

Magic Quadrant pour les services de conseil en technologies numériques et en affaires

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Les services de conseil en technologies numériques et en gestion reflètent de plus en plus l'intégration harmonieuse de l'information, des technologies et de la stratégie d'entreprise, avec des initiatives interconnectées couvrant plusieurs disciplines. Les dirigeants de SPVM peuvent s'appuyer sur ces recherches pour évaluer les prestataires de services internationaux dans ce contexte dynamique.

Définition/Description du marché

Les services de conseil en technologies numériques et en gestion d'entreprise reflètent l'imbrication de l'information, de la technologie et du commerce. Ce marché est de plus en plus porté par des actions et des initiatives concertées et interdépendantes, plutôt que par une architecture technologique traditionnelle à plusieurs niveaux. Ces services de conseil, axés sur des projets spécifiques, visent à définir l'ambition et à concevoir les processus d'information, technologiques et métiers des clients.

Les services de conseil en technologies numériques et en gestion d'entreprise s'appuient sur l'expertise de spécialistes qualifiés en affaires et en technologies pour aider les clients à opérer des changements stratégiques et à réaliser des améliorations opérationnelles durables. Ces services sont utilisés par des clients de tous les secteurs d'activité, selon les cas d'usage décrits ci-dessous.

Les services de conseil en transformation numérique sont des services contractuels proposés par les clients dans le but d'accroître leur valeur ajoutée grâce à l'utilisation des technologies numériques pour optimiser leurs modèles opérationnels et transformer leurs modèles économiques. Les services de conseil inclus dans les prévisions de Gartner se limitent aux services de conseil qui précèdent, facilitent ou influencent l'adoption des technologies de l'information.

Services de conseil en marketing digital et stratégie de marque. Les services de marketing digital consistent à élaborer et à mettre en œuvre des stratégies marketing pour les marques internationales. Les services de stratégie de marque aident les clients à définir un positionnement stratégique différencié sur le marché et à concrétiser cette stratégie afin de stimuler la croissance de l'entreprise.

Services de conseil en technologies numériques et déploiement du cloud : Ces services de conseil harmonisent les phases d'ambition et de conception des environnements et systèmes informatiques de back-office, en mettant l'accent sur les coûts, la simplicité d'utilisation et les opérations quotidiennes, notamment grâce aux technologies cloud. Ils facilitent les initiatives de transformation numérique des entreprises en fournissant l'architecture technique et le support nécessaires à cette transformation. Les segments de conseil en technologies comprennent le conseil en technologies applicatives, le conseil en technologies d'infrastructure, ainsi que la stratégie et la gouvernance technologiques.

Services de conseil en ingénierie de produits numériques : Ces services accompagnent les organisations souhaitant développer des produits et services s'appuyant fortement sur des sources numériques de création de valeur – personnalisables, interactifs, intelligents ou connectés. Ils peuvent inclure une aide à la conception de produits ou de services, ou encore à la création d'expériences client uniques. La co-crédation, en étroite collaboration avec l'organisation cliente – que ce soit en virtuel ou en laboratoire – est souvent un aspect essentiel de ces services.

Fonctionnalités obligatoires

Les caractéristiques obligatoires pour ce marché sont les suivantes :

- **Leadership éclairé et recherche :** Capacité du fournisseur à définir une vision pour l'industrie/le secteur/le domaine technologique, à publier des recherches qui élargissent les horizons de l'industrie et à commercialiser à grande échelle des services de conseil axés sur la propriété intellectuelle (PI).

- **Références au portefeuille clients et aux études de cas** : La diversité du portefeuille clients, l'envergure et la durée des relations, ainsi que l'impact commercial des services fournis aux clients témoignent de la réputation et de la notoriété du prestataire en tant que conseiller de confiance.
- **Expertise en matière de transformation d'entreprise** : Capacité du prestataire à fournir des services de conseil qui introduisent, facilitent ou influencent l'adoption des technologies de l'information dans les domaines des RH, de la chaîne d'approvisionnement, des finances, des risques, du marketing et de la gestion de la relation client. Cette compétence reflète également l'aptitude du prestataire à conseiller ses clients sur leurs programmes de transformation de l'expérience client/employé/citoyen.
- **Expertise en conception de transformation technologique** : la capacité des prestataires à conseiller et à guider leurs clients dans leurs initiatives de transformation numérique en tirant parti des technologies établies et émergentes.
- **Expertise en matière de développement de nouveaux produits , services ou expériences** : Capacité du prestataire à innover et à créer de nouvelles opportunités de revenus, à concevoir, à développer et à commercialiser de nouveaux produits, services ou expériences pour ses clients dans divers secteurs d'activité.
- **Expertise en matière de conseil réglementaire et géopolitique** : Capacité du prestataire à conseiller et à guider le client à travers des environnements réglementaires géopolitiques et sectoriels en constante évolution (mondiaux et régionaux) lorsqu'il consomme, développe et acquiert des technologies innovantes pour transformer son entreprise et ses agences.
- **Outils et méthodologies** : Investissement du fournisseur, leadership éclairé et inventaire d'outils, de points de référence, d'indices et de cadres spécifiques à l'industrie/au secteur qui constituent la base des missions de conseil et d'accompagnement.
- **Renforcement des compétences et gestion du changement** : capacité du prestataire à développer les compétences des équipes dirigeantes et des employés du client, à créer de nouvelles capacités organisationnelles et commerciales, à transformer les processus de l'organisation et à favoriser l'adoption des technologies. Ceci permet aux organisations clientes d'atteindre leur plein potentiel.

Caractéristiques communes

Les caractéristiques communes à ce marché sont les suivantes :

- **Développement des talents** : capacité du prestataire à attirer et fidéliser les meilleurs talents à tous les niveaux d'expérience, à l'échelle mondiale. Cette capacité essentielle évalue également son aptitude à structurer efficacement son vivier de talents pour répondre aux besoins variés de ses clients, en offrant des perspectives d'évolution et de mobilité à son personnel et en mettant en place des programmes de formation performants pour développer ces talents.
- Force et présence sur les marchés géographiques choisis : capacité du fournisseur à conseiller ses clients internationaux sur leurs opérations grâce à son vaste réseau et à sa portée étendue, tout en maintenant une forte pertinence contextuelle et régionale grâce à des ressources et une expertise de terrain.
- **Modèle de prestation de services** : Capacité du prestataire à faire preuve d'agilité pour soutenir une clientèle diversifiée, à structurer les engagements de manière rentable en utilisant des cadres et des méthodologies reproductibles, et à tirer parti de centres d'excellence mondiaux pour une expertise approfondie dans le domaine.
- **Innovation et adoption technologique** : capacité des prestataires de services à accompagner leurs clients tout au long du processus, de la co-création à la mise en œuvre de leur stratégie d'innovation. Cette compétence essentielle mesure l'aptitude du prestataire à permettre à ses clients d'adopter les technologies, depuis l'évaluation de leur préparation jusqu'à leur adoption par les utilisateurs.
- **Partenariats stratégiques et alliances** : Force, diversité et compétences du réseau de partenaires ou d'alliances du fournisseur. Cela inclut les partenaires en matière de conception, de technologie et d'innovation. Cet atout permet au partenaire de mettre à profit les forces de son écosystème pour offrir au client un service personnalisé.
- **Engagement en matière de résultats commerciaux** : La capacité du fournisseur à opérer selon divers modèles commerciaux a un impact direct sur le chiffre d'affaires, les bénéfices et l'expérience client globale de ses clients, et à être rémunéré en fonction des résultats commerciaux obtenus pour ces derniers.
- **Expertise du secteur public** : Capacité du prestataire à comprendre les spécificités des entreprises et organismes du secteur public. Impact démontré du prestataire sur l'amélioration du quotidien des citoyens et la promotion de l'adoption des technologies au sein du gouvernement.

