

Internet of Things Services 2025 Market Insights™

Driving Industry 4.0 transformation
and shaping the human-centric vision
of Industry 5.0

September 2025

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About the report

About the Internet of Things Services 2025 Market Insights report

1

The Internet of Things is maturing rapidly, moving from POC initiatives to large-scale production deployments across industries. Enterprises are embracing industrial IoT (IIoT) as the foundation of Industry 4.0, deploying connected machinery, robotics, and digital platforms to drive efficiency and innovation. This adoption is also shaping the future of Industry 5.0, with a sharper focus on resilience, sustainability, and human-machine collaboration.

2

IoT adoption is accelerating through the convergence of edge AI, generative AI (Gen AI), analytics, and 5G, enabling real-time decision-making, predictive maintenance, and adaptive operations. Enterprises are strengthening IoT security with zero-trust frameworks and device authentication, while leveraging digital twins to model disruptions, enhance resilience, and address challenges such as supply chain volatility and climate change impacts across critical industries.

3

Avasant's ongoing conversations with industry leaders reveal that enterprises are forging strategic alliances with service providers to meet both operational and strategic milestones. These partnerships are proving to be instrumental in delivering key outcomes, such as boosting equipment efficiency, minimizing maintenance expenses, shortening product development cycles, and advancing sustainability goals.

4

The *Internet of Things Services 2025 Market Insights* aims to provide enterprises with a view into important IoT services market trends and developments. It affords insights into IoT services adoption by enterprise type, key industries, use cases, and platforms.

Key reports of Avasant's Internet of Things Research



Market Insights™ 2025

This report provides a comprehensive overview of the Internet of Things landscape. It delves into the current state of the market, analyzes recent trends shaping the industry, and offers a perspective on the future outlook for Internet of Things services.



RadarView™ 2025

This report examines how leading service providers are delivering Internet of Things services. It covers key supply-side trends and features a deep-dive analysis of providers that Avasant has recognized for their excellence and innovation in the space.



Executive summary

Defining the Internet of Things

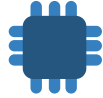




Key definitions

Internet of Things

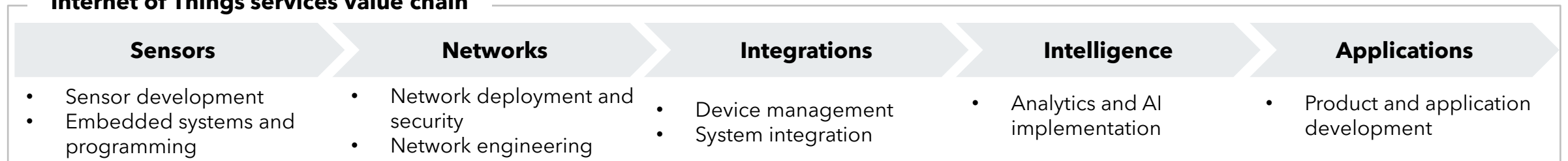
- Avasant defines the Internet of Things (IoT) as an interconnected system of assets/objects equipped with sensors and embedded systems designed to extract information about the devices or their surrounding environment. This information can then be used for real-time analysis, informing and improving decision-making, and enabling intelligent actions.

Internet of Things services

- The IoT services considered in this survey are those that enterprises use to incorporate IoT into their business processes.
- These capabilities and offerings span advisory, product engineering, system integration, security, and analytics services pertaining specifically to IoT solutions.

IoT stack		
	Sensors and controllers	<ul style="list-style-type: none"> • Convert physical inputs and parameters into data streams
	IoT gateways and platforms	<ul style="list-style-type: none"> • Aggregate collection and data structures
	Edge computing	<ul style="list-style-type: none"> • Real-time data processing and basic analytics
	Cloud	<ul style="list-style-type: none"> • Big data processing, business logic, and machine learning
	AI and advanced analytics	<ul style="list-style-type: none"> • Predictive analytics and artificial intelligence modelling

Internet of Things services value chain



Executive summary

Key drivers



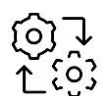
Industrial IoT scaling into production, powering Industry 4.0 and shaping Industry 5.0



AIoT convergence with edge and 5G is enabling real-time, autonomous IoT services



Scaling IoT deployments and IT-OT convergence are elevating cybersecurity as a critical enterprise priority



Digital twins, powered by IoT and AI, are enabling real-time simulation and optimization across industries



