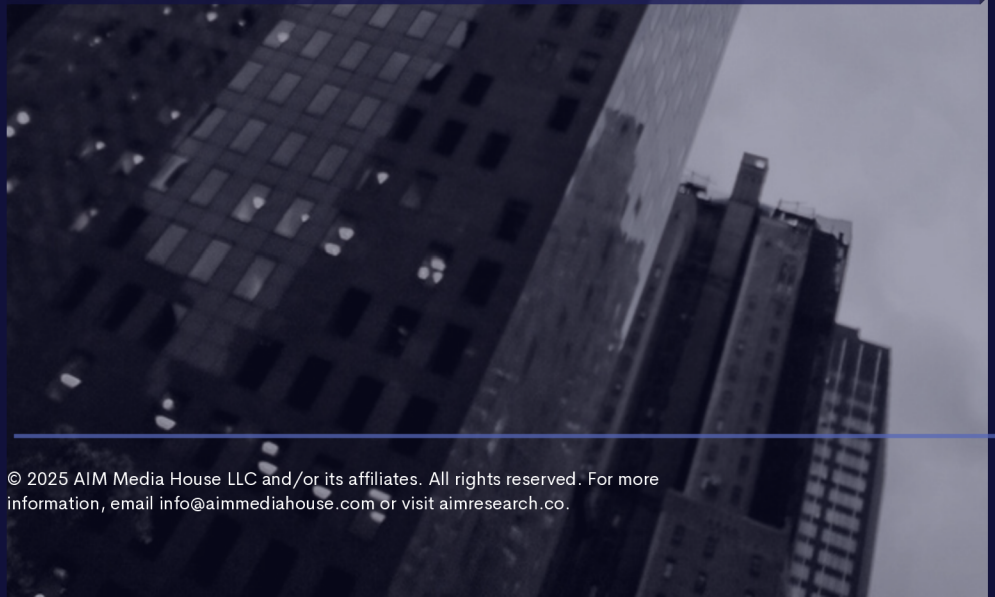
AIM RESEARCH

AIM Research
Penetration Maturity (PeMa) Quadrant

Top Generative AI Service Providers 2026

PeMa Guide



Dec 2025

AIM RESEARCH

Organisations across the world utilize us for advice and tools to lead their digital transformation using data.

Gain insights, advice and tools to embed AI within your organisation. Equip yourself better to make decisions on AI capabilities