Quadrant magique

Figure 1 : Quadrant magique des services de conseil en technologies numériques et en affaires



Points forts et points faibles des fournisseurs

Accenture

Accenture figure parmi les leaders de ce Magic Quadrant. Gartner estime qu'Accenture compte plus de 70 000 ETP dédiés aux solutions DTBCS pour les quatre cas d'usage,

répartis géographiquement avec 30 % de ses ETP en Amérique du Nord, 45 % en EMEA et 25 % en Asie-Pacifique. (Remarque : le total des pourcentages peut ne pas atteindre 100 % en raison des arrondis.) Environ 67 % de ces talents ont moins de cinq ans d'expérience, tandis que 12 % en ont plus de dix.

Les principaux sponsors d'Accenture au sein de la direction sont le DSI/CTO, le PDG et le DAF, selon leur contribution au chiffre d'affaires des services de conseil d'Accenture. Gartner estime qu'environ 85% des missions de conseil d'Accenture sont des contrats à fournisseur unique et d'envergure, dont 40% dépassent 5 millions de dollars, 30% sont inférieures à 1 million de dollars et 30% se situent entre 1 et 5 millions de dollars.

Le commerce de détail et les produits de consommation (CPG), les services bancaires et les marchés de capitaux, ainsi que les services publics constituent les trois principaux secteurs d'activité prioritaires du fournisseur en 2026.

Points forts

- **Création de valeur responsable** : Accenture utilise des modèles commerciaux axés sur les résultats, alignant ses honoraires et ses engagements de prestation sur des résultats mesurables pour ses clients, tels que l'optimisation des coûts, la résilience opérationnelle, l'agilité et l'innovation . Les clients doivent activement rechercher de tels accords pour tirer pleinement parti de la valeur ajoutée qu'Accenture peut leur apporter.
- **Offres différenciées pour le marché intermédiaire** : Accenture se différencie en se concentrant sur le segment du marché intermédiaire, grâce à des objectifs de revenus quantifiés et à des fusions-acquisitions ciblées, comme en témoigne l'acquisition de Navisite, un fournisseur établi de services de transformation cloud et applicative en Amérique du Nord .
- **Alignement des investissements inédit par secteur** : la structure matricielle mondiale d'Accenture est axée sur les secteurs d'activité, alignant les investissements et les résultats financiers sur les secteurs eux-mêmes. Les clients bénéficient ainsi de solutions sur mesure et d'une forte spécialisation verticale.

Mises en garde

- **Complexité liée à l'expansion des outils de propriété intellectuelle et d'IA** : Accenture propose un portefeuille étendu et en constante expansion d'outils propriétaires de propriété intellectuelle et d'IA intégrés à ses services. Cependant, le volume et l'introduction continue de nouveaux actifs peuvent représenter un défi pour les clients

qui souhaitent en comprendre, appliquer et maximiser pleinement la valeur face à la diversité de leurs besoins de transformation.

- **Qualité et cohérence des prestations et des effectifs** : Malgré des processus et un système de suivi internes rigoureux, Accenture rencontre des difficultés pour offrir une expérience client uniforme et de haute qualité sur l'ensemble de ses missions, notamment à mesure qu'elle développe ses activités et intègre ses différentes lignes de services. Il est conseillé aux clients de vérifier que le modèle de prestation de services, les plans d'effectifs et les indicateurs de performance sont adaptés à leurs besoins.
- **Pricing perception risk**: Rigid terms, higher costs and expanded project scope may deter cost-sensitive clients. Clients should carefully assess commercial terms and value alignment to ensure the investment fits their objectives and budget.

Bain & Company

Bain & Company is a Visionary in this Magic Quadrant. Gartner estimates that Bain has over 11,000 FTEs delivering DTBCS across all four use cases, geographically diversified with approximately 40% of its DTBCS FTEs in the Americas, and approximately 54% in EMEA and the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) About 45% of this talent has less than five years of experience, while 35% has more than 10 years of experience.

Bain's top executive sponsors in its customer organization are the COO and CRO, as assessed by their share of contributions to Bain's consulting services revenue. Typically, 80% of the provider's consulting engagements are sole-sourced and substantial in scale, with 50% of them exceeding \$5 million and 30% in the \$1 million to \$5 million range.

Consumer products (CPG), financial services and private equity are the vendor's top three focus industry verticals in 2026.

Strengths

- **Proprietary assets**: Bain utilizes a robust suite of proprietary platforms and frameworks, such as NPS Prism, Helix, Pyxis by Bain and ARC, which are recognized industry standards for benchmarking and transformation management.
- **Commercial proposition**: A key commercial proposition of Bain is the strategy to decouple pricing from input costs (e.g., hours and staffing). This enables the flexible

involvement of senior partners and global experts whenever needed, while also providing clients with full access to Bain's platforms and AI tools.

- **Proactive peer-to-peer learning communities:** Bain offers a refined ecosystem of peer networks designed to strengthen client experience, such as Stratos (a C-suite forum for senior women leaders in financial services) and CEO Forums (convening more than 4,500 executives across over 40 markets), fostering idea exchange and deep engagement. Clients that can justify the premium to access these communities will benefit from this capability.

Cautions

- **Limited scale for technology transformation:** Bain maintains a lean internal implementation workforce by design and scales execution through ecosystem partners rather than a large internal delivery bench. Clients must require Bain to commit to outcomes by owning the transformation governance and orchestration of downstream technology implementation.
- **Focus on large enterprises:** Bain's engagement with midsize and small enterprises is almost exclusively in the context of private equity work, where the investor requires assistance delivering on a value creation plan. Clients seeking a consulting transformation partner outside of a private equity context may find Bain's offerings less accessible or customized.
- **Lack of depth in industry-specific IP:** Bain's industry-specific IP portfolio, as compared to other providers assessed in this research, includes fewer stand-alone artifacts. Instead, it uses sector-level insights generated through its cross-industry platforms and benchmarking tools. Clients in verticals outside of the vendor's stated priority verticals should exercise caution, and ensure these assets are tailored to their specific context.

BCG

Boston Consulting Group (BCG) is a Leader in this Magic Quadrant. Gartner estimates that BCG has over 13,000 FTEs delivering DTBCS across all four use cases (including its BCG X and Platinion brands), and is geographically diversified with 34% of its DTBCS FTEs in the Americas, 40% in EMEA and 26% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 35% of this talent has less than five years of experience while 35% has more than 10 years of experience.

According to Gartner, BCG's top three target executive sponsors in its customer organization are the CEO, CIO/CTO and CRO, as assessed by their share of contributions to BCG's consulting services revenue. Typically, 50% of the provider's consulting engagements are sole-sourced and substantial in scale, with 80% of them between \$1 million and \$5 million or more.

Public sector, healthcare and technology, and media and telecommunications are the vendor's top three focus industry verticals in 2026.

Strengths

- **Advanced AI-powered strategic foresight and geopolitical acumen:** BCG's integrated, AI-driven ecosystem, featuring tools like Strategic Foresight Framework, MarketSensing@BCG platform and CEO Radar, provides real-time insights and scenario planning to help clients anticipate change and achieve resilient transformation. BCG's Center for Geopolitics combines geopolitical expertise with analytics, guiding clients through global and regulatory shifts with actionable pathways, not just forecasts.
- **Integrated delivery and deep vertical expertise:** BCG's organizational framework, known as the "OneBCG" model, is specifically designed to fuse strategic consulting with deep industry knowledge and technical execution to provide end-to-end transformation solutions.
- **Embedded enablement and ownership transfer model:** BCG differentiates itself with outcome-driven, value-based pricing models, with a significant number of contracts tied to measurable results. The firm's flexible engagement approach, including co-funding prototypes, joint IP creation and build-operate-transfer models, offers sustainable client value.