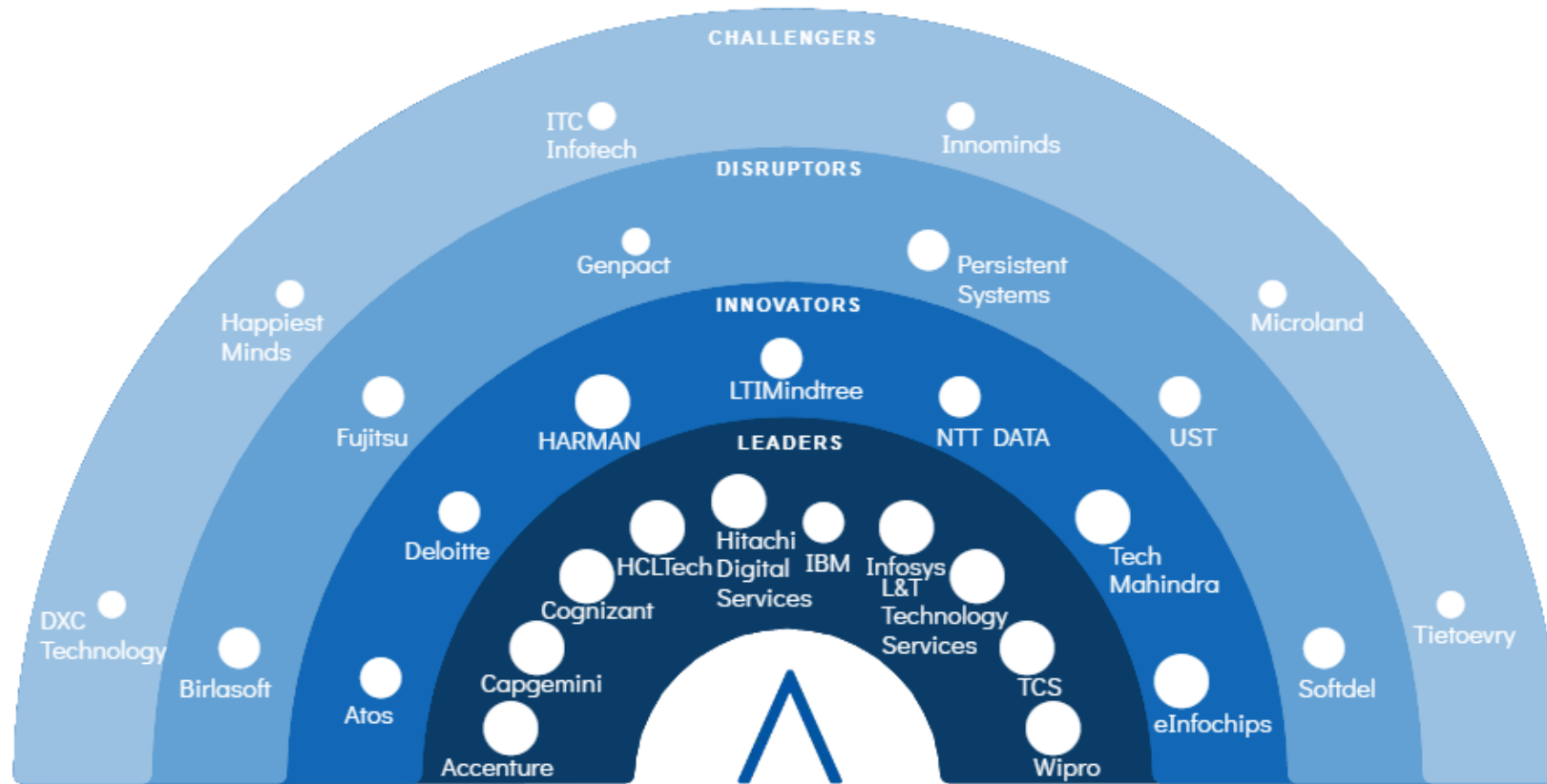
Focus on human-centric and emotion-aware IoT to deliver adaptive and personalized services

Enterprise response

- IoT adoption is scaling across industries, with the industrial IoT as the most prominent segment. It is evolving from Industry 4.0 toward the human-centric, resilient, and sustainable goals of Industry 5.0.
- Enterprises are deploying connected machinery, robotics, and digital platforms that integrate IoT with AI and automation, enabling predictive maintenance, safer shop floors, energy optimization, and human-machine collaboration.
- The shift toward AI convergence is enabling IoT services to deliver real-time insights, autonomous actions, and seamless connectivity through edge and 5G integration.
- Enterprises are experiencing early adoption of agentic AI pilots to automate workflows, signaling a shift toward more autonomous IoT services. They are using edge AI with 5G connectivity for anomaly detection, predictive maintenance, and real-time decisions in IoT environments while applying Gen AI to optimize operations.
- With the expansion of connected devices, IT-OT convergence, rising threats, and regulatory mandates, securing IoT environments is crucial to protecting data, ensuring device reliability, and sustaining critical operations.
- Enterprises are embedding security by design with zero-trust architectures, device authentication, and AI-driven monitoring. They are adopting managed security services to detect and respond to threats faster.
- Enterprises are adopting digital twins to manage operational complexity, simulate supply chain disruptions, test design changes, and model decarbonization pathways before physical execution.
- They are combining IoT telemetry with AI analytics, AR/VR interfaces, and digital thread integration to build dynamic simulations for factory optimization, urban mobility, predictive maintenance, and healthcare applications such as patient monitoring and hospital operations.
- IoT is becoming human-centric, with devices using AI to interpret voice, facial expressions, and gestures to deliver adaptive, personalized services.
- Enterprises are combining IoT sensors with computer vision, natural language processing, and biometric analytics at the edge to detect emotional states in real time. These are integrated with AI models for context interpretation and adaptive responses, enabling applications in vehicles, safety, and consumer devices.

