ISG Provider Lens®

Guidewire Ecosystem Services

Guidewire Services

A research report comparing provider strengths and the advantages of Guidewire service providers



Customized report courtesy of:

pwc

QUADRANT REPORT | OCTOBER 2026 | GLOBAL

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Report Author: Manav Deep Sachdeva

Guidewire services compete on continuous cloud value, insurance expertise and AI-enabled delivery

This ISG Provider Lens® study assesses service providers supporting insurers across the Guidewire lifecycle, including advisory, implementation, cloud migration, digital experience, quality engineering, application management and AI-enabled optimization. The assessment examines how providers combine insurance expertise, platform capabilities, delivery scale, proprietary assets and ecosystem relationships to help P&C insurers modernize existing legacy systems, improve operations and sustain value after moving to Guidewire Cloud.

Market Context

P&C insurance technology investment is shaped by converging economic, operational and regulatory forces. Insurers are entering a period of increasing competition, margin pressure and heightened uncertainty while continuing to manage catastrophe exposure, reserve volatility, distribution changes and rising operating costs. These conditions intensify scrutiny of large core transformation programs and increase pressure to demonstrate measurable value from core platforms, AI and analytics, and digital investments.

Many early Guidewire adopters now operate heavily customized on-premises environments with accumulated technical debt, aging integrations, incomplete documentation and large regression suites. Moving these estates to the cloud requires more than upgrading platform code. Insurers must remediate integrations, unwind unnecessary customization, rationalize product models, modernize digital channels, redesign testing practices and replace legacy data and reporting components. ISG client interactions consistently reveal that integration remediation, data reconciliation and pre-cloud readiness are among the most challenging parts of these programs.

Guidewire providers turn **platform** investments into **measurable value** and **sustainable growth.**

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AI adds another layer of disruption. The market is progressing from generic copilots and isolated PoCs toward AI-assisted software engineering, test automation, document processing, claims support and underwriting intelligence. However, assistive AI remains more prevalent than autonomous agentic execution because insurers still need human oversight, controlled access to customer data and reliable validation of outputs. Legacy architectures and fragmented data foundations also limit how quickly insurers can embed AI into core business processes.

Regulatory expectations are strengthening alongside technology adoption, as regulators globally expect insurers to maintain governance, risk management and internal controls for AI systems used in consumer-impacting decisions. It emphasizes accuracy, transparency, accountability and protection against unfair discrimination, including when insurers use externally supplied AI solutions.

Regional maturity remains uneven. North America has the deepest concentration of Guidewire programs, certified professionals and reusable insurance content. The U.K., continental Europe, Australia and Japan are attracting additional investment, but local regulatory knowledge, language coverage and platform talent vary considerably. This asymmetry affects delivery models, localization requirements and the availability of senior architects outside established markets.

Enterprise Priorities

Insurers are responding to market forces by changing how they scope transformations, shortlist partners and govern delivery. A few key priorities are listed below:

1. Convert cloud migration into business value

Insurers increasingly expect providers to identify which customizations should be removed, which cloud capabilities should be adopted and how product, claims, billing and digital processes should evolve after migration. Pre-cloud remediation, Advanced Product Designer (APD) adoption, cloud-compliant integration, release impact analysis and post-cloud feature planning are becoming core selection criteria.

Insurers are also evaluating whether a proposed migration creates a sustainable operating model. This includes readiness for frequent platform releases, automated regression testing, technical debt management and continuous enhancement delivery.

2. Reduce implementation and operational risk

Data conversion, financial reconciliation, integration dependencies and incomplete legacy documentation remain major sources of program risk. Insurers are placing greater emphasis on automated validation, phased cutover, archive strategy, defect prevention, cloud assurance and production readiness.

Insurers inheriting high production backlogs or recurring incidents increasingly seek partners with structured triage, root-cause elimination and proactive monitoring models. The ability to stabilize an environment quickly and then establish predictable release governance is becoming a meaningful differentiator.

3. Accelerate product, state and digital expansion

Insurers want core modernization to shorten the time required to launch products, enter jurisdictions and improve agent and customer journeys. This is especially relevant where bureau content, forms, rating, state variation and product complexity create delivery bottlenecks.