Cautions

- **Variability in client experience:** Responses to Gartner's customer reference survey highlighted variability in client experiences. Prospective clients are advised to seek additional client references in their specific industry subvertical.
- **Not focused on small and midsize enterprises:** BCG primarily serves large, complex organizations and occasionally engages with midsize firms. Small and midsize enterprises may find BCG less suited for standardized, scalable or cost-effective digital consulting solutions.

- **Tech implementation scale:** While BCG provides strong strategic direction and change management, some clients have noted concerns over technology delivery alignment, fees and the limited depth of shorter engagements. For large-scale, multiyear implementations, BCG often orchestrates rather than directly delivers, so clients should consider their comfort with this model and the potential need for third-party partners.

Capgemini

Capgemini is a Niche Player in this Magic Quadrant. Gartner estimates Capgemini Invent has about 10,000 FTEs delivering DTBCS across all four use cases (including the consulting capability from all its acquisitions), and is geographically diversified with 20% of its DTBCS FTEs in the Americas, 60% in EMEA and 20% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 35% of its consulting talent pool has more than 10 years of experience.

According to Gartner's estimates, Capgemini's top target executive sponsors in its customer organization are the CIO and CTO. Gartner estimates 20% of the provider's consulting engagements are sole-sourced and substantial in scale, with 80% of them between \$1 million and \$5 million.

Based on Gartner's analysis, life sciences, defense and energy, and utilities are the vendor's priority industry verticals in 2026.

Capgemini declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Strong market sensing and thought leadership:** Capgemini demonstrates strong market sensing capabilities through external engagement, proprietary tools and thought leadership. Its consulting team tracks trends, while the Management Lab explores emerging topics.
- **Integrated design and consulting capabilities:** Capgemini Invent uniquely combines creative design, technology product engineering and strategy consulting to deliver end-to-end transformation that is ideal for large, complex clients, specifically in automotive and manufacturing.
- **Industry depth and global scale:** With accelerators for growth sectors and approximately 30% to 40% of capability aligned to industry-specific expertise, Capgemini Invent excels

in complex verticals like automotive, life sciences and manufacturing. Its global P&L and community-of-practice model, supported by innovative teams such as Connected Products and Services, enables effective delivery across these domains.

Cautions

- **Increased coordination demands for clients in integrated transformations:** Capgemini Invent's success relies on integrating its various brands. Clients should provide extra oversight to prevent fragmented delivery and unclear accountability.
- **Tiered service and talent access for midsize clients:** Capgemini mainly targets large enterprises and public-sector clients. Midsize organizations and startups may be routed to separate channels (e.g., Sogeti or local teams). Clients should confirm if they will have access to tailored offerings and specialist talent that suit their profile and context.
- **Experience variability:** Capgemini Invent is stronger in European markets compared to North America or the Asia/Pacific region. Furthermore, service quality and culture vary by practices among Capgemini Invent brands. U.S. buyers should validate local delivery capabilities, while all clients should request specific client references for their particular use case.

Deloitte

Deloitte is a Leader in this Magic Quadrant. Gartner estimates that Deloitte has over 146,000 FTEs delivering DTBCS across all four use cases, geographically diversified in the following rank order: the Americas, EMEA and the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Gartner estimates that approximately 65% of this talent has less than five years of experience, while approximately 15% has more than 10 years of experience.

Deloitte's top three target executive sponsors in its customer organization are the CIO/CTO, CFO and COO, as assessed by their share of contributions to Deloitte's consulting services revenue. Gartner estimates that approximately 70% of the provider's consulting engagements are won through competitive tenders, medium to small in scale, with 80% of them at less than \$500,000.

Public sector, financial services, and energy resources and industrials are the vendor's top three focus industry verticals in 2026.

Strengths

- **Integrated delivery and industry focus:** Deloitte's Advise, Implement, Operate (AIO) model integrates strategy, execution and operations in key business functions, supported by sector-specific teams and co-sponsored leadership investments for deep industry expertise.
- **Exceptional client penetration depth across industries:** Deloitte builds deep industry expertise through dedicated sector teams and a strong portfolio of industry-specific AI-powered IP, serving over 70% of Fortune 500 companies across all verticals. This extensive engagement provides unmatched insight into sector challenges and opportunities.
- **Agile acquisition strategy for niche digital and AI capabilities:** Recent acquisitions highlight Deloitte's focus on integrating specialized technology and engineering skills. This disciplined strategy accelerates market readiness and expands service offerings, enabling rapid response to evolving client demands for advanced technology services.

Cautions

- **High volume of small deals:** Much of Deloitte's business comes from large enterprises; however, Gartner estimates that most are small deals (less than \$500,000) won through competitive tenders. While the vendor focuses on quantifiable outcomes, clients are advised to seek specific outcomes, mitigate scope creep and ensure the advisory assignments create pathways to scale.
- **High ratio of junior staff:** Although Gartner estimates about one-third of Deloitte's revenue is asset-based, value delivery still depends largely on consultant hours. Deloitte operates a leverage model, led by more experienced consultants. Clients should ensure engagement teams have adequate senior leadership and expertise for complex transformations.
- **Human oversight and delivery governance:** Deloitte is pioneering the use of AI in its delivery of consulting services. While this is expected in the market, it comes with risk. Clients are advised to seek clarity on leverage of AI in the delivery of services and how potential risks are managed through the responsible use of AI, including "human in the loop" reviews.

DXC Technology

DXC Technology is a Niche Player in this Magic Quadrant. DXC reports having over 18,000 FTEs delivering DTBCS across all four use cases, geographically diversified with 9% of its DTBCS FTEs in the Americas, 39% in EMEA and 52% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 12% of this talent has less than five years of experience, while 70% has more than 10 years of experience.

DXC's top target executive sponsors in its customer organization are the CIO and CTO, as assessed by their share of contributions to DXC's consulting services revenue. Gartner estimates that about 90% of the provider's consulting engagements are won through competitive tenders, medium to small in scale, with 44% of them less than at \$1 million, 24% in the \$1 million to \$5 million range and 32% exceeding \$5 million.

Banking and insurance, manufacturing (discrete), and public sector are the vendor's top three focus industry verticals in 2026.

Strengths

- **Deep expertise and scalable talent model (inverted pyramid strategy):** DXC intentionally maintains a distinctive "inverted talent pyramid" with a highly experienced consulting workforce to ensure a deeper, high-quality impact for clients.
- **Strategic focus on technology consulting:** A substantial portion of DXC's resources (FTEs, IP assets, investments) are dedicated to technology consulting. Furthermore, revenue concentration remains high among technical buyers, with CIOs and CTOs accounting for 60% of DTBCS revenue. Clients with specific digital technology transformation needs can benefit from this strong technology advisory focus.
- **Engagement flexibility:** DXC's offerings, engagement model and pricing approach are highly flexible and offer clients a variety of engagement options. As demonstrated through its range of client and deal sizes, DXC is among the best in class in this cohort, making it a good choice for clients of all sizes.