Avasant recognizes 29 top-tier providers offering IoT services

Practice maturity 





Demand-side trends

IoT adoption has moved from pilots to production, with industrial IoT leading in manufacturing and driving the shift from Industry 4.0 to Industry 5.0 (1/2)

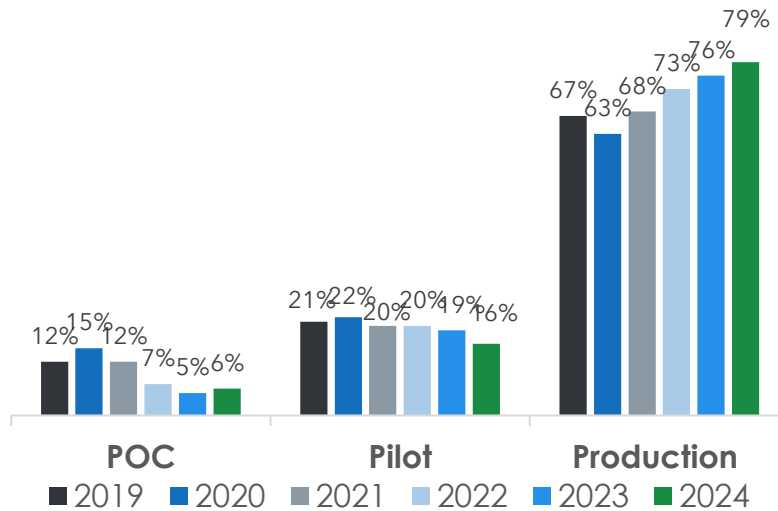
The shift from Industry 4.0 to 5.0 is accelerating IIoT adoption, as companies pursue not just automation but also resilience, sustainability, and human-centric innovation.

~27%¹
Overall new client growth in FY 2024 for service providers compared to 24% in FY 2023

~21%¹
Overall revenue growth in IoT services of the service provider in 2024, compared to 18% in FY 2023

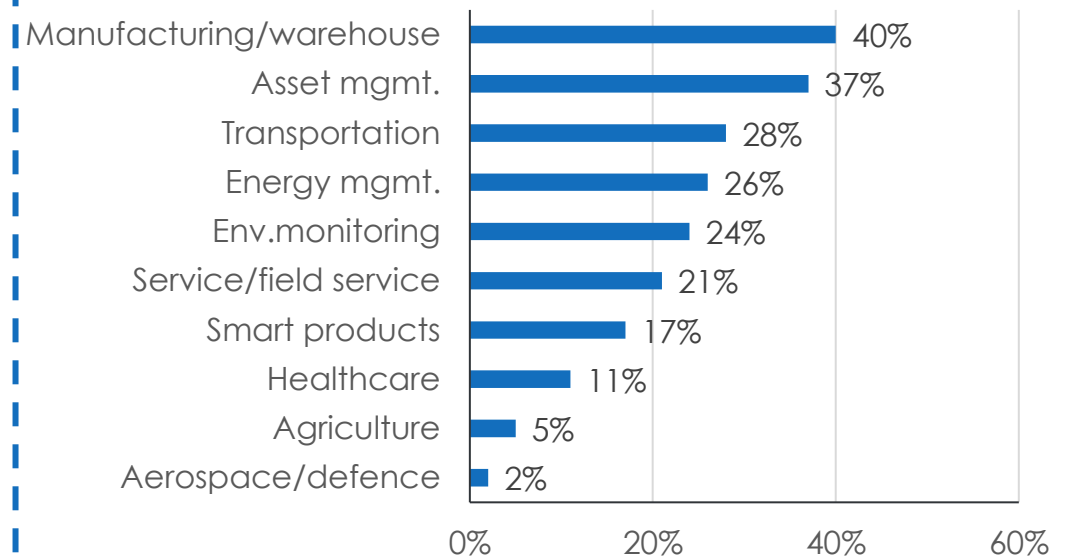
\$377.30B²
The projected global Industry 4.0 market size is expected to grow by FY 2029

Average share of projects in proof of concept (POC), pilot, and production¹



- IoT adoption has shifted from experimentation to scale, with 79% of projects now in production in 2024.
- Projects in the pilot phase declined from 19% in 2023 to 16% in 2024, underscoring market maturity.