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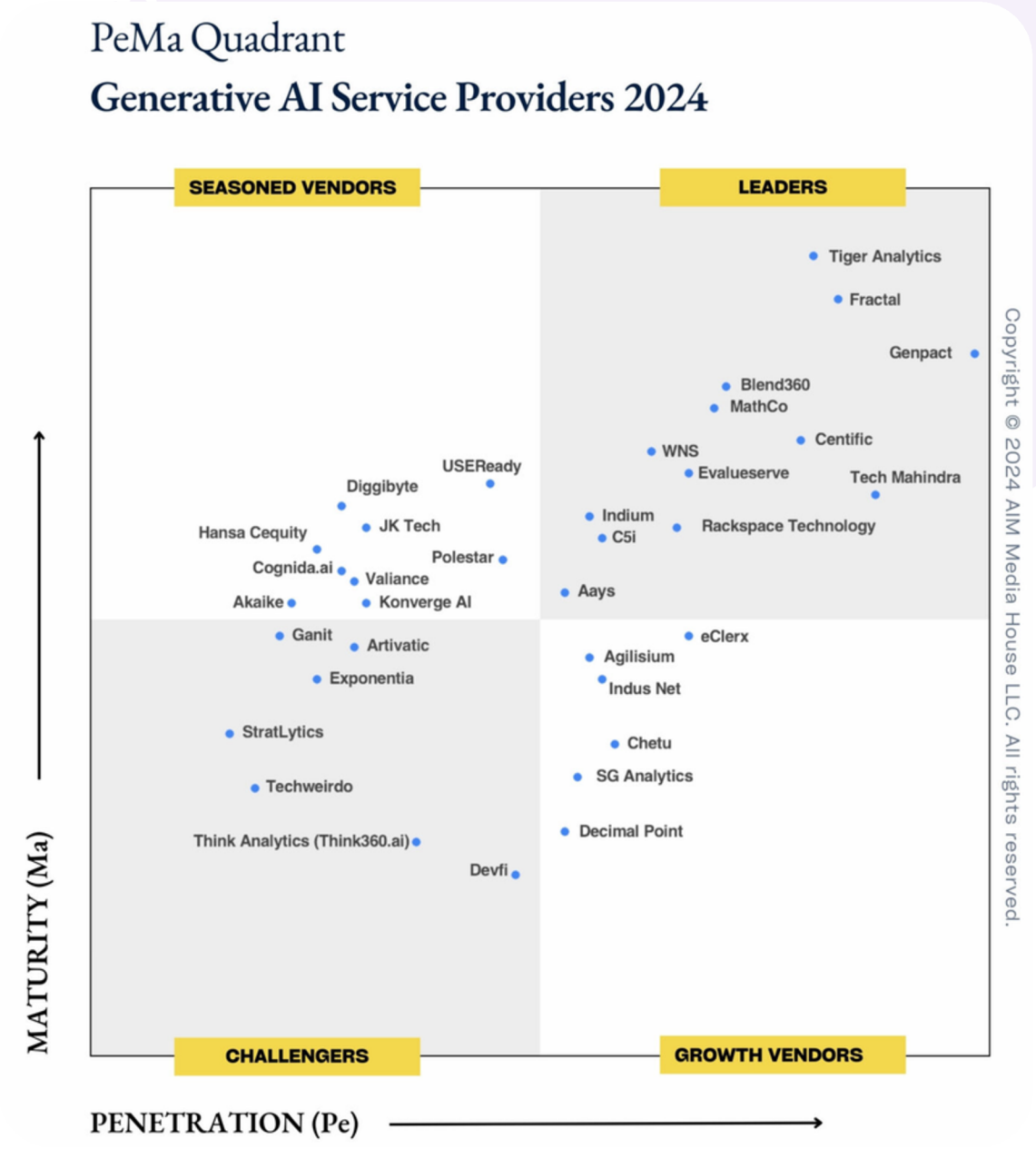
Introduction

AIM RESEARCH

PeMa (Penetration & Maturity) Quadrant

AIM Research's Penetration and Maturity (PeMa) Quadrant for Generative AI Service Providers is a reliable industry standard to evaluate vendor competencies and strategies, and aid businesses in choosing the most suitable vendor aligned to their business needs. Through an exploration of market dynamics and vendor profiles, we provide a comprehensive map for navigating the Generative AI landscape, ensuring that organizations can harness the full potential of Generative AI to transform their operations and stay competitive in the digital age.



PeMa Quadrant Scope and Methodology

- The AIM Penetration and Maturity (PeMa) Quadrant is aimed at evaluating Data and AI vendors' capabilities across the spectrum. By focusing on two crucial dimensions: Penetration, which assesses the extent of market adoption and reach, and Maturity, which evaluates technological advancement, AIM Research offers an insightful analysis of vendors.

- This dual-axis evaluation not only highlights each company's unique approach to delivering world-class products and services but also categorizes them into four distinct segments: Leaders, Seasoned Vendors, Challengers, and Growth Vendors. Each segment signifies a different stage of evolution and market impact.

- Vendors are assessed on critical aspects such as company growth, breadth of offerings, customer confidence, market presence, platform solution maturity, tech advancement, recent activity, and ease of use.

- It is important to note that the PeMa Quadrant analysis is primarily based on responses submitted by the participating vendors through the PeMa questionnaire, briefing calls, and feedback from their clients. This information will also be supplemented by secondary research.

- Participating vendors are asked to share at least two client client references per region (North America, Latin America, Europe, Asia-Pacific, Middle East & Africa) for recent Generative AI projects. AIM Research then collects structured feedback from these clients across parameters such as problem understanding, solution effectiveness, execution quality, business impact, communication, overall satisfaction, likelihood to recommend, and suggested improvements.