Cautions

- **Skewed service portfolio:** While DXC has an evolving portfolio of AI offerings, inadequate predictive design services and a lack of process-centric consulting capabilities in the business consulting space impair its ability to execute for clients that have enterprisewide business reinvention or transformation needs. Non-IT business leaders considering DXC will need to ensure that the engagement is anchored in business value realization to avoid a technology-first bias.

- **Consulting assets and standards:** DXC lacks proprietary frameworks, benchmarks or indexes that have achieved the standard of broad, sustained external adoption by customer communities. This suggests their frameworks are currently internal tools or selectively adopted within niches, rather than widely accepted industry standards.
- **Slow pace of growth in capacity and capability:** The consulting business has reported revenue decline. Furthermore, DXC does not have an inorganic growth strategy. Slower organic capability building in a rapidly changing market hinders its ability to bring market leading capability to clients.

EY

EY is a Visionary in this Magic Quadrant. EY reports having over 80,000 FTEs delivering primarily DTBCS use cases with limited capacity in brand and marketing strategy consulting use cases. Its team is geographically diversified with 28% of its DTBCS FTEs in the Americas, 21% in EMEA and 41% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 82% of this talent has less than five years of experience, while 5% has more than 10 years of experience.

EY's top three target executive sponsors in its customer organization are the CIO/CTO, CRO and CFO, as assessed by their share of contributions to EY's consulting services revenue. Typically, 70% of the provider's consulting engagements are sole-sourced and substantial in scale, with 78% of them exceeding \$5 million.

Industrials and energy, consumer products (CPG), and healthcare are the vendor's top three focus industry verticals in 2026.

Strengths

- **Human-centric approach to change management:** EY utilizes its proprietary TransformationEQ framework, co-developed with Said Business School, to specifically focus on the human and emotional side of change programs. This methodology provides clients with a deliberate approach to mitigating the significant risk associated with human or organizational factors in large-scale transformations.
- **Deep industry and sector expertise:** EY's approach to structuring its teams across six industry groups and 18 sectors, coupled with dedicated industry boards and platforms like EY Nexus, enables the development and delivery of highly tailored, sector-specific solutions that address unique client challenges and regulatory landscapes.

- **Reinvention of service delivery by scaling investment in IP:** EY has invested significantly in scaling AI/GenAI capabilities, codifying its traditional consulting assets, developing AI-based workflows and reinventing service delivery. It is recommended that clients actively seek asset-heavy propositions to benefit from the cost and effort efficiencies these assets offer.

Cautions

- **Limited client adoption in outcome-based pricing:** EY's business model relies heavily on sole-sourced, fixed-price or time-and-materials deals with large enterprises. Clients should proactively pursue outcome-based engagements, leveraging EY's recent investments in AI assets.
- **High junior talent concentration:** Approximately 82% of the DTBCS workforce has less than five years of experience, largely due to skills intake from global delivery services (GDS). This reliance on junior staff, combined with low retention rates, may limit access to the deep expertise required for multiyear strategic transformations.
- **Gradual expansion of IP utilization:** EY has invested heavily in IP and plans to use it in all consulting engagements from 2026. However, its asset monetization strategy is still evolving, and most engagements remain people-based. Clients should ask EY to clarify how it leverages IP and shares commercial benefits.

HCLTech

HCLTech is a Niche Player in this Magic Quadrant. HCLTech reports having over 17,000 FTEs delivering DTBCS across all four use cases, geographically diversified with 24% of its DTBCS FTEs in the Americas, 20% in EMEA and 59% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 36% of this talent has less than five years of experience, while 22% has more than 10 years of experience.

HCLTech's top three target executive sponsors in its customer organization are the CIO/CTO, COO and CMO, as assessed by their share of contributions to HCLTech's consulting services revenue. Typically, 70% of the provider's consulting engagements are sole-sourced and substantial in scale, with 53% of them exceeding \$5 million and 2% in the \$500,000 to \$1 million range, indicating a strong focus on multiyear, large-scale, technology modernization, transformation consulting engagements.

Fabricating materials industry, e-mobility and government are the vendor's top three focus industry verticals in 2026.

Strengths

- **Strong consulting operations:** Characterized by a distinctive talent acquisition strategy, high talent retention rate, strong financial performance and unique origination, including the pursuit of a POD model and holistic measures for its consulting practice, HCLTech's ambition for its consulting business is supported by strong operations. Clients can benefit from this clarity and predictability.
- **Consistent customer experience:** HCLTech's Experience Management Office (XMO), a holistic customer experience measurement approach, is among the best in class in this cohort. HCLTech's investment in understanding its customers is paying off, as evidenced through the Gartner customer reference survey in which the vendor received high scores demonstrating a stable customer experience.
- **Strong innovation consulting expertise:** HCLTech stands out for co-creating with clients and contractually linking innovation to outcomes. Services like BEaaS enable ROI validation through experimentation, while Innovation-as-a-Service ties deliverables such as annual patent filings to measurable results.

Cautions

- **Reactive approach to detect and respond to market dynamics:** HCLTech's product-engineering-focused market sensing lacks proprietary methods, AI-based foresight tools and a dedicated team, limiting its ability to help clients adapt to changing market dynamics.
- **Strategic advisory limitations:** HCLTech demonstrates strong capabilities in product design and engineering services; however, its strategic consulting depth is limited. The provider lacks robust offerings in areas such as business reinvention, brand strategy and market-entry consulting. Clients seeking support for new product introductions or expansion into new markets may not find HCLTech's capabilities comprehensive to address their requirements.
- **People-based consulting model:** Despite its assertions around driving asset-led consulting, HCLTech's overall consulting revenue is linearly aligned to its headcount. Clients must require HCLTech to break down pricing to the component level and verify if it is paying for people or assets, and negotiate accordingly.

IBM

IBM is a Challenger in this Magic Quadrant. Gartner estimates IBM has over 80,000 FTEs distributed globally across the Americas, Europe, EMEA and the Asia/Pacific region, delivering DTBCS across all four use cases. (Note: Percentages may not add up to 100% because of rounding.) Approximately 38% of this talent has less than five years of experience, while 23% has more than 10 years of experience.

IBM's top three target executive sponsors in its customer organization are the CIO/CTO, COO and CFO, as assessed by their share of contributions to IBM's consulting services revenue. Typically, 43% of IBM's consulting engagements are sole-sourced, medium or small in scale, with 12% of them exceeding \$5 million and 66% at less than \$1 million.

Banking and financial services, government, and retail/consumer products (CPG) are the vendor's top three focus industry verticals in 2026.

Strengths

- **Internal transformation blueprint (Client Zero):** IBM uses its own internal transformation journey, dubbed "Client Zero," that spans multiple domains (delivery, HR, customer support, procurement, etc.) as a client-facing blueprint. The vendor publicly shares details of its IBM Consulting Advantage platform and the transformation outcomes it has delivered through its financial results, which offer strong proof points for clients as they evaluate IBM.
- **Proven co-creation methodology:** IBM Garage uses a collaborative, hands-on approach to quickly develop MVPs and drive innovation. By co-creating solutions, clients experience IBM's speed and expertise early, building trust before major commitments. This method helps organizations rapidly test ideas, reduce risk and achieve successful digital transformation.
- **Consultative assets and standards:** IBM has a heritage of developing industry standards. The IBM Institute for Business Value (IBV), its contribution to creating industry standards such as Open Standards Benchmarking (OSB) and the Component Business Model (CBM) are a testament to this strength.

Cautions

- **Prioritization on focus clients:** IBM's sales strategy is heavily anchored around its key clients, which concentrates its best talent and resources on top accounts. Clients are advised to put contractual measures in place to ensure adequate and appropriate resourcing and focus.
- **Growth challenge in key markets:** IBM's consulting revenue growth was relatively flat in 2025, as compared to the previous year, especially in its key market, the U.S. IBM has channelized investments in terms of leadership and resources to bring back the momentum. Clients in the U.S. are advised to consider this an opportunity to negotiate better outcomes.
- **High proportion of asset-based revenue:** IBM earns substantial revenue from asset-based offerings like proprietary IP and platforms. With codification of consulting into AI agents and solutions, clients will be institutionalizing IBM's approach to delivering specific business outcomes. Clients are advised to define clear risk postures and assess if IBM's approach to achieving outcomes suits their business objectives in the long run.

Infosys

Infosys is a Challenger in this Magic Quadrant. Infosys reports having over 10,000 FTEs delivering DTBCS across all four use cases, geographically diversified with 28% of its DTBCS FTEs in the Americas, 26% in EMEA and 45% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 29% of this talent has less than five years of experience, while 48% has more than 10 years of experience.

Infosys's top three target executive sponsors in its customer organization are the CIO/CTO, CFO and CMO, as assessed by their share of contributions to Infosys' consulting services revenue. Typically, 35% of the provider's consulting engagements are sole-sourced and medium or substantial in scale, with 24% of them exceeding \$5 million and 56% in the \$500,000 to \$1 million range.

Retail and consumer products (CPG), energy and utilities, and healthcare and life sciences are the vendor's top three focus industry verticals for 2026.

Strengths

- **Robust value realization framework:** The Infosys Value Management platform, powered by its proprietary Organization Performance Quotient framework, systematically links analysis to clients' key business levers. A significant share of DTBCS revenue comes from

outcome-based models, reflecting Infosys's commitment to aligning fees with measurable client value.

- **Strong strategy-to-execution model and outcome alignment:** Infosys employs a proprietary "strategy-to-execution" model, with an "AI-first philosophy" leveraging platforms like Infosys Topaz and the Infosys Value Realization Method (VRM), to ensure that digital transformation roadmaps lead to measurable results.
- **Integrated global consulting structure:** Infosys Consulting operates as a single, globally integrated management consulting firm within a large global system integrator (Infosys), which is a unique structure among its cohort. This enables clients with converged needs to get the best of the capabilities of a consulting firm and a global system integrator.

Cautions

- **Technology-centric consulting bias:** Infosys' consulting revenue is primarily attributed to technical buyers, with CIOs and CTOs accounting for more than half of its DTBCS revenue. Non-IT business leaders will need to proactively ensure the engagement is anchored sufficiently in their departmental and commercial KPIs to avoid a technology-first bias.
- **Limited relevance in corporate strategy engagements:** Infosys does work with clients on business strategy engagements; however, the vendor has limited capabilities around business model reinvention and new market entry strategy.
- **Reliance on external partnerships for regulatory compliance advisory:** While Infosys has a formal vertical compliance program covering multiple major verticals across all geographies, it actively uses alliances with audit firms (e.g., EY for Europe) to address specific, local compliance needs, such as local labor-law-compliant payroll. Clients need to be aware of such dependence.

McKinsey & Company

McKinsey & Company is a Leader in this Magic Quadrant. McKinsey reports having over 13,000 FTEs delivering DTBCS across all four use cases and leveraging QuantumBlack, which is McKinsey's consulting arm for AI-specific use cases. Gartner estimates McKinsey has a geographically diversified team: 45% of its DTBCS FTEs are in the Americas, 35% are in EMEA and 20% are in the Asia/Pacific region. (Note: Percentages may not add up to 100% because

of rounding.) Approximately 70% of this talent has less than five years of experience, while 9% has more than 10 years of experience.

McKinsey's top target executive sponsors in its customer organization are the CEO and COO, as assessed by their share of contributions to McKinsey's consulting services revenue. Notably, client CEOs continue to sponsor McKinsey and account for 30% of the company's revenue. Typically, McKinsey's consulting engagements are sole-sourced and substantial in scale, with 80% exceeding \$5 million.

Gartner estimates that McKinsey's priority verticals for 2026 are financial services, healthcare and life sciences, and energy and utilities.

Strengths

- **Proactive market sensing and thought leadership:** McKinsey employs a sophisticated approach to market sensing through proprietary tools like McKinsey Global Institute (MGI) and sector-specific research teams. The Digital & Technology Insights (DTi) hub leverages advanced AI to anticipate long-term shifts, geopolitical risks and industry trends.
- **Deep sector knowledge:** McKinsey's vertical expertise drives industry-level impact and client value. Its IP strategy digitizes domain knowledge with AI to deliver strategic solutions.
- **Mature change management and value realization:** The organization utilizes advanced proprietary tools to monitor and manage complex transformations. McKinsey demonstrates maturity in measuring change success by linking skills improvement, technology adoption and process efficiency directly to quantified business outcomes, leading to well-quantified productivity gains and transformation success rates.

Cautions

- **Premium pricing:** McKinsey's premium pricing is driven by the expertise and track record of senior partners. To ensure value realization, clients should seek top-tier partners that are directly and continuously involved in their engagements.
- **Monetization prioritized around high-impact challenges:** The firm's model is optimally aligned when solving monumental, multimillion dollar business crises. Clients with smaller, incremental or less "existential" problems may not receive the full benefit of McKinsey's distinctive, go-to-market model.

- **McKinsey IP ownership requirement:** McKinsey's consulting often includes proprietary assets, making IP a negotiated element. Clients should clarify IP ownership early, rather than assuming full rights to co-created tools or default terms.

NTT DATA

NTT DATA is a Niche Player in this Magic Quadrant. Gartner estimates NTT DATA has about 28,000 FTEs delivering DTBCS across all four use cases, geographically diversified with 16% of its DTBCS FTEs in North America, 57% in EMEA and 27% in the Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Approximately 47% of this talent has less than five years of experience, while 24% has more than 10 years of experience.

NTT DATA's top target executive sponsors in its customer organization are the COO, CIO and CTO, as assessed by their share of contributions to NTT DATA's consulting services revenue. Typically, 38% of the provider's consulting engagements are sole-sourced, medium to small in scale and typically embedded as part of a larger tech transformation, with 17% of them exceeding \$5 million and 47% at less than \$1 million.

Manufacturing, financial services, and communications, media and services are the vendor's top three focus industry verticals in 2026.

Strengths

- **Thought leadership in setting industry standards:** NTT DATA contributes to the development of global standards across diverse industries, including optical networking (IOWN), sustainability (SCI and related frameworks), financial interoperability, and digital twin ecosystems. Through co-creation with clients and partners, NTT DATA applies these standards in practical solutions that support industry-level transformation.
- **Asset-based consulting business model:** NTT DATA's core strategy is built on asset-based business (ABB), using its proprietary platforms like Syntphony. This approach is designed to accelerate time to market, increase scale and generate cost efficiencies by offering composable solutions for quick transformation.
- **Vendor lock-in avoidance via open standards:** Unlike many proprietary-platform-based consulting services offerings, NTT DATA's Syntphony solution is a flexible, customizable framework built on open standards with the goal of enabling true interoperability and removing vendor lock-in for clients.

Cautions

- **Fragmented client base and project landscape:** NTT DATA serves a diversified client base that includes global enterprises, midmarket organizations and public-sector institutions, and consulting is often delivered within larger multiphase transformation programs. Clients should closely monitor resourcing and project management.
- **Reliance on traditional pricing models:** Although NTT DATA is expanding to outcome-based pricing, particularly in multiyear cloud, AI and modernization programs, it continues to use traditional pricing models (T&M and fixed price) for a significant share of engagements. Based on their risk posture, clients must actively seek outcome-based propositions as applicable.
- **Capability differential between Japan and global markets:** NTT DATA's delivery scale, capability and expertise vary across regions, with Japan and Europe representing the most established bases. Clients in global markets must require NTT DATA to align delivery consistency through shared assets, CoEs and common consulting frameworks, and ensure knowledge sharing in multiregion programs.

Publicis Sapient

Publicis Sapient is a Niche Player in this Magic Quadrant. Gartner estimates Publicis Sapient having over 20,000 FTEs delivering DTBCS across all four use cases, with the majority of its DTBCS FTEs in North America and EMEA. (Note: Percentages may not add up to 100% because of rounding.) Approximately 20% of this talent has less than five years of experience, while 30% has more than 10 years of experience.

Its overall technology consulting is growing and its business consulting capabilities are fledgling. Publicis Sapient's top target executive sponsors in its customer organization are the CIO/CTO and CMO, as assessed by their share of contributions to Publicis Sapient's consulting services revenue. Typically, 30% of the provider's consulting engagements are sole-sourced and substantial in scale, with 60% of them exceeding \$5 million, 15% at less than \$1 million and 25% between \$1 million and \$5 million.

Banking and financial services, retail, and communications and media are the vendor's top three focus industry verticals in 2026.

Strengths

- **Creative, data, media and product engineering integration:** Publicis Sapient's "Power of One" model connects clients to the broader Publicis Groupe ecosystem, including top

data sources like Epsilon and Lotame. This integration enables unified marketing, commerce and technology strategies, delivering highly targeted and personalized experiences.

- **Rapid AI-enabled experience delivery:** Publicis Sapient's integrated SPEED framework (Strategy, Product, Experience, Engineering, Data & AI) accelerates transformation by connecting strategy to delivery and eliminating silos. Leveraging proprietary platforms and agile, AI-driven methods, SPEED delivers measurable business impact in weeks or months.
- **Technology modernization advisory expertise:** Publicis Sapient draws on its heritage to deliver advanced technology solutions and large-scale transformation particularly for complex, regulated sectors like financial services and energy.

Cautions

- **Lower strategic focus on core digital business consulting:** Publicis Sapient is best known for martech and customer engagement, with less recognition for nonmarketing business consulting. Recent acquisitions leading up to June 2025 focused on marketing, commerce and media, not business model reinvention.
- **Limited proprietary IP portfolio compared to scale players:** As compared to its peers in this cohort, Publicis Sapient has a limited portfolio of IP assets. This also reflects in its low volume of asset based revenue as a percentage of its overall revenue.
- **Reliance on proprietary telemetry for trust and pricing verification:** The firm promotes a competitive differentiator through its Slingshot platform, which provides telemetry on speed, quality and cost where clients can see where efficiency is created, which is priced into the model. However, clients must assess if this dependency is viable for them.

PwC

PwC is a Visionary in this Magic Quadrant. PwC reports having over 45,000 FTEs delivering DTBCS across all four use cases, geographically diversified with 53% of its DTBCS FTEs in the Americas, 32% in EMEA and 15% in the Asia/Pacific regionPAC. (Note: Percentages may not add up to 100% because of rounding.) Approximately 41% of this talent has less than five years of experience while 20% has more than 10 years of experience.

PwC's top three target executive sponsors in its customer organization are the CFO, CIO and COO, as assessed by their share of contributions to PwC's consulting services revenue.

Typically, 80% of provider's consulting engagements are sole-sourced and substantial in scale, with 41% of them exceeding \$5 million, 26% at less than \$1 million and 33% in the \$1 million to \$5 million range.

Healthcare and life sciences, retail and consumer products, and energy and utilities are the vendor's top three focus industry verticals in 2026.

Strengths

- **Deep expertise In regulated industries:** PwC excels at navigating complex regulations with its "compliance by design" approach, integrating regulatory strategy, technology adoption and ESG disclosures.
- **Highly responsive to market shifts:** PwC has realigned its offerings to meet evolving client needs around future readiness, AI, regulatory shifts and demand for value-based pricing. Initiatives like AI Delivery Excellence and the Value-In Motion campaign evidence this shift. Clients can benefit from these investments as they navigate complex business environments.
- **Systemic approach to innovation:** As evidenced through significant investments, purposeful partnerships (global and regional), an institutionalized client co-creation methodology, and a growing network of innovation labs and centers, PwC's innovation capabilities are among the best in class in this cohort.

Cautions

- **Evolving marketing and digital product engineering consulting capability:** While PwC has recently been growing the capability inorganically, its capabilities and offerings in marketing, brand transformation and digital product engineering are still evolving. These capabilities are embedded within its technology consulting practice. Clients must seek customer references to validate claims.
- **Reliance on people-based services:** The majority of PwC's DTBCS revenue is based on people-based services. While PwC invests in IP to improve internal efficiencies, it does not articulate a clear asset monetization strategy. Clients must seek clarity at a component level when negotiating deals to understand the value drivers.
- **Heavy concentration in finance and operations transformation:** A high percentage of PwC's engagements originate from the CFO and COO buyer profiles. Clients engaging

PwC for IT strategy mandates driven by nonfinancial leadership will need to ensure that value realization goals are aligned to their departmental/functional KPIs.

TCS

Tata Consultancy Services (TCS) is a Niche Player in this Magic Quadrant. TCS reports having over 50,000 FTEs delivering DTBCS across all four use cases. TCS's consulting revenue is reliant on people-based services. Gartner estimates the TCS talent pool to be geographically diversified, with 45% of its DTBCS FTEs in the Americas, 35% in EMEA and 20% in the Asia/Pacific region, and heavily skewed to technology consulting. (Note: Percentages may not add up to 100% because of rounding.) Approximately 35% of this talent has less than five years of experience, while 35% has more than 10 years of experience.

TCS undertakes consulting engagements with an intent to deliver downstream implementation services. The vendor's top target executive sponsors in its customer organization are the CIO/CTO and COO, as assessed by their share of contributions to TCS's consulting services revenue. Typically, 25% of the provider's consulting engagements are sole-sourced and medium to small in scale, with 15% of them exceeding \$5 million, 40% at less than \$1 million and 45% in the \$1 million to \$5 million range.

Banking and financial services, consumer products (CPG), and communications and media are the vendor's top three focus industry verticals in 2026.

Strengths

- **Strategic client focus and execution:** TCS has a relationship-based growth model, with about 80% of wins being sole-sourced and nearly 95% of growth coming from existing clients over the past two decades. This deep integration with clients supports long-term engagements and significant outcome delivery.
- **Advanced innovation and co-creation ecosystem for technology consulting:** TCS leverages proprietary ecosystems like COIN and Pace Ports structured co-innovation centers, bringing together clients, startups and academia to accelerate digital transformation through rapid prototyping.
- **Institutionalized contextual knowledge:** Given that TCS does not monetize its consulting assets explicitly, the premium pricing for consulting is attributed to its senior workforce. TCS Gurukul and Contextual Masters Program (with approximately 75,000 resources)

ensure consistent upskilling and leveraging of experienced resources. Clients must explicitly seek personnel from these initiatives to be deployed on projects.

Cautions

- **Organizational ambiguity in consulting definition:** TCS integrates consulting across services for on-demand delivery, but this limits niche consulting growth and stand-alone advisory capabilities beyond tech modernization.
- **Fledgling business and brand strategy consulting expertise:** TCS has limited business, strategy, marketing and brand strategy consulting expertise. Clients seeking advisory support for new market launches or business model reinvention may find TCS's capabilities to be still developing.
- **Reliance on organic capabilities:** TCS's emphasis on organic growth and internal resources limits its access to outside perspectives and specialized expertise, which are essential in today's dynamic environment. Clients should seek clarity on how TCS will incorporate external insights and best-in-class capabilities from the broader ecosystem.

VML

VML is a Niche Player in this Magic Quadrant. VML reports having over 4,500 FTEs delivering DTBCS across all four use cases, geographically concentrated with 45% of its DTBCS FTEs in the Americas and 47% in EMEA. (Note: Percentages may not add up to 100% because of rounding.) Approximately 15% of this talent has less than five years of experience, while 60% has more than 10 years of experience.

VML has fledgling business consulting and digital product engineering consulting capabilities. Its top executive sponsor in its customer organization is the CMO, as 30% of its deals originate from its customers' marketing function. Typically, 80% of the provider's consulting engagements are won through competitive tender and are substantial in scale, with 50% of them exceeding \$5 million and 15% in the \$500,000 to \$1 million range.

Automotive, healthcare and pharmaceuticals, and retail and consumer products (CPG) are the vendor's top three focus industry verticals in 2026.

Strengths

- **Integrated transformation focus:** The firm successfully executes its "Connected Brands" strategy, integrating brand experience, customer experience and commerce capabilities

to deliver quantifiable market impact. VML uses proprietary systems like WPP Open to enhance its operations and consulting delivery.

- **Customer experience management:** VML has one of the largest and widest array of clients across industries among companies assessed in this cohort. Its structured peer-to-peer learning opportunities for clients like Nudgestock (the world's largest festival of behavioral economists) and its delivery of a consistent client experience differentiates it from among its peers.
- **Strong operations:** Backed by WPP, VML can accelerate inorganic growth and capability expansion. Recent acquisitions have enhanced its global capacity, while specialized practices like behavioral science and proprietary tools such as Cognitive Profiler enable differentiated experience transformation services.

Cautions

- **Limited standardization of outcome-based pricing:** Clients seeking predominantly outcome-based commercial arrangements should discuss their specific requirements early in the engagement process. VML's three-tier value measurement framework provides a solid foundation for structuring such arrangements, although clients should be prepared to negotiate the appropriate balance between traditional T&M models and outcome-based structures that align with their transformation objectives and risk tolerance.
- **Domain focus limitation:** VML's primary business continues to be related to martech, sales tech, commerce tech and CX. While it is expanding to adjacencies and leveraging AI to open doors, the plan for scaling its consulting business beyond these core domains (e.g., into broad finance or HR transformation) is still fledgling.
- **IP asset volume:** VML has a lower number of proprietary IP compared to other vendors in this cohort. Furthermore, its heavy reliance on revenue from people-based services as compared to asset-based services indicates a lack of codified domain expertise, which typically accelerates industry-specific transformation projects.

Wipro

Wipro is a Niche Player in this Magic Quadrant. According to Gartner estimates, Wipro has over 23,000 FTEs delivering DTBCS across all four use cases and a geographically diversified talent pool, with 24% of its DTBCS FTEs in the Americas, 8% in EMEA and 68% in the

Asia/Pacific region. (Note: Percentages may not add up to 100% because of rounding.) Wipro has unified Capco (financial services advisory), Designit (service/experience design), Rizing (business transformation) and its internal domain consulting practices. Approximately 26% of this talent has less than five years of experience, while 51% has more than 10 years of experience.

Gartner estimates that Wipro's top target executive sponsors in its customer organization are the CIO/CTO and CFO, as assessed by Wipro's capabilities and offerings. Typically, 20% of the provider's consulting engagements are sole-sourced and medium to small in scale, with 29% of them exceeding \$5 million, 40% at less than \$1 million and 31% in the \$1 million to \$5 million range.

Banking and insurance, energy and resources, and healthcare and life sciences are the vendor's top three focus industry verticals in 2026.

Strengths

- **Elite talent development:** Wipro stands out for its consulting talent strategy, with a high proportion of experienced professionals and significant investment in training and upskilling at the partner level. Large enterprises in sectors like financial services and energy choose Wipro for enterprisewide transformation consulting.
- **Execution-focused advisory proposition:** Consulting-led sales is a CEO and board mandate, and Wipro prioritizes engagements with strong potential for downstream technology projects. Clients seeking transformation or modernization advisory services can benefit from this approach, securing competitive pricing for advisory services in lieu of commitment to implementation.
- **Engagement flexibility:** Wipro offers greater engagement flexibility, with consultants embedded in client teams and diverse pricing models. Both large and smaller clients benefit from this adaptability.

Cautions

- **Lack of proprietary market sensing capability:** Despite recent AI-based enhancements to its market sensing capability, Wipro's approach to market understanding heavily relies on customer feedback loops, co-creation and traditional intelligence tools, limiting differentiated foresight and the ability to redesign or reframe client business.

- **Offshore heavy talent model:** While Wipro maintains a viable onshore presence in key markets like North America and Western Europe, it deliberately pursues an “India hub”-based operating model for consulting services. Clients should evaluate whether Wipro’s staffing and operating models meet their needs.
- **Pivot to adaptive pricing is maturing:** The shift to outcome-based and risk-aligned commercial models is scaling slowly as the firm is focused on reversing the revenue decline. Clients should verify pricing claims and value realizations.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

As this is a new Magic Quadrant, no vendors were added.

Dropped

As this is a new Magic Quadrant, no vendors were dropped.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers:

- Need \$1 billion in combined revenue for digital business consulting and digital technology and cloud enablement consulting services.
- Must be able to deliver three out four use cases as described in the Market Definition section:
 - Must deliver the digital business consulting service use case

- Must deliver the digital technology and cloud enablement consulting service use case
- Must deliver either the digital product engineering consulting or digital marketing and brand strategy consulting use case. If delivering both use cases, the combined revenue must be at least \$150 million or, if delivering only one of these two use cases, revenue for the use case must be at least \$100 million.
- This is a worldwide MQ — global presence and ability to serve clients across all geographical regions (North and South America, Europe, Middle East, Africa, Asia and Oceania) is mandatory.

Honorable Mentions

Alten: Based in Boulogne-Billancourt, France, Alten is a global technology consulting and engineering leader operating across Europe, North America and Asia. Its consulting services center on outsourced R&D strategy, innovation management and digital transformation for engineering-intensive industries. Key verticals include aerospace, automotive, rail, energy and life sciences. Alten's proposition emphasizes strategic advisory for product life cycle optimization, sustainability and regulatory compliance. Proprietary IP includes methodologies for information systems security and risk mapping in complex engineering programs. In 2024 and 2025, Alten strengthened its consulting footprint through acquisitions in energy and utilities, positioning itself as a trusted advisor for industrial digitalization and green engineering.

Booz Allen Hamilton: Headquartered in McLean, Virginia, Booz Allen Hamilton operates primarily in the U.S., with a strong presence in defense, intelligence, and civil government markets. Its consulting proposition focuses on strategy and technology advisory for mission-critical programs, emphasizing AI adoption, cybersecurity and digital modernization. Key verticals include national security, defense and federal civil agencies. Booz Allen Hamilton's consulting IP includes frameworks for AI-driven transformation and cyber risk management, supported by proprietary analytics platforms. In FY25, the firm advanced its position as a premier digital integrator, leveraging deep government relationships and advisory-led innovation to guide clients through modernization and emerging tech adoption.

Cognizant: Headquartered in Teaneck, New Jersey, Cognizant operates globally across North America, Europe and Asia, serving industries such as financial services, healthcare, life sciences, retail, communications, media, technology and manufacturing. Its consulting proposition emphasizes AI-driven business transformation, enterprise modernization and

operational strategy. In 2024 and 2025, Cognizant focused on hyperproductivity through AI, embedded engineering and agentic automation, supported by proprietary platforms like Cognizant Neuro AI and Cognizant Flowsource. Consulting IP includes frameworks for responsible AI adoption and enterprise agentification, enabling clients to scale generative AI initiatives. Cognizant differentiates through domain expertise and advisory-led innovation, helping enterprises navigate complex digital and sustainability challenges.

EPAM: Headquartered in Newtown, Pennsylvania, EPAM operates globally across North America, EMEA and the Asia/Pacific region, serving industries such as financial services, healthcare, retail and technology. Its consulting proposition emphasizes digital business advisory, customer experience strategy and enterprise transformation. EPAM's consulting focus in 2024 and 2025 included AI-native operating models, cloud strategy and data-driven innovation. Proprietary IP includes frameworks for GenAI adoption and digital platform engineering, reinforced by acquisitions like First Derivative for financial consulting. EPAM differentiates through a deep engineering heritage combined with strategic advisory, helping clients reimagine business models and accelerate transformation in an AI-driven economy.

KPMG: Headquartered in London, U.K. (KPMG International), with major U.S. operations, KPMG delivers consulting through its advisory practice, operating worldwide across sectors such as financial services, healthcare, energy and consumer markets. Its consulting proposition focuses on sector-specific business transformation, risk and compliance, and digital strategy. This is underpinned by the KPMG Velocity platform and ecosystem designed for integrated transformation. Key focus areas in 2024 and 2025 included KPMG Velocity's AI-enabled products and services for enterprise change, ESG advisory and finance transformation. Proprietary IP encompasses KPMG's consulting insights, methods, expertise and capabilities, along with its Connected, Powered, Trusted, and Elevate solutions with AI technology. KPMG helps guide clients through complex regulatory and digital challenges, enabling them to build and operate intelligent, agile and resilient enterprises that can sustain their next level of growth and value creation.

Leidos: Headquartered in Reston, Virginia, Leidos operates primarily in the U.S. federal market, serving the defense, intelligence, civil and health sectors. Its consulting proposition focuses on mission-critical advisory, combining strategy with advanced technology insights for national security, cyber resilience and digital modernization. Key verticals include defense systems, healthcare and energy infrastructure, aligned with its NorthStar 2030 strategy. Consulting engagements emphasize AI-enabled cyber operations, risk

management and modernization of federal programs. Notable intellectual property includes proprietary frameworks for zero-trust cybersecurity and mission analytics. Leidos differentiates through deep domain expertise and advisory-led transformation for government clients seeking efficiency and resilience.

Evaluation Criteria

Product or Service: The capabilities, features and overall quality of the core goods and services that compete in and/or serve the defined market. Criteria include:

- Talent strategy
- Service catalog
- Diversity of skills

Overall Viability: The organization's overall financial health, as well as the financial and practical success of the relevant business unit. This includes the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio. Criteria include:

- Financials (growth and margins)
- Client growth and retention
- Diversity in business/capability offerings

Sales Execution/Pricing: The organization's capabilities in all presales activities and the structures that support these activities. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. Criteria include:

- Sales effectiveness
- Diversity in deal/client portfolio

Market Responsiveness/Record: The ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This includes the provider's history of responsiveness to changing market demands. Criteria include:

- Mechanisms to track and respond to market changes
- Leverage of AI
- Track record of market responsiveness

Marketing Execution: The ability to deliver clear, high-quality, creative and effective messaging via publicity, promotional activity, thought leadership, social media, referrals and sales activities. This includes the organization's ability to influence the market, promote the brand, increase awareness of products and establish a positive reputation among customers. Criteria include:

- Mind share among business buyers
- Demonstration of market driven thought leadership

Customer Experience: The degree to which a vendor's products, services and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical support or account support, as well as ancillary tools, customer support programs, availability of user groups and service-level agreements. Criteria include:

- Customer reference surveys
- Ability to create and curate customer community
- Successful client experiences

Operations: The ability of the organization to meet its goals and commitments. This includes the quality of its organizational structure, skills, experiences, programs and systems that enable the organization to operate effectively and efficiently. Criteria include:

- Talent acquisition and retention strategy
- Agility of the organization structure
- Training and upskilling/reskilling
- Leverage of AI to enhance efficiency and quality of service delivery

Ability to Execute

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	Medium
Operations	High

Source: Gartner (January 2026)

Completeness of Vision

Market Understanding: The ability to understand customer needs and translate that understanding into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and they can shape or enhance market changes with their vision. Criteria include:

- Ability to spot market trends
- Maturity of approaches (tools/methodologies) to track market disruptions, geopolitical and/or regulatory shifts
- Ability to understand buyer behavior

Marketing Strategy: The ability to clearly communicate differentiated messaging, both internally and externally, through social media, advertising, customer programs and positioning statements. Criteria include:

- Differentiated marketing strategies

Sales Strategy: The ability to create a sound strategy for selling that uses the appropriate networks including direct and indirect sales, marketing, service and communication. This includes partnerships that extend the scope and depth of a provider's market reach, expertise, technologies, services and their customer base. Criteria include:

- Differentiated sales strategies
- Approach to deal qualification and pursuit of opportunities

Offering (Product) Strategy: The ability to approach product development and delivery in a way that meets current and future requirements, with an emphasis on market differentiation, functionality, methodology and features. Criteria include:

- Offering strategy, differentiated capabilities
- Spread and leverage of centers of excellence
- Investment in offerings and leverage of AI
- Ability to set industry standards

Business Model: The design, logic and execution of the organization's business proposition. Criteria include:

- Ability to compete in marketplace
- Ability to work with clients of varying sizes and complexities
- Leverage of assets/IP
- Use of outcome based pricing and innovative commercial models

Vertical/Industry Strategy: The ability to strategically direct resources (sales, product, development), skills and products to meet the specific needs of verticals and market segments. Criteria include:

- Investment in industry-specific IP
- Distribution and variety of clients across industries and geographies
- Vertical strategy

- Thought leadership/expertise in industry vertical

Innovation: Marshaling of resources, expertise or capital for competitive advantage, investment, consolidation or defense against acquisition. Criteria include:

- Investment in AI
- Strength of partnership and ecosystem
- Innovation process, frameworks and methodologies
- Case examples demonstrating innovation

Geographic Strategy: The ability to direct resources, skills and offerings to meet the specific needs of regions outside the providers’ home region, either directly or through partners, channels and subsidiaries. Criteria include:

- Local/regional alliances and partnerships
- Geographic strategy
- Regional talent strategy

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Innovation	Medium

Source: Gartner (January 2026)

Quadrant Descriptions

Leaders

Digital technology and business consulting services (DTBCS) Leaders are characterized by their ability to fundamentally reinvent or reorient the business of client organizations across all four use cases as assessed in this Magic Quadrant. The leaders shape the market narrative. They have highly differentiated proprietary capabilities to sense market shifts. Their frameworks and tools are considered industry standard and are used widely by clients across industries. They have codified their deep knowledge of industry-specific processes and subprocesses into AI-powered toolkits and solutions. Demonstrated through transformative client experiences and case studies, Leaders stand out by their ability to underwrite business outcomes and structure commensurate commercial arrangements. Leaders have global reach and differentiate through nuanced regional capabilities, go-to-market strategies and partnerships. They proