IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment
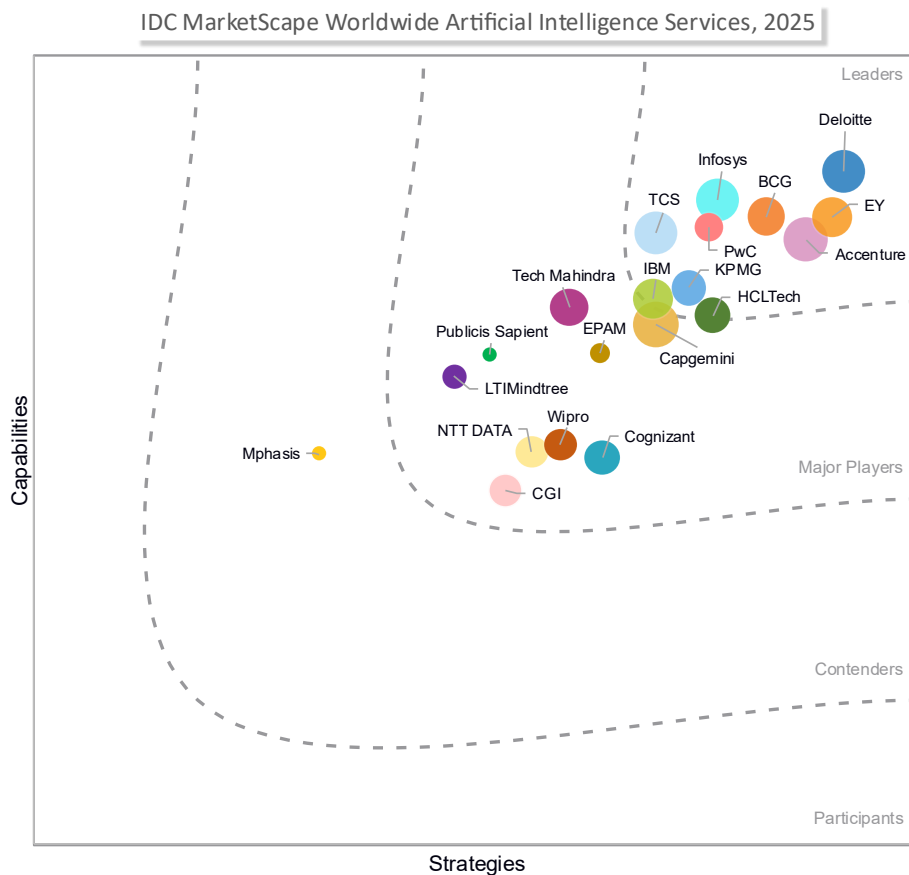
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THIS EXCERPT FEATURES PWC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Artificial Intelligence Services Vendor Assessment

Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment (Doc # US52978525).

IDC OPINION

This IDC study represents a vendor assessment of the 2025 worldwide artificial intelligence (AI) services market through the IDC MarketScape model. This is the fourth iteration of this assessment, and IDC last assessed this market in 2023. With each iteration, we have revised our evaluation criteria and buyer perception survey instrument to refine our assessment methodology and reflect market evolution.

Much has changed in the AI market in the two years since the previous IDC MarketScape assessment on worldwide AI services published, just a few months after ChatGPT captured public consciousness. Potentially transformative enterprise GenAI use cases dominated conversations across industries throughout 2023, and this excitement contributed to the technology rapidly gaining C-suite attention and investment support. In 2024, organization encountered many obstacles to scaling their AI initiatives, such as internal skills gaps, excessive implementation difficulty and cost, misalignment of use case priorities and stakeholder needs, and poor data access and quality.

IDC research indicates that, in 2025, organizations are looking to pivot from endless experimentation and pilot projects toward scaled, production-grade AI deployments. Effective AI adoption and scaling require addressing a range of business and technology challenges. IDC has identified critical building blocks in setting up the foundation for an AI-fueled business, which includes an AI-fueled operational plan unifying strategy, governance, and workforce development, as well as an AI-ready technology operating model for applications, AI platforms, data, and infrastructure.

The rapid emergence of agentic AI in recent quarters adds further complexity to organizations' AI strategies. As AI techniques continue to advance, addressing the fundamental building blocks of AI, adoption remains critical to progressing out of endless experimentation cycles. Organizations continue to rely on trusted services partners with deep expertise, collaborative engagement approaches, and dependable delivery capabilities to drive ROI and business value from AI investments. IDC research shows that strategic support with project prioritization, effective coordination between IT and line-of-business teams, and access to the right developer skills and effective tools are key success factors enabling organizations to achieve the highest levels of success with their AI initiatives.