Considered/planned uses for new Internet of Things investments³



- IoT use cases are broad, but manufacturing and warehouse operations stand out, attracting 40% of planned IoT investments.
- This concentration of investment highlights that IIoT delivers the fastest ROI through efficiency, predictive maintenance, and AI automation.

Source: Avasant Research, ¹Avasant Internet of Things RadarView Survey, May–August 2025, ¹Avasant Internet of Things Services 2024 RadarView; ²Fortune Business Insights; ³Avasant Computer Economics™ Internet of Things Adoption Trends and Customer Experience 2024

IoT adoption has moved from pilots to scale, with industrial IoT leading in manufacturing and driving the shift from Industry 4.0 to Industry 5.0 (2/2)

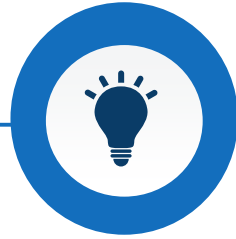
Initiatives	Organization	Sample implementation example
Human-machine collaborative manufacturing	 Mercedes-Benz	In 2025, Mercedes-Benz introduced humanoid robots and AI-driven systems at its Berlin digital factory campus, enabling automation, predictive quality checks, and process innovation.
Gen-AI powered warehouse optimization and delivery efficiency		In 2025, Amazon deployed over one million IoT-enabled robots throughout its fulfillment network and launched DeepFleet, a Gen AI model that optimizes fleet movement, improving warehouse logistics, safety, and workforce productivity.
Connected factory or unified monitoring and predictive maintenance		Siemens Energy deployed a connected IIoT platform across 18 factories, connecting machines, robots, and energy meters. The connected factories enabled unified monitoring, predictive maintenance, and energy optimization.
Testing 3D printing, cobots, and VR/AR tools to accelerate smart factory adoption		Ford's Advanced Manufacturing Center tests 3D printing, collaborative robots, and VR/AR tools to validate Industry 4.0 technologies, enabling safer human-machine collaboration, flexible production, and faster deployment across factories.
Using IoT-enabled AGVs and sensors for real-time logistics optimization		Singapore's Tuas Mega Port operates over 200 IoT-enabled automated guided vehicles (AGVs) and thousands of sensors for real-time logistics optimization. Its IIoT-driven systems improve efficiency through precise tracking, reduced delays, and optimized resource use via AI-powered dashboards and control centers.

The convergence of AI is enabling IoT services to deliver real-time insights, autonomous actions, and seamless connectivity through edge and 5G integration

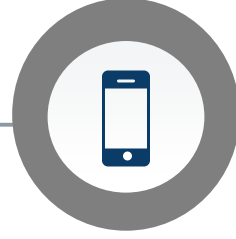
Rising demand for real-time decisions and automation is driving AIoT adoption. Enterprises are using edge AI with 5G for anomaly detection, predictive maintenance, and autonomous workflows while leveraging Gen AI to optimize operations with agentic AI in pilots.



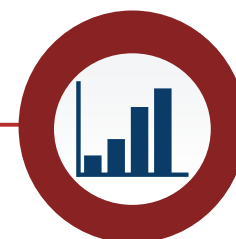
NRL and BSNL signed an MoU to establish 5G CNPN* in Assam, India. This will enable secure connectivity for Industry 4.0 technologies such as IoT, digital twins, AR/VR training, and big data analytics to boost refinery operations.



The city of **Brownsville, Texas**, deploys private 5G and edge AI, enabling IoT-driven smart city services such as safety monitoring, infrastructure management, and real-time city operations.



Philips built its AI ToolSuite on Amazon to accelerate AIoT in healthcare, enabling faster deployment of models into connected medical devices to improve diagnostics, remote monitoring, and regulatory compliance.



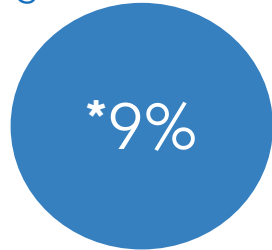
Siemens applied edge AI to enhance predictive maintenance by analyzing machine data such as vibration and temperature. It also used Gen AI to improve accuracy through continuous learning and performance optimization.