OUTCOMES & BENEFITS

BENEFITS FOR TECH END USERS (BUYERS, CIOS, IT LEADERS)

- Informed Decision-Making. Helps evaluate and shortlist vendors based on objective criteria like ability to execute and completeness of vision.
- Market Landscape Clarity. Offers a high-level view of how vendors compare across a market.
- Risk Mitigation. Reduces the risk of selecting underperforming or misaligned vendors by understanding their strengths and cautions.
- Future Roadmap Alignment. Assesses whether a vendor's vision aligns with the buyer's long-term technology goals.
- Negotiation Leverage. Supports stronger vendor negotiations by using quadrant findings to back decisions and pricing discussions
- Peer Validation. Reinforces internal decisions with third-party validation, making it easier to gain leadership or board buy-in.

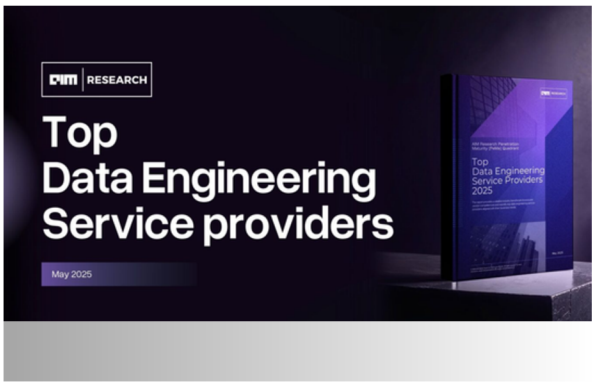
BENEFITS FOR VENDORS (TECH PROVIDERS)

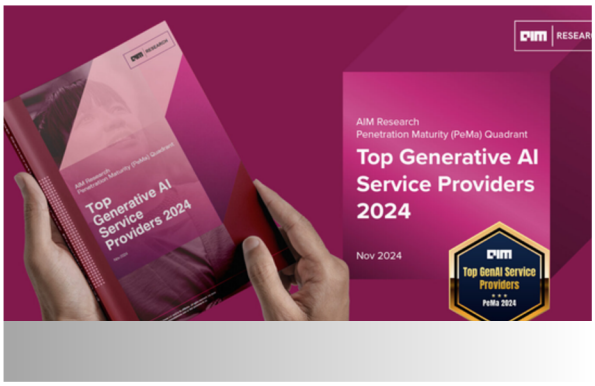
- Market Visibility & Credibility. Being included in the quadrant enhances credibility and builds trust with prospects and partners.
- Competitive Benchmarking. Offers insights into how the company stacks up against key competitors in capabilities and vision.
- Sales Enablement. Acts as a powerful marketing and sales tool—especially for those placed in the Leaders or Visionaries quadrant.
- Customer Confidence. Reassures current and potential customers of the vendor's stability, strategy, and execution capability.
- Product & Strategy Validation. Serves as a third-party validation of the company's roadmap, market understanding, and innovation efforts.
- Investor & Partner Engagement. Influences investor perception and strengthens partnership discussions by showcasing independent analyst recognition.

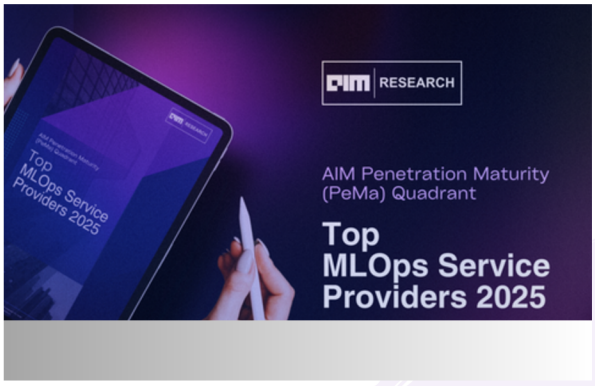
PAST

PeMa Quadrant Reports

Explore the past PeMa Quadrant reports here







Click on interested images to explore further

OVERVIEW

Generative AI Service Providers PeMa Quadrant

DEFINING GENERATIVE AI SOLUTIONS

A Generative AI solution uses foundation models (such as language, vision, or multimodal models) to generate or transform content, reason over information, or support decision-making. These solutions may operate as standalone systems or be integrated into business workflows, applications, or products, and can range from assistive capabilities to automated, multi-step executions (agentic system).

WHAT COUNTS AS A GENERATIVE AI PROJECT?

