secure-by-design development approach, particularly important for regulated industries in Europe requiring continuous alignment with security guidelines.

Cloud partnerships and local enablement models: Cognizant leverages partnerships with AWS, Microsoft, Google Cloud and NVIDIA to support AI-native application development, using prebuilt accelerators and industry-specific LLMs. Combined with nearshore delivery hubs and regional consulting overlays, its approach supports rapid prototyping and governed scaling, especially for hybrid cloud and industry-specific needs.

Caution

Cognizant's proprietary frameworks are advanced, but clients may need to examine how its Neuro® AI suite and industry-specific GenAI accelerators integrate with their existing cloud ecosystems and vendor platforms across Europe's fragmented IT estates.

Appendix

The ISG Provider Lens® 2025 – AI-driven ADM Services study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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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 October 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

Lead Author

Oliver Nickels

Principal Analyst and Executive Advisor

Oliver Nickels has in-depth technical and business knowledge and more than 25 years of experience as management consultant, IT-analyst, marketing manager, and start-up entrepreneur to contribute to ISG customer projects. His focus areas are Organizational Change through digital & AI-based technologies, AI-driven ADM, Mainframe Modernization and the Digital Customer Journey.

Oliver works as free-lance consultant to help ISG customers with all issues related to the digital customer journey and digital marketing. Before, Oliver worked many years in various national and international roles for a leading global IT company, in his last position as digital marketing manager with responsibility for the digital customer communications of a business unit and as advisor for the management board.

Oliver holds a degree in computer sciences of the University of Bremen.

Research Analyst

Vartika Rai

Senior Research Analyst

Vartika Rai is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on AI-driven ADM Services and the SAP Ecosystem. She has also co-authored the Analytics Services Study. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.

Study Sponsor

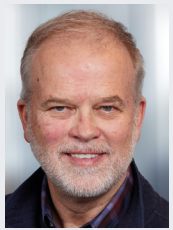
Heiko Henkes

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.

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.

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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