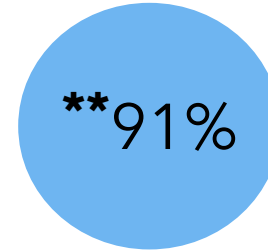
GE HealthCare opened an AI Innovation Lab to explore agentic AI with Health Companion, a multi-agent system integrating radiology, genomics, and pathology to support adaptive, data-driven clinical decision-making.

Scaling IoT deployments and IT-OT convergence are elevating cybersecurity as a critical enterprise priority

There is a growing need for cybersecurity assessments across industries. Due to the expansion of connected devices, IT-OT convergence, rising threats, and regulations, enterprises are strengthening IoT security by implementing AI-driven monitoring, adopting zero-trust frameworks, and enhancing device identity and authentication to safeguard connected environments and ensure operational resilience.



The cyber attacks on botnet/IoT services in FY 2024, compared to 7% in FY 2023



Enterprises are planning to increase its cybersecurity investment in the next 12-18 months.

- 1
- 2
- 3
- 4

Samsung enhanced IoT security in its AI-powered home appliances through the Knox Matrix platform. The solution enables cross-device trust using blockchain technology, synchronizes encrypted credentials, supports cross-platform security, and biometric authentication for safer, seamless access. The solution provides protection across the smart home ecosystem.



Church & Dwight partnered with Rockwell Automation to modernize IT-OT cybersecurity. It leveraged Claroty for continuous monitoring and managed services. The initiative assessed network architecture, asset inventory, and security gaps, which improved visibility, minimized production risks, and strengthened resilience across its global manufacturing operations.



Mitsubishi Electric announced it would acquire Nozomi Networks, an OT/IoT cybersecurity firm. The acquisition will strengthen Mitsubishi's ability to embed security-by-design into industrial operations, enhancing visibility and faster threat detection as IoT deployments scale.



A global automotive company modernized its IAM (Identity and Access Management) system by centralizing governance, consolidating identity sources, and standardizing access processes. This transformation improved compliance, enhanced operational efficiency, and improved visibility, which strengthened the company's security foundation for connected systems and digital operations.

A global automotive company



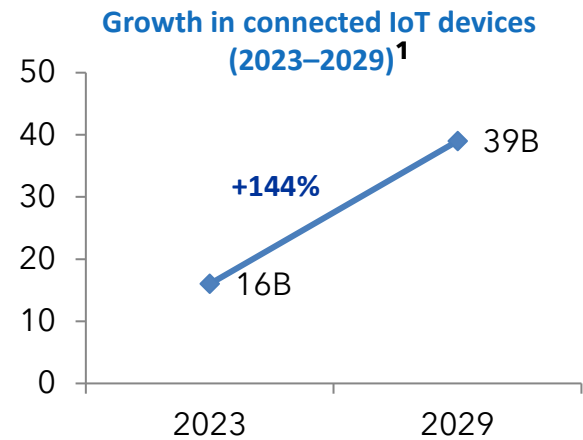
Enterprises are adopting digital twins to manage complexity, simulate disruptions, test design changes, and optimize processes across industries

Rising operational complexity and sustainability pressures are driving digital twin adoption. Enterprises are integrating IoT telemetry, AI analytics, and AR/VR to simulate, optimize, and streamline execution before physical execution.









Human-centric and emotion-aware IoT is emerging to deliver adaptive, personalized, and safe experiences

Enterprises are embedding AI, biometrics, and natural interaction capabilities into IoT systems to improve safety, personalization, and user well-being across industries such as automotive, healthcare, and consumer tech.



- The number of IoT-connected devices has increased from 16 billion IoT devices in 2023 and is projected to grow to 39 billion IoT devices by 2029.
- This represents an 144% increase over six years, creating demand for AI-enabled human-centric connected devices.

Key initiatives	Illustrative examples
 <p>Leveraging conversational AI for natural human-machine interaction</p>	 <p>Mercedes-Benz</p> <p>Mercedes-Benz introduced the MBUX Virtual Assistant, which combines generative AI, advanced 3D graphics, and empathetic interaction that adapts to voice tone. In 2025, Google’s Automotive AI Agent is expected to further enhance it to deliver a more natural, personalized in-car experience.</p>
 <p>AI-enabled wearable devices for health insights</p>	 <p>In 2025, Samsung introduced the Galaxy Watch 8 series, which leverages AI and IoT sensors with advanced biometric tracking features, including cardiovascular stress monitoring, personalized bedtime guidance, and sleep apnea detection, delivering tailored wellness insights to improve sleep quality and overall health of the user.</p>
 <p>AI-powered emotion-aware wearable devices</p>	 <p>In 2024, Emteq Labs introduced Sense, an AI-enabled eyewear with integrated sensors and facial analytics. In real time, the device captures emotional and behavioral data, such as mood, eating habits, and postures, supporting health, wellness, and consumer insights through connected platforms.</p>