- Generative AI solutions may range from single-step, human-in-the-loop assistance (for example, drafting, summarization, or code suggestions) to more automated or multi-step workflows, including embedded assistants or agentic systems

Services offered to businesses/enterprises are generally characterized by:

- Use of organizational, application, or domain context, including relevant data, systems, or tools, where applicable
- Repeatable and persistent usage patterns, whether as workflows, features, or standalone capabilities, rather than one-off prompts or isolated experiments
- Operational reliability, safety, and governance appropriate to the deployment context
- Measurable business impact, such as productivity gains, cost reduction, revenue growth, or improved customer experience

Projects do not qualify as Generative AI when they do not involve generating new content or responses using foundation models as a core part of the solution.

SERVICES **LIFECYCLE**

Service Category	Vendor role in lifecycle	Type of service (indicative offerings)
1. Strategy & Advisory	Defines why, where, and how GenAI creates value; sets guardrails and investment priorities.	• Organization readiness assessment • Use-case strategy and portfolio design • Value/ROI modeling • Change management
2. Data, Knowledge & Platform Foundations	Prepares the data, infrastructure, and enterprise knowledge layer needed for GenAI (RAG/Document intelligence)	• Data engineering & quality • RAG / knowledge engineering • Vector DB and embedding pipelines • Cloud, architecture & security setup • Policy, access, compliance
3. Model Engineering & Customization	Builds or customizes the core models that power GenAI applications.	• Base model selection (open source / proprietary) • Fine-tuning & supervised training • Prompt frameworks & guardrail systems • Multimodal model extensions • Synthetic data generation
4. GenAI Application & Agent Development	Creates enterprise-grade GenAI systems, assistants, agents, and workflows.	• LLM app development (chat, search, copilots, etc.) • Autonomous/agentic workflows • Tool integration & API orchestration • Domain-specific copilots (marketing, ops, sales, HR)
5. Deployment, LLMOps	Operationalizes GenAI systems at scale with reliability, observability, and governance.	• CI/CD pipelines for GenAI • LLMOps (prompt, data, and model monitoring) • Serving, scaling & cost optimization • Security, auditability & traceability • API and workflow integration
6. Managed Services	Ensures long-term value realization and ongoing model evolution.	• User training and enablement • Change management & adoption programs • KPI and business impact tracking • Model refresh, drift monitoring, and tuning • Managed GenAI operations as a service
7. Platform, Accelerators & Tools	Builds reusable and/ modular assets in-house	Ingestion, RAG, embeddings, knowledge graphs, fine-tuning, optimization, evaluation, agents, copilots, multimodal, connectors, LLMOps, governance, runtimes, control towers.

VENDOR SELECTION CRITERIA

The Generative AI Service Providers PeMa Quadrant (1/2)

VENDORS MUST MEET THE FOLLOWING CRITERIA TO PARTICIPATE IN THIS PEMA QUADRANT.

1. Company Revenue & Geographical Presence

- Vendors must have a minimum overall company revenue of USD 1 million in the last financial year to be eligible for participation in the PeMa Quadrant for Generative AI Service Providers.
  - Vendors may be grouped or segmented into separate quadrants based on overall company revenue: Large (>USD 1B), Medium (USD 100M–1B), and Small (<USD 100M).
- Pursuant to meeting the revenue criteria as mentioned above, the vendor shall be included in the current study even if it is operational and has clients in just a single region. (Definitions of regions are provided in the subsequent pages).
  - After RFI responses are received from all participating vendors, and subject to vendor confirmation, we may also conduct geography-specific PeMa Quadrant analysis (e.g., North America, Europe, Asia-Pacific) in addition to the global study.

2. Service-Based Delivery Model

- The vendors must deliver Generative AI services through consulting, implementation, and managed service models.
- Platform or accelerator capabilities that streamline development and deployment and may be offered through subscription or licensing, complemented by services layered on top.

3. Proven Delivery

- Demonstrated capability in delivering GenAI solutions across key use-case families such as customer engagement, content generation, decision support, automation, and forecasting.
- Proficiency in developing, customizing, and deploying GenAI solutions using foundation models, RAG, agents, and robust LLMOps for secure, scalable enterprise adoption.
- Types of solutions considered for the use cases: Generative text, vision, and audio models; retrieval-augmented generation; agentic and autonomous systems; multimodal reasoning; and domain-customized LLMs

VENDOR SELECTION CRITERIA

The Generative AI Service Providers PeMa Quadrant (2/2)

VENDORS MUST MEET THE FOLLOWING CRITERIA TO PARTICIPATE IN THIS PEMA QUADRANT.