We continue to observe AI services vendors succeeding in the market by both clearly articulating their strategies for enabling clients' adoption of AI solutions and readily demonstrating their current capabilities and proof points through existing client engagements. We also note that the services industry is undergoing its own transformation due to AI infusion. Resilient and forward-looking vendors are updating best practices and applying lessons learned from their internal AI efforts to help clients navigate adoption and scaling challenges and to deliver desired outcomes more quickly and efficiently.

In this assessment, IDC evaluated AI services vendors across scoring criteria based on information provided in writing and through extensive briefings by participating vendors. IDC also collected feedback from customers on their perception of the key characteristics and the capabilities of these vendors. Key findings include:

- The most critical vendor attribute for successful AI services engagements, according to IDC's *Artificial Intelligence Services Buyer Perception Survey,* remains "ability to achieve business outcomes." The perceived priority of this attribute over all others was unchanged from the 2023 study.

- When buyers were asked about the top business objective driving their engagement of their artificial intelligence services vendor, at a worldwide level, the most frequent responses were "increased operational efficiency," "faster innovation," and "cost savings." Thirty percent of the buyers we surveyed reported they achieved 30% or greater improvement in measurable KPIs from their AI services engagement.

- The top-rated vendor attribute, in aggregate, was the ability to "integrate vendor project team with internal team." Again, the highest satisfaction rating for this vendor characteristic is consistent with findings of the 2023 study.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of AI services providers with global scale and broad portfolios spanning IDC's research coverage of the AI services market. In determining the group of vendors for analysis in this IDC MarketScape, IDC considered the following set of inclusion criteria:

- Worldwide AI services revenue of at least $500 million over the past calendar year

- AI services revenue generated in each major geographic region (i.e., Americas, EMEA, and Asia/Pacific)

- AI services offerings spanning the life cycle of business and IT services (e.g., project based, managed, support, and training)

- AI services offerings addressing a range of industry verticals and business functions
- Offers its own software assets (e.g., tools, platforms, or other proprietary solutions) as part of AI services portfolio
- Go-to-market alliances with a range of AI technology providers

ADVICE FOR TECHNOLOGY BUYERS

- **Maturity assessment.** Consider your organization's strategy and business objectives before selecting any technology. Just because GenAI and agentic AI currently dominate technology and business conversations does not mean that these capabilities are the right solutions to your business problems, or that your organization is ready to take full advantage of them. A good partner will work with you to understand your goals and challenges, first, and then will help you evaluate whether and when you can expect to realize business benefits from AI investments, considering your available talent, data, and technology resources.

- **AI-fueled business operating plan.** Becoming an AI-fueled organization will require integrating AI into your business strategy, focusing on impactful AI use cases, establishing unified governance, and planning for an AI-augmented workforce. If these are areas where you need support, look for providers with approaches that include business transformation consulting, ROI and business value analysis, responsible AI and governance frameworks, workflow reengineering to support human-AI collaboration, and resources for reskilling and enabling employees. Seek out partners that can translate between technical and business concepts to align stakeholder priorities and expectations and can also communicate effectively with your employees through workshops and change management programs.

- **AI technology operating model.** Cost-effective and secure scaling of AI capabilities across an organization requires a unified technology approach that incorporates fit-for-purpose infrastructure; AI-ready data; a platform integrating data, model, and software development life cycle activities; and AI-infused applications and workflows. If your organization is early in its transition to this type of approach, seek out providers with expertise in AI technology foundations and reference architectures, computational resource optimization, data modernization, platform engineering, and design, prototyping, and industrialization of AI applications. If your AI technology operating model is more established, choose providers that can integrate seamlessly with your environment and internal teams and help you optimize deployment efficiency.

- **Skills.** The range of expertise needed to operate as an AI-fueled organization continues to evolve rapidly. Adoption of agentic AI technologies will inevitably

create new job roles and skills requirements for organizations and services providers alike. Select a partner with skilled resources and platform certifications that fill gaps or enhance your existing AI capabilities, integrate well with your internal teams, and can flex as your skill needs change. Consider partnering with a services provider through an AI center of excellence (COE) construct to gain ongoing access to best practices and recommendations, innovation and R&D resources, on-demand AI talent pools, and managed services and support to move AI solutions from experimentation into production.

- **Innovation and accelerators.** Experimentation will remain a necessary part of the journey to becoming an AI-fueled organization. Services partners can provide structure, organization, and insight to reduce innovation risks and deliver more predictable and tangible outcomes. To accelerate moving from proof of concept to production, consider services vendors that both partner with your chosen technology providers and have codified their own domain knowledge and development methodologies into repeatable blueprints and design patterns. Also, consider the proprietary software assets that service providers may propose as part of their AI services offerings to augment products from your technology provider ecosystem and/or automate business, IT, or operations workflows. While a provider's "prebuilt" solution may only address 60–80% of your organization's needs, it may be a better option than a fully customized solution, especially for more common use cases.

- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for AI services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, technical, industry base, or otherwise.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

PwC

After a thorough evaluation of PwC's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for worldwide AI services.

PwC's Data, Analytics, and AI practice combines deep industry knowledge, AI expertise and capabilities, and commitment to responsible AI adoption to help clients across

sectors transform how they operate and grow in an AI-driven world. The firm's key AI services offerings include AI strategy, responsible AI, AI build and implementation, and embedded AI, which includes operate (run, manage, and maintain) and workforce AI adoption and upskilling. PwC also integrates AI into the delivery of its broader consulting and technology services, applying automation and intelligent capabilities across functions such as workforce transformation, business intelligence, software development life cycle, financial planning and analysis, and digital contacts and services. PwC structures its AI alliance ecosystem into five major categories: compute hardware and infrastructure, cloud platforms, models (including closed source and open weight), orchestration and services (including API services, MLOps, and orchestration services), and applications (cloud provider apps, standalone apps, business apps, and sector/function apps), but continues to collaborate with a broad spectrum of providers to address industry and client-specific needs. In March 2025, PwC launched Agent OS, a proprietary enterprise AI orchestration platform that the firm positions as a command center for managing and integrating AI agents into core business workflows and enterprise systems. PwC also continues to invest in and scale its other proprietary platforms, such as Model Edge, to deliver AI governance services.

Strengths

IDC considers PwC's strategies related to client adoption, portfolio, growth, and innovation and R&D to be key strengths. Customers have regard for the company's ability to conduct workshops that help them learn how to scale AI across their business, showcase thought leadership related to emerging AI topics, deliver IP-based services, work with partners, use cutting-edge tools and methodologies, and deliver across the life cycle of AI services.

Challenges

IDC believes PwC employee strategy could be improved by a broader range of recruitment and upskilling strategies. PwC could also benefit from collaboration with a broader spectrum of partners, such as AI infrastructure providers, and a more cohesive strategy for platform-based delivery of AI services.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category

focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines artificial intelligence (AI) as systems that learn, reason, and self-correct. These systems hypothesize and formulate possible answers based on available evidence, can be trained through the ingestion of vast amounts of content, and automatically adapt and learn from their mistakes and failures. AI systems use a variety of technology components across hardware (e.g., AI servers, AI storage, AI infrastructure as a service, AI network, and AI devices) and software (e.g., AI platforms, AI-enabled applications, and AI system infrastructure software). IDC's definition of AI includes three broad categories of capabilities (generative, predictive, and interpretive).

AI services providers engage with clients to help deploy and use AI systems through business services and IT services:

- **Business services** include AI-related business consulting and business process outsourcing services.

- **IT services** include IT consulting, systems and network implementations, IT outsourcing, application development and management, IT deploy and support, and IT education and training related to AI applications and infrastructure spending.

Underlying data services are a critical component of creating AI systems, serving as the base for initial analysis and learning. Data services are highly specific to the function and process of the AI system and may come from a wide range of sources, both unstructured and structured. These data services include the processes needed to ingest, organize, cleanse, and utilize the data within AI-enabled applications.

For detailed definitions of the markets included within business services and IT services, see *IDC's Worldwide Services Taxonomy, 2025* (IDC #US52282025, March 2025).

Customer Perceptions of AI Services Vendors

A significant and unique component of this evaluation is the inclusion of the perceptions of AI services buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's 2025 *Artificial Intelligence Services Buyer Perception Survey* have partnered with at least one of the participating vendors directly on an AI services engagement within their company. The survey findings highlight key areas where buyers expect AI services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for AI services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

Figure 2 illustrates the order of factors important for a successful AI services engagement for the AI services customers surveyed in 2025. Survey findings suggest that the ability to achieve desired business outcomes (business, operational, or technical) by the consulting and delivery teams working on an AI services engagement is the most critical factor for the successful completion of the engagement. Customers also indicated the quality of AI skills and knowledge, the quality and accessibility of data for value-driven use by AI models, prioritization or co-development of relevant AI use cases, and technical insights and competency to be among the most critical attributes for an engagement's success.