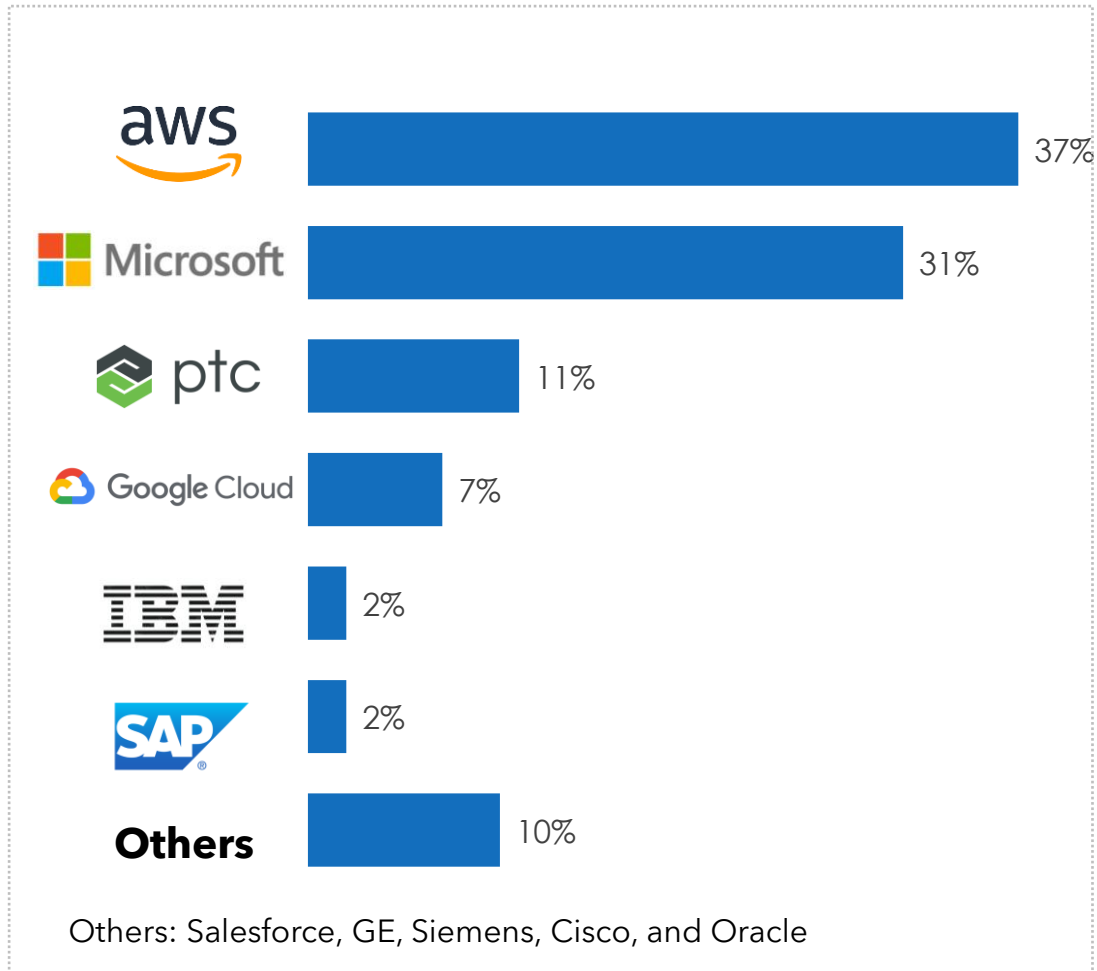
Key considerations and criteria when choosing a platform-based approach

Organizations predominantly utilize the Amazon Web Services IoT platform, Azure IoT platform, and PTC ThingWorx, with approximately 79% of IoT services implemented on these platforms.

IoT platform considerations and criteria:

- 1 Modularity and flexibility**—storage, data processing, deployment, and pricing
- 2 Interoperability**—standards, apps, APIs, and programming languages
- 3 Network and connectivity**—standards, protocols, and network configuration
- 4 Integration with business applications and third-party systems**—ERP, CRM, and manufacturing execution system
- 5 Scalability**—device management, analytics, processing, and microservices
- 6 Security**—end-to-end security, disaster management, and access and identity management
- 7 Integration of emerging technologies**—AI, advanced analytics, and blockchain
- 8 Customization**—vertical and horizontal platform integration
- 9 Usability**—user friendliness and efficiency

Share of IoT platforms deployed by service providers in the past 12-15 months:



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Cognizant profile

Cognizant: RadarView profile



Practice overview

- Practice size: 10,000 core IoT engineers
- Active clients: N/A
- Delivery highlights: 95+ delivery centers globally

>\$1B Revenue from IoT services, FY 2024	10%-20% YOY revenue growth in IoT services, FY 2024
---------------------------------------------	--------------------------------------------------------

Industry-specific solutions/offerings

iDATS Accelerator	A plug-and-play, device-agnostic framework for scalable, remote system validation and orchestration
1Track	A solution for real-time monitoring of assets through seamless system and sensor integration
OnePlant™	A solution for IT-OT convergence, enabling intelligent operations with speed, AI, and real-time insights
CoreART	A unified IoT platform offering device management, over-the-air (OTA) updates, and edge analytics

Sample clients

- A US-based retailer
- A global automotive OEM
- A healthcare provider
- A global beverage and brewing conglomerate
- A global tool manufacturing company
- A US-based surgical device manufacturer
- A US-based equipment manufacturer
- A global pharmaceuticals company

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Partner ecosystem ★★★★★

Scales IoT-led transformation through AI platforms, Neuro® Edge, strategic alliances, and industry-specific solutions that integrate real-time intelligence across connected ecosystems.

Partnerships/alliances

Leveraged the AWS IoT platform to deliver smart manufacturing solutions	Codeveloped APEx to enable Gen AI-led QMS* and digital twin use cases for Industry 4.0
Partnered to deliver AI-powered Industry 4.0 solutions across MES*, QMS, Digital Twin, and Utilities 4.0	Partnered to accelerate Gen AI and multiagent AI workflows, enabling operational intelligence
Delivered integrated PDM*, PLM*, and BOM* solutions to enable the digital thread across IT/OT	Collaborated to deliver digital twin as a service to drive factory and warehouse productivity
Partnered to deliver edge-ready connectivity with 5G, hardware platforms, and OT* cybersecurity	Partnered to enable real-time industrial data control and insights via HMI* and historian solutions

Value chain coverage

Aerospace & defense
Banking
Financial services
Government
Healthcare & life sciences
High-tech
Insurance
Manufacturing
Nonprofits
Retail & CPG
Telecom, media & entertainment
Travel & transportation
Utilities & resources

Darker color indicates higher industry concentration: ●●●●●

*Note: QMS: Quality management system; MES: Manufacturing execution system; PDM: Product data management; PLM: Product life cycle management; BOM: Bill of materials; OT: Operational technology; HMI: Human-machine interface



Cognizant: RadarView profile

Case studies

Client	Capability	Summary	Business impact
A US-based retailer	<ul style="list-style-type: none"> AI and analytics Cloud IoT 	<ul style="list-style-type: none"> The client struggled with high alarm volumes, false positives, and delayed responses across HVAC, refrigeration, and lighting systems, leading to operational inefficiencies, food spoilage, and rising energy costs. Cognizant implemented a cloud-based, IoT-enabled platform with over 884 sensors, 3,100 monitoring points, and 2,000 business rules, enabling real-time monitoring, predictive insights, and an intelligent alarm management system. 	<ul style="list-style-type: none"> Achieved OPEX savings of \$18M Saved \$4.8M by reducing false positives Reduced food waste by 10% Saved \$5.25M in energy costs
A global automotive OEM*	<ul style="list-style-type: none"> Cloud Edge computing IoT 	<ul style="list-style-type: none"> The client sought to modernize its connected vehicle experience by building a scalable, cross-platform car-to-cloud (C2C) solution to support diverse vehicle models and deliver cost-effective content services. Cognizant designed and developed a software-defined vehicle (SDV) platform using a cloud-native C2C architecture with integrated digital cabin services, edge gateway development, and OTA* life cycle management powered by AWS and Cognizant's CoreART accelerators. 	<ul style="list-style-type: none"> Accelerated platform delivery by 15%-20% Achieved over \$100K in annual cost savings through cloud automation Enabled faster testing and integration
A healthcare provider	<ul style="list-style-type: none"> Cloud IoT 	<ul style="list-style-type: none"> The client struggled to streamline suture inventory, resulting in manual ordering inefficiencies, waste, and limited integration across hospital systems. Cognizant developed an AWS-based, IoT-enabled data-sharing platform that integrated hospital systems with the client's supply chain, enabling automated dispensing, real-time inventory tracking, usage analytics, and flexible subscription models. 	<ul style="list-style-type: none"> Reduced manual and rush orders by 25% Saved 20 hours/week in hospital staff time through automation Reduced suture waste and enabled standardized usage recommendations
A global beverage and brewing conglomerate	<ul style="list-style-type: none"> AI and analytics IoT 	<ul style="list-style-type: none"> The client lacked remote visibility and optimization of Cleaning-in-Place (CIP) processes across multiple beverage and dairy plants, affecting hygiene compliance and sustainability goals. Cognizant implemented an AI/ML-driven, IoT-based monitoring platform with a CIP digital twin, leveraging sensor data (pressure, temperature, pH, and conductivity) across 100 objects to enable feature extraction, scenario analysis, and deviation tracking. 	<ul style="list-style-type: none"> Reduced water, energy, and chemical usage Minimized cleaning time cycle Enabled identification of optimal operating conditions