4. Team Strength & Talent

- Vendors should maintain specialized GenAI teams comprising LLM engineers, RAG specialists, ML engineers, data scientists, and domain experts with proven experience and certifications.

5. Geographic Delivery Capability [Global Study]

- Vendors must have the ability to deliver services across single or multiple geographies based on client presence [e.g., US, UK, India, etc.]

EVALUATION **CRITERIA**

MARKET PENETRATION INDEX:

No	Index	Representative Questions / Indicators	Weightage
1	**Delivery Scale**	• GenAI services and solutions coverage across GenAI lifecycle stages • GenAI projects delivered (last 12 months) • PoC-to-production conversion rate • GenAI delivery team size	High (25%)
2	**Financial Health**	• GenAI revenue by financial year • GenAI revenue as a percentage of total services revenue	High (20%)
3	**Growth**	• YoY growth • Planned net new GenAI hires	Medium (15%)
4	**Customer Confidence**	• Active GenAI clients • Fortune 500 GenAI clients • Repeat Business • GenAI billing rates	High (20%)
5	**Company Outreach**	• Industries served & GenAI revenue contribution by industry • Markets served & GenAI revenue contribution by geography • GenAI go-to-market approach • Partnerships	High (20%)

EVALUATION **CRITERIA**

TECHNOLOGY MATURITY INDEX:

No	Index	Representative Questions / Indicators	Weightage
1	**Work Delivery**	• Agentic versus assistive workload mix Assistive and embedded workload breakdown • Case studies • Client references • Degree of industry-embedded GenAI solutions • GenAI engagement models	High (30%)
2	**Tech Advancement**	• Tech stack, USP • Proprietary GenAI accelerators and platforms • Modular and future-proof GenAI architecture design • Model evaluation and testing frameworks • Prompt and output governance processes • GenAI Center of Excellence CoE	High (25%)
3	**Value Realization**	• Recovery of value from underperforming pilots and value realization in use cases • Cost management in large-scale GenAI deployments • Security, governance, and compliance controls	High (20%)
4	**Employee Maturity**	• Training and upskilling approach • Certified engineers • Billing GenAI resources	Medium (15%)
5	**Support Infra**	• R&D Budget • Acquisitions	Medium (10%)

SCORING **METHODOLOGY**

Scoring

- Vendor responses are first assigned scores based on predefined evaluation criteria for each question.

Weighting:

- Each question is assigned a weight based on its importance. These weights are applied to the scores to get weighted scores.

Normalization:

- The weighted scores are then normalized to a 0–1 scale, allowing fair comparison across vendors and dimensions.

PeMa Scores:

- Normalized scores are averaged separately across Market Penetration and Technical Maturity dimensions.

Quadrant Mapping:

- Vendors are plotted on the PeMa Quadrant based on their final Penetration and Maturity scores.

VENDOR **CLASSIFICATION**

AIM RESEARCH CLASSIFIES VENDORS BASED ON THE FOLLOWING PARAMETERS:

1. **Revenue of the Company (US$)**
2. **Geographic Location**

COMPANY'S OVERALL REVENUE

VENDOR TYPE	OVERALL COMPANY REVENUE
ENTERPRISE	>1 billion USD
MID-MARKET	100 million – 1 billion USD
SPECIALIZED FIRMS	<100 million USD

VENDOR **CLASSIFICATION**

GEOGRAPHIC LOCATION

REGION	REGIONS SERVED / CLIENT DELIVERY LOCATIONS
NORTH AMERICA	**USA, Canada, Mexico**
LATIN AMERICA	**Brazil, Argentina, Colombia, Chile, Costa Rica**
EUROPE	**UK plus countries in the EU**
ASIA-PACIFIC	**India, Philippines, Malaysia, Singapore, Vietnam, Thailand, Indonesia, Australia, New Zealand**
	China, Hong Kong, Taiwan, Japan, South Korea
MIDDLE EAST & AFRICA	**UAE, Saudi Arabia, Egypt, South Africa, Israel, Kenya, Nigeria, other countries in the African continent**

PARTICIPATION **GUIDELINES**

Who should respond

- The survey should ideally be completed by leaders in Generative AI or AI – including Delivery Heads, Practice Leads, Pre-sales, Sales, or Strategy Leaders who have visibility into the company's capabilities, client engagements, and growth plans.