As a result, buyers are evaluating providers' depth in APD, standards-based templates, product rationalization, rules and forms transformation, rating integration and multi-release rollout. Digital strategy is also becoming more nuanced. Some insurers prefer native Guidewire capabilities such as Jutro, ProducerEngage and CustomerEngage, while others want headless or composable experiences around Guidewire as the system of record.

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4. Scale AI with credible governance and outcomes

Insurers are interested in AI across platform delivery, operations and application support. However, they are also becoming more disciplined in distinguishing among pilots, production-ready capabilities and scaled deployments.

Selection criteria increasingly include data security, model choice, auditability, explainability, human approval, output accuracy and integration with existing developer and operational tools. Insurers also want each AI use case tied to a measurable result, such as reduced regression time, greater migration accuracy, faster document intake, fewer defects or improved support productivity.

5. Balance specialist expertise with delivery scale

Large insurers need multi-region staffing, architecture governance and enterprise integration capability. Midmarket and regional carriers often prioritize senior attention, P&C specialization, flexible commercial models and lower governance overhead. This creates different shortlist patterns.

Insurers should look beyond total headcount and evaluate the number of named architects, cloud specialists, product SMEs, Jutro professionals, data leads and locally available resources. They should also examine whether a provider's delivery model fits the program's size. For instance, a transformation model built for a global carrier may be too heavy for a smaller insurer.

Provider Dynamics

Providers are adapting their offerings around cloud, AI and lifecycle ownership. The strongest propositions no longer describe Guidewire implementation as an isolated technology project.

From implementation to lifecycle accountability

Leading providers organize services around transformation, growth and run operations. Their portfolios combine advisory, implementation, cloud migration, modernization, managed services and continuous release support. Some providers enter through strategic transformation and remain for application management services (AMS), while others establish credibility through testing, support or stabilization before expanding into migration and implementation.

The distinction matters because the cloud creates an ongoing cycle of release and optimization. Providers that connect implementation decisions with future supportability, feature adoption and release automation offer a more credible lifecycle proposition. Providers that remain concentrated in only one phase may still be effective, but insurers must assign architecture and value realization ownership elsewhere.

Industrialized cloud and migration capabilities

Providers are investing in cloud readiness frameworks, migration factories, automated reconciliation, integration remediation, rules extraction and regression automation. The most practical offerings address the full migration problem: legacy analysis, customization assessment, code and integration conversion, data quality, testing, cutover and post-production stabilization.

Cloud maturity varies; some providers exhibit strong proof across complex full-suite migrations, while others are more established in technical upgrades, AMS or selected modules. Insurers should distinguish between cloud certification, participation in an engagement and accountable delivery ownership. The strongest evidence is a repeatable pattern of responsibility for inception-to-managed services across comparable lines of business and program complexity.

AI is shifting from generic tooling to contextual intelligence

Nearly every provider is introducing AI into the Guidewire lifecycle. The more differentiated approaches combine platform knowledge, insurer-specific code, requirements, architecture, integrations, incidents and testing artifacts through contextual or RAG-based intelligence. Multi-persona coverage across business analysts, architects, developers, testers and support teams is also expanding.

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The most credible current benefits are in bounded engineering activities such as requirements generation, code assistance, test design, defect analysis, document extraction and migration mapping. Broader claims and underwriting agents remain less consistently mature. Leaders will be those that demonstrate reusable governance, production adoption and measurable results rather than the largest catalog of AI concepts.

P&C specialization is becoming a stronger counterweight to scale

Specialist providers exhibit deep knowledge of commercial, specialty, agricultural, mutual and workers' compensation markets. Their differentiation comes from familiarity with bureau content, product structures, forms, rating, state expansion and carrier operating processes. This enables them to compete effectively where practical insurance knowledge and senior attention matter more than total organizational size.

Larger providers offer broader transformation capacity, global delivery reach and access to enterprise data, cloud, cybersecurity, AI and business operations capabilities. However, the value of this scale depends on whether the insurer receives named senior specialists rather than a generic delivery pyramid. The market increasingly rewards providers that combine both dimensions: focused platform and insurance expertise supported by scalable data, cloud and engineering capabilities.

Ecosystem and architecture capabilities are broadening

Providers are positioning Guidewire within a wider ecosystem of portals, content management, communications, payments, CRM, rating, fraud, cloud and data platforms. This supports composable architectures and allows insurers to retain differentiated CX while keeping the core closer to standard configuration.

Yet ecosystem breadth can also introduce complexity. Insurers need clear accountability for APIs, data lineage, security, release compatibility and production support across multiple vendors. Providers that offer many partnerships without a coherent target architecture risk shifting the responsibility for orchestration back to the insurer.

Geographic expansion remains an execution test

Several North America-focused providers are investing in Canada, the U.K., Europe and Australia, while globally scaled providers are building localized capacity in newer Guidewire markets in LATAM and Africa. Investments include local leadership, university programs, lateral reskilling, multilingual AI and regional sandboxes.

These strategies are promising but should not be treated as equivalent to established delivery depth. Insurers should validate local references, regulatory knowledge, language capability and continuity of senior resources. A provider may have global corporate reach while its dedicated Guidewire practice remains concentrated in a small number of countries.

Outlook

Over the next 12 to 24 months, the Guidewire services market will move from migration-centric growth toward continuous cloud value realization. Cloud adoption will remain important, but competitive differentiation will increasingly depend on how well providers help insurers simplify customization, adopt new capabilities, modernize surrounding data and digital environments, and maintain reliable release cycles.

ISG recommends that insurers should:

- Establish business, technology and operational baselines before accepting cloud or AI benefit commitments
- Separate migration completion and post-cloud value realization from the project scope, and assign accountability for both
- Demand production evidence for accelerators and AI assets, including reuse effort, governance and measurable outcomes
- Protect architecture coherence by defining ownership across core, digital, data and ecosystem platforms

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- Match provider scale to program complexity and secure named senior specialists contractually

ISG recommends that Guidewire providers should:

- Turn broad AI catalogs into smaller sets of governed, production-proven capabilities targeting specific value chain areas
- Strengthen next-generation data, Jutro, APD, Pronavigator and Predict skills as demand moves beyond traditional xCenters
- Prepare for UnderwritingCenter and PricingCenter modules as Guidewire trains partners with early access to these newly added capabilities
- Build regional capability through evidence of local delivery, not just sales presence or future pipelines
- Connect transformation advisory more directly to measurable post-go-live outcomes

Large providers are likely to retain an advantage in global transformations requiring broader enterprise capabilities. Focused challengers can gain share where insurers prioritize P&C depth, senior attention, cloud remediation, product rollout and cost-effective managed services. The strongest performers will be those that combine the intimacy and specialization of a focused partner with the governance, architectural breadth and delivery resilience expected from a strategic transformation provider.

Guidewire services are shifting from migration-led transformation to continuous value realization, as insurers demand partners that combine platform expertise, AI-driven innovation and lifecycle accountability to simplify modernization, reduce risk and sustain measurable business outcomes.

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Provider Positioning

	Guidewire Services
Accenture	Leader
Acini	Contender
Alchemy Technology Services	Product Challenger
Aspire Systems	Contender
Birlasoft	Contender
BlitzenX	Contender
Capgemini	Leader
Centric Consulting	Contender
CGI	Leader
Coforge	Product Challenger
Cognizant	Leader

	Guidewire Services
Deloitte	Leader
Endava	Contender
Exavalu	Contender
EY	Leader
GFT	Product Challenger
HCLTech	Leader
Hexaware	Leader
HTC Global Services	Product Challenger
IKOR (x1F)	Contender
LTM	Leader
Netcompany	Contender

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Provider Positioning

	Guidewire Services
Norima Consulting	Contender
PwC	Leader
SBI Technology	Contender
Sollers Consulting	Product Challenger
Stratus, An Infosys Company	Rising Star ★
TCS	Leader
Tech Mahindra	Leader
ValueMomentum	Rising Star ★
Wipro	Contender
Zensar Technologies	Leader

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Key focus areas of the Guidewire Services Ecosystem study 2026 include provider **capabilities, innovation** and **best practices.**

Simplified Illustration Source: ISG 2026

Guidewire Services

Definition

This ISG Provider Lens® study evaluates service providers that deliver end-to-end Guidewire services to the global P&C insurance industry through a unified, single-quadrant lens. It covers the full lifecycle of Guidewire engagements across core InsuranceSuite modules, including PolicyCenter, BillingCenter and ClaimCenter, as well as the recently introduced PricingCenter and UnderwritingCenter, while also assessing Guidewire Cloud adoption and transformation capabilities.

The study reflects the breadth of services aligned to the Guidewire services blueprint, including:

- Consulting and advisory for strategy, roadmap and transformation
- System implementation and integration across complex ecosystems
- Data migration and cloud and platform engineering for Guidewire Cloud Platform (GWCP) enablement
- Managed services, release management, quality assurance and continuous optimization
- Analytics and insights to drive data-led decision-making

It also evaluates cross-cutting capabilities, including digital IP and AI accelerators, change management, training and adoption, and participation in the broader InsurTech and innovation ecosystem.

The study examines providers' expertise in leveraging non-core components, such as Guidewire Jutro, Predict and ProNavigator to enhance digital experience, analytics and intelligent operations. A strong emphasis is placed on configurable Guidewire solutions and accelerators that enable rapid product launches and address complex business challenges.

The report further assesses execution strength across key regions, including North America, the London Market, ANZ and Europe, highlighting providers best positioned to drive agility, innovation and business value through Guidewire.

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Scope of the report

This ISG Provider Lens® quadrant report covers the following one quadrant for services/ solutions: Guidewire Services

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 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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Guidewire Services

Who Should Read This Section

This report is valuable for service providers offering **Guidewire services globally** 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.

Business professionals

Should read this report to understand how providers can help insurers simplify and optimize core insurance processes across policy, billing and claims. The report highlights providers' ability to improve process efficiency, reduce cost-to-serve, enhance staff productivity and align Guidewire-led transformation with business objectives.

Technology professionals

Should read this report to assess providers' capabilities in Guidewire implementation, system integration, cloud and platform engineering, DevOps, testing and release management. The report helps them understand which providers can modernize legacy insurance environments, enable scalable Guidewire Cloud adoption and support complex enterprise ecosystems.

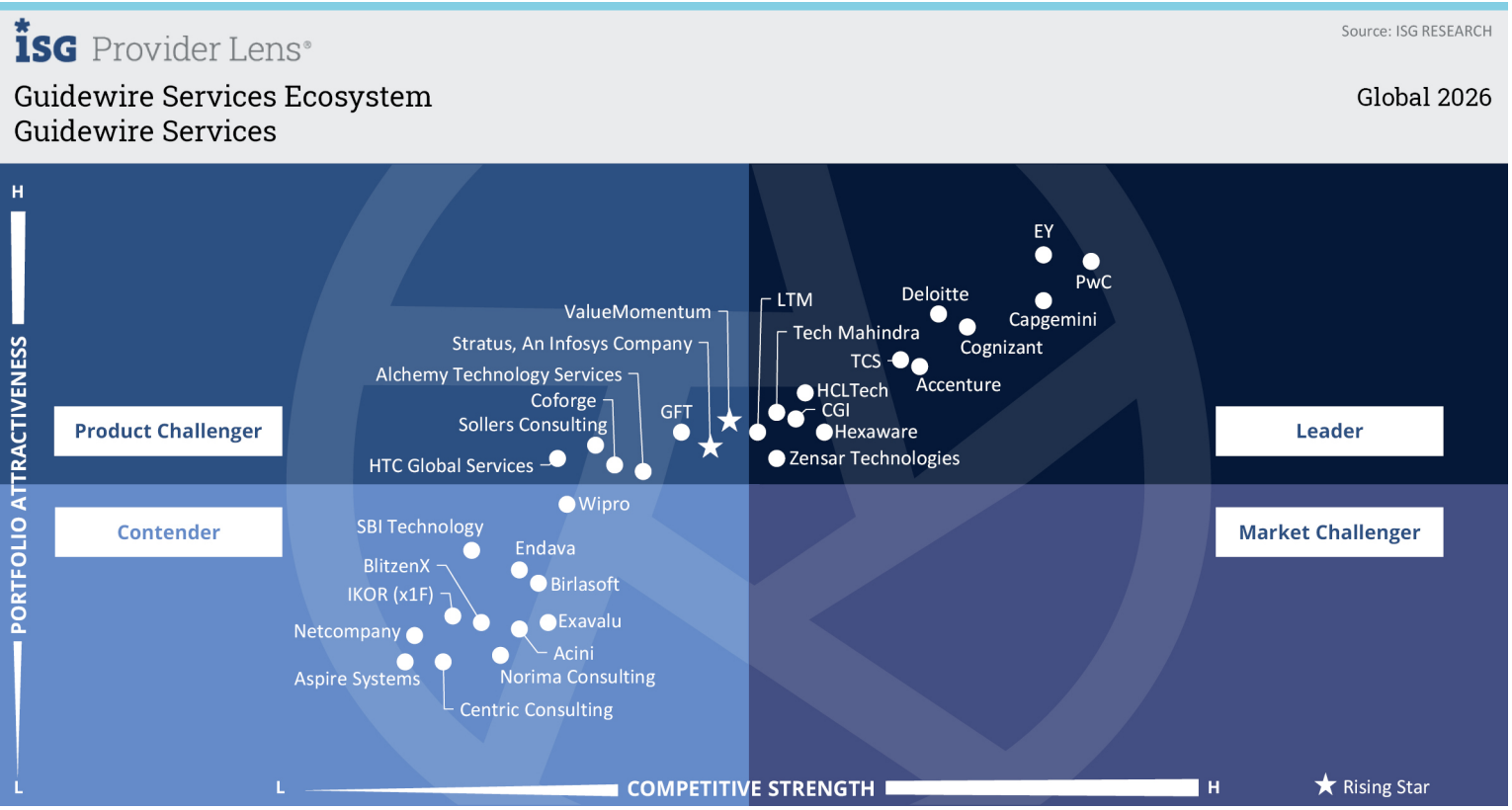
Data and analytics professionals

Should read this report to understand providers' experience in improving data quality, reporting, insights and analytics across Guidewire-enabled insurance operations. The report highlights how providers support better decision-making, operational visibility, KPI tracking and performance improvement through analytics-led capabilities.

Operations professionals

should read this report to assess how providers can help insurers streamline day-to-day insurance operations, improve service quality and enhance business performance. The report supports decision-making on partners that can increase operational efficiency, improve user adoption and maximize ROI from Guidewire investments.

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The quadrant examines how providers help insurers manage **transformation risk,** modernize surrounding **data and digital estates** and establish **reliable operating models** for continuous releases, **optimization** and regulatory control.

Manav Deep Sachdeva

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Definition

The study assesses providers based on the breadth and depth of their services, expertise and proven experience in implementing and managing Guidewire solutions. It considers capabilities across the full services lifecycle, including consulting, implementation, integration, cloud transformation and managed services.

Providers are evaluated on their ability to support diverse lines of business, meet the needs of insurers of varying sizes, from small and midmarket carriers to large global organizations, and deliver outcomes across key regional markets such as North America, Europe and ANZ. The quadrant also reflects providers' proficiency in leveraging Guidewire's core and extended ecosystem to drive business value.

By combining service capabilities with real-world execution experience, this unified lens offers a comprehensive view of providers best positioned to enable successful Guidewire-driven transformation.

Eligibility Criteria

1. Offer strategic **consulting** for Guidewire adoption, including roadmap definition, cloud readiness and business transformation aligned to P&C insurance needs
2. Provide **system implementation** for one or more Guidewire core modules (PolicyCenter, BillingCenter, ClaimCenter, PricingCenter or UnderwritingCenter) or entire suites (InsuranceSuite or InsuranceNow) and **integrate** them into broader **enterprise ecosystems**
3. Demonstrate capabilities in **migrating** legacy systems to the **Guidewire Cloud Platform (GWCP),** including **data migration, DevOps** and **platform engineering**
4. Deliver post-implementation **managed services,** such as **application maintenance, upgrades** and **continuous optimization** in Guidewire environments
5. Exhibit proven experience in **testing** Guidewire deployments, including **automation** and **regression testing**

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Observations

The Guidewire services quadrant reflects a market moving beyond core implementation toward continuous cloud modernization, platform optimization and business value realization. Providers are evaluated on their ability to combine insurance expertise with cloud engineering, data modernization, digital experience, quality assurance, integration and managed services across the platform lifecycle. Compared with last year, positioning has become more fluid. Established providers have strengthened cloud migration, AI-enabled delivery and post-go-live offerings, while focused specialists and midsized challengers have expanded advisory capabilities, certified talent and implementation ownership to compete for larger transformations.

AI features in nearly every proposition, although differentiation depends less on the number of tools presented and more on production adoption, Guidewire-specific context, governance and measurable outcomes. Geographic reach is also changing as North America-focused specialists invest in Canada, the U.K. and Europe, while global firms build localized capabilities in emerging Guidewire markets. The Infosys acquisition of Stratus is the key quadrant-specific M&A development, combining Stratus' specialized Guidewire Cloud and managed services experience with Infosys' scale and broader AI, data and transformation capabilities. Overall, competition is intensifying, with provider standing determined by lifecycle accountability, reusable cloud assets, senior talent availability and the ability to connect platform change with operational and financial outcomes.

From the 46 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

Accenture supports Guidewire-led transformation through its insurance, cloud, data, AI, operations and ecosystem capabilities, enabling carriers to modernize policy, billing, claims and digital functions while improving agility and CX.

Capgemini

Capgemini supports insurers through Guidewire-led modernization programs that connect core platforms, cloud migration, data, digital experience and AI-enabled delivery into broader business transformation agendas across global insurance markets.

CGI

CGI combines Guidewire delivery experience, strong local insurance relationships, cloud transition capability and proprietary accelerators to help insurers modernize core platforms while improving speed, quality and business adaptability at scale.

cognizant

Cognizant supports insurers through Guidewire-led modernization using cloud migration frameworks, marketplace assets, InsuranceNow expertise, domain-led delivery and AI-infused accelerators for implementation, migration, support and post-production optimization across regions and markets.

Deloitte.

Deloitte's Guidewire practice connects implementation, cloud migration, AI, digital experience and insurance process redesign to help carriers modernize policy, billing, claims and related operating capabilities across major regions globally.

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EY supports Guidewire-led transformation through business-led consulting, global delivery centers, AI-enabled innovation, data and ecosystem assets, helping P&C insurers modernize core platforms and operating models at scale.

HCLTech supports insurers through Guidewire-led modernization using migration factories, cloud readiness services, automation-first testing, data migration suites, claims automation assets and AI agents across implementation, integration, release and support functions.

Hexaware differentiates through its Guidewire marketplace contributions, APD and Jutro assets, automation-led testing approach and AI-led claims workflows that improve speed, quality and operational efficiency for insurers.

LTM strengthens its Guidewire position through cloud implementation experience, production-grade AI accelerators, managed services maturity and a lower TCO delivery model suited to insurers seeking agility and sustained platform value.

PwC supports insurers through the full Guidewire lifecycle, from roadmap and implementation to cloud migration, managed services, analytics and AI-led innovation, backed by large, certified teams, reusable accelerators and strong advisory depth.

TCS supports insurers through Guidewire modernization using cloud readiness frameworks, Jutro experience, testing accelerators, data migration capabilities, managed services and insurance solutions for policy, billing, claims and distribution transformation initiatives.

Tech Mahindra combines Tenzing-led consulting depth, Guidewire implementation experience, AI-enabled accelerators and broader insurance delivery capacity to help carriers modernize core platforms and improve operating agility.

Zensar combines Guidewire Cloud migration, lifecycle support, data modernization, integration engineering and AI-native software development lifecycle (SDLC) capabilities to help insurers accelerate cloud adoption, platform optimization and claims modernization.

Stratus, an Infosys Company (Rising Star), combines specialized Guidewire Cloud expertise with Infosys' global insurance scale, partnerships and AI capabilities to support modernization, state rollouts, AMS and platform optimization.

ValueMomentum (Rising Star) supports insurers through Guidewire-led transform, grow and run initiatives, combining P&C domain depth, cloud readiness, product rollout frameworks, state expansion and managed services.

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PwC

Leader

"PwC stands out for its Guidewire Cloud experience, marketplace solutions and global delivery scale, supported by strong collaboration with Guidewire and a broad insurance advisory and technology practice across regions."

Manav Deep Sachdeva

Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated $57.0 billion in revenue. PwC's Guidewire practice combines advisory, cloud migration, integration, data modernization, quality engineering and application evolution services, reinforced by marketplace solutions and AI assets for development, testing and knowledge support. Its global delivery network supports local and multinational programs across North America and Europe, while local teams and acceleration centers extend execution capacity across APAC and LATAM.

Strengths

Deep cloud expertise: PwC has developed one of the most mature Guidewire Cloud practices, supported by experience across multiple Guidewire Cloud releases and a large base of certified practitioners. Its cloud services include readiness, planning, migration, release management, data access, integration, DevOps, security and post-cloud optimization. These services provide insurers a path from legacy modernization to ongoing Guidewire Cloud value realization.

Guidewire marketplace assets: PwC offers configurable Guidewire marketplace solutions and industry-specific assets that speed product launches and simplify implementation, spanning commercial and specialty lines, fraud detection, CRM connectivity, workflow automation and reusable integration patterns. These capabilities help insurers support niche products, specialty business models and emerging risk segments.

AI-enabled delivery and operations: PwC has embedded AI across Guidewire delivery and insurance operations, with proprietary capabilities spanning the full SDLC and agentic workflows, from development and testing acceleration to knowledge management, business analysis and intake automation. These capabilities accelerate delivery while enabling smarter, more scalable insurance operations.

Caution

PwC's strengths are primarily aligned with large, complex transformation programs. Smaller insurers and MGAs should evaluate its managed services, testing and migration capabilities against their requirements for a more cost-effective end-to-end Guidewire partner.

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Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Guidewire Services Ecosystem study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Guidewire Services Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Author



Manav Deep Sachdeva
Lead Analyst

Manav Deep Sachdeva is a Senior Manager and Principal Analyst within the ISG Provider Lens® Research team, where he leads coverage of specialty (verticalized) analytics and AI service providers. He brings over 14 years of experience spanning research, consulting and advisory roles, including his tenure as a Gartner analyst, during which he advised CXOs globally on technology strategy, vendor selection and innovation roadmaps.

Manav has authored several influential research artifacts, including Magic Quadrants, Hype Cycles and decision-making frameworks that enable enterprise leaders to evaluate technologies and prioritize investments with confidence. His expertise spans legacy modernization, data analytics, AI and automation, with a strong focus on translating emerging technologies into measurable business outcomes.

In his previous role, Manav served as a techno-functional consultant at an insurance company, collaborating closely with IT and business leaders while leading innovation and digital sales initiatives.

Enterprise Context Analyst and Global Overview



Riya Tomar
Research Analyst

Riya Tomar is a Research Analyst at ISG, supporting Provider Lens® Ecosystem Studies. She brings over three years of experience in technology research and advisory services. In her current role, Riya contributes to service provider evaluations and market trend analysis. She collaborates with lead analysts to validate data, prepare the Enterprise Context and Global Summary sections and maintain consistency across reports.

Prior to her current role, Riya authored research reports and created custom client presentations for strategic advisory projects, translating complex datasets into actionable insights and delivering high-quality outputs for decision-makers.

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Study Sponsor

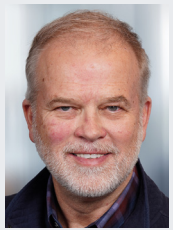


Iain Fisher
Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analyzing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

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

Now as a 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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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.

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