*Note: OEM: Original equipment manufacturer; OTA: Over-the-air

Cognizant: RadarView profile

Analyst insights

Practice maturity



- With over 10K core IoT engineers and 50K application and cloud specialists, Cognizant delivers digital transformation across the Design-Make-Service life cycle. It delivers advanced IoT solutions within products and across the factories. Key products include embedded systems, EVs, intelligent edge devices across smart factories through Industry 4.0, asset management, remote surveillance with Gen AI, digital thread, sustainability, and autonomous operations.
- It enables end-to-end connected healthcare and IoMT* solutions with 6,000 experts and collaboration with medical device firms. The solution integrates patients, healthcare professionals, products (medical devices and drugs), and processes (diagnostics, telemedicine, and clinical trials), supporting medical device, pharmaceutical, and payor systems. Prebuilt use cases include digital therapeutics, remote trials, patient monitoring, and medical device management.
- Its Neuro Edge is an edge AI platform that delivers real-time Gen AI applications on edge devices. It simplifies integration with sensors and enterprise systems, supports model personalization, ensures data privacy, and helps reduce OPEX for industry-specific use cases. In 2025, it integrated NVIDIA AI into its Neuro AI platform to scale multiagent systems, industry-specific LLMs*, and digital twins, scaling IoT-led automation in smart manufacturing and connected enterprises.

Investments and innovation



- In 2024, Cognizant acquired Belcan, a leading ER&D and technical services provider, to strengthen its capabilities in aerospace, defense, space, automotive, and industrial sectors. This strategic move enhances Cognizant's ability to deliver end-to-end IoT-led digital engineering and Industry 4.0 solutions.
- In 2025, it partnered with OMRON to deliver integrated IT-OT solutions for smart manufacturing. They jointly launched a Co-Innovation Lab in Japan to develop AI, IoT, and digital twin use cases, combining OMRON's factory automation expertise with Cognizant's Industry 4.0/5.0 tools APEX and OnePlant.
- Its Innovation Labs, including Embedded, RF, 5G, Networking, AR/VR, and System Engineering Labs, accelerate IoT use cases and innovations by enabling real-world simulation, testing, and validation across connectivity, edge, and immersive technologies.

Partner ecosystem



- Cognizant partners with IoT platform providers such as AWS, Microsoft Azure, Google Cloud, IBM, and PTC; MES/ MOM* providers such as AVEVA, Rockwell Automation, and SAP; and edge and networking providers such as Siemens, OSIsoft, Cisco, Dell, Verizon, and Qualcomm to deliver industrial IoT solutions.
- In 2024, it signed a multiyear agreement with AWS to accelerate smart manufacturing with Gen AI-powered digital factory and scalable Industry 4.0 platforms.
- In 2025, it strengthened its automotive IoT capabilities by partnering with Elektrobit and Siemens to accelerate SDV development. Through Elektrobit, it integrated Adaptive AUTOSAR and Gen AI-led automation into its SDV accelerator, enabling OEMs to adopt modular, scalable, and cost-efficient architectures. With Siemens, it embedded PAVE360™, a digital twin solution for sensor modeling and simulation-driven testing, streamlining end-to-end SDV development.

*Note: IoMT: Internet of medical things; LLM: Large language model; MOM: Manufacturing operations management

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Appendix:
About RadarView

Avasant's Internet of Things Services 2025 RadarView assesses providers across three critical dimensions

Practice maturity

- This dimension considers the current state of a provider's IoT practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement.
- The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.

Partner ecosystem

- This dimension assesses the nature of the provider's partnership ecosystem, objectives of the partnerships (codevelopment and co-innovation), and its engagement with solutions providers, startup communities, and industry associations.
- Vital aspects in this dimension are evaluation of joint development programs around offerings, go-to-market approaches, and the overall depth in partnerships.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures

Publicly available information such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements

Market interactions

Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement

Provider inputs

Inputs collected through an online survey and structured briefings during May-August 2025

Of the more than 44 IoT service providers assessed, the final 29 featured in the IoT Services 2025 RadarView are:



Note: Assessments for Atos, Deloitte, DXC, Fujitsu, Happiest Minds, IBM, Innominds, Microland, NTT DATA, Persistent Systems, Tech Mahindra, and Tietoevry were conducted based on public disclosures and market interactions only.

Reading the RadarView

Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, investments and innovation, and partner ecosystem) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of specialization.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of providers in other categories.

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