Single submission per organization

- We request one consolidated response per company to ensure consistency. Multiple stakeholders can collaborate, but the final submission should come through a single point of contact.

Voluntary but encouraged:

- Participation is free of charge and offers visibility in the PeMa Quadrant and related insights.
- Participating vendors are not permitted to recreate the announcement, in text or image form, without obtaining a license for internal or external promotions. A licensing fee applies if you choose to use the PeMa Quadrant, award badge, or report externally for marketing purposes.

Response format:

- Responses must be submitted via the online survey link provided. Supporting documents (optional) can be emailed to the research team if needed.

Evaluation approach

- Final analysis will be based on a combination of survey (RFI) responses and briefing calls with the participating vendors.

PEMA STUDY **TIMELINE**

START WEEK: 17 DEC 2026

PHASE	DURATION	DESCRIPTION
Form Launch & Vendor Outreach	**3–4 WEEKS**	Survey form goes live. Initial communication begins, including clarification sessions to guide vendors through participation.
RFI Submission	**4–6 WEEKS**	Vendors complete and submit the Request for Information (RFI), detailing their capabilities and experience.
Briefing Calls	**3 WEEKS**	One-on-one calls conducted to elaborate on RFI responses, validate data, and gather deeper insights.
Analysis & Report Preparation	**2–3 WEEKS**	Vendor data is evaluated across PeMa metrics to determine quadrant placement. Insights are compiled & the final PeMa Quadrant & vendor profiles are published.
Debriefing	**1–2 WEEKS**	Survey form goes live. Initial communication begins, including clarification sessions to guide vendors through participation.

OVERALL DURATION: 3–4 MONTHS

INVITED PLAYERS (REPRESENTATIVE LIST)

Note: The current list of invited players is an indicative representation based on preliminary research. It will be expanded as the study progresses to ensure comprehensive market coverage.

Accenture	Deloitte	Infosys
Alten	Dentsu	KPMG
Apex Systems	DXC Technology	Kyndryl
Atos	EPAM Systems	LTIMindtree
Avanade	EXL Service	Merkle
Bain & Company	EY	Mphasis
BearingPoint	FPT Software	Nagarro
Booz Allen Hamilton	Fujitsu	NEC Corporation
BCG	Genpact	NTT Data
Capgemini	GlobalLogic	Orange Business
CGI	Guidehouse	Persistent Systems
CitiusTech	HARMAN	Publicis Sapient
Coforge	HCLTech	PwC
Cognizant	Hitachi Digital Services	Rackspace Technology
Concentrix	IBM	SoftwareOne

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T-Systems	Aays	Decimal Point Analytics
TCS	Acuity	Devfi, Inc
Tech Mahindra	Agilisium	Diggibyte
UST	Ascendion Inc.	eClerx
Unisys	Aspire Systems	Encora
Wipro	Aventra Group	Evalueserve
WNS	Axtria	Firstsource
Tiger Analytics	Birlasoft	Fractal Analytics
TO THE NEW	Blend360	Geniusee
TransOrg Analytics	Brillio	Hansa Cequity
Tredence	C5i	Happiest Minds
USEReady	Centific	Hexaware
Valiance Solutions	Chetu	Hexaware
Virtusa	Cyient	HTC Global Services
Xebia	Datamatics	IGT Solutions

INVITED PLAYERS (REPRESENTATIVE LIST)

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Impetus	Mu Sigma	Akaike Technologies
Indegene	N-iX	Artivatic
Indium Software	Polestar Analytics	Cognida.ai
INT.	Quantiphi	Ganit Business Solutions
Infocepts	Quantium	Konverge AI
Infogain	Searce Inc	Minfy
JK Tech	SG Analytics	Neoware
LatentView Analytics	Sigmoid	StratLytics
Marlabs	Team Computers	Think360.ai
Mastek	Techvantage Analytics	
MathCo	Zensar Technologies	
Movate	ZS	

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Organisations across the world utilize us for advice and tools to lead their digital transformation using data.

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