FIGURE 2

Top 10 Factors for Successful Artificial Intelligence Services Engagements, 2025

Q.   In order for an AI services engagement to be successful, please indicate the importance of each of the following characteristics.
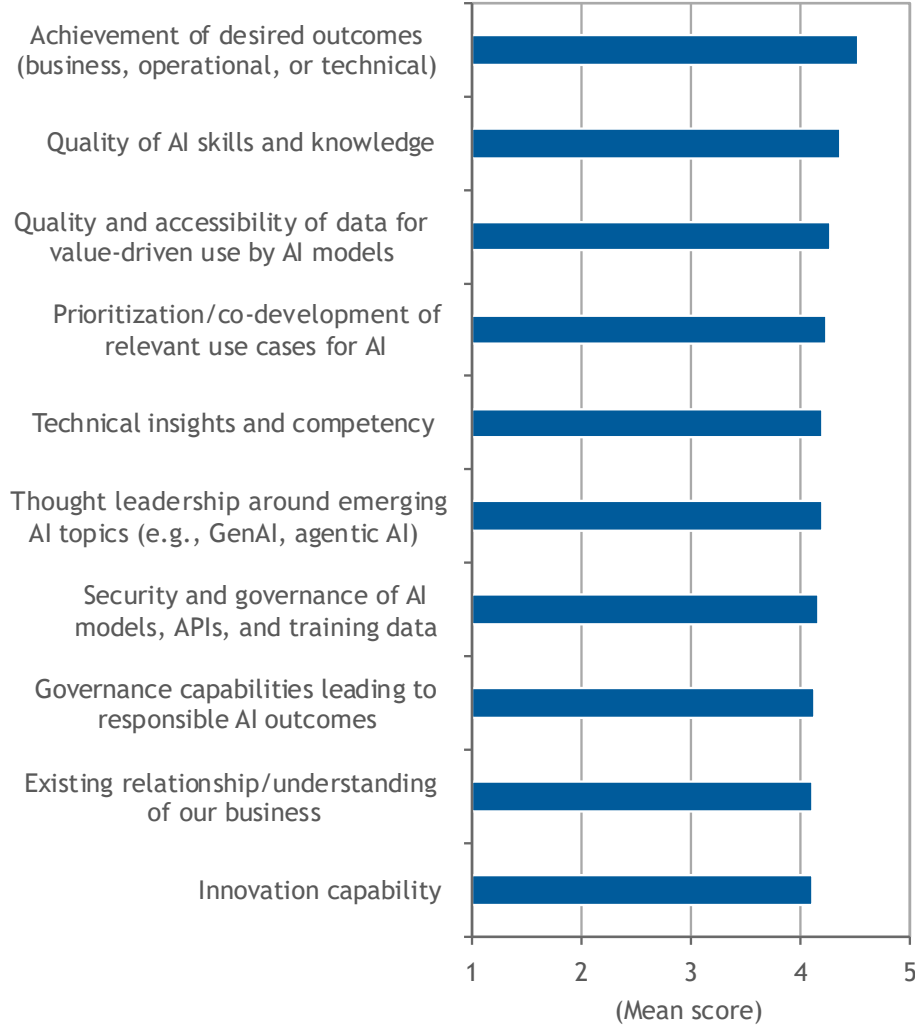
n = 72

Note: Mean scores are based on a scale of 1–5, where 1 is highly detrimental to success and 5 is essential to success.

Source: IDC's *Artificial Intelligence Services Buyer Perception Survey*, 2025

LEARN MORE

Related Research

- *IDC's Worldwide Services Taxonomy, 2025* (IDC #US52282025, March 2025)
- *IDC MaturityScape: AI-Fueled Organization 1.0* (IDC #US53209724, February 2025)

- *Artificial Intelligence Services Findings from Enterprise Intelligence Services Survey, 2024* (IDC #US52167625, February 2025)
- *IDC FutureScape: Worldwide Artificial Intelligence and Automation 2025 Predictions* (IDC #US51666724, October 2024)
- *IDC FutureScape: Worldwide Services 2025 Predictions* (IDC #US52634524, October 2024)
- *Market Analysis Perspective: Worldwide Enterprise Intelligence Services, 2024* (IDC #US51423724, September 2024)
- *IDC MarketScape: Worldwide Artificial Intelligence Services 2023 Vendor Assessment* (IDC #US49647023, May 2023)

Synopsis

This IDC study represents a vendor assessment of the worldwide artificial intelligence (AI) services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the AI services market. This IDC MarketScape covers a variety of vendors participating in the AI services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"The market for AI services has never been more competitive, offering organizations an abundance of choices when considering external partners to help them successfully pivot from experimentation to adoption at scale," says Jennifer Hamel, senior research director, Enterprise Intelligence Services at IDC. "The 20 vendors assessed in this study have established themselves as trusted providers across the full life cycle of AI services, with the ability to assist clients both to establish AI-fueled business plans and to transition to AI-ready technology operating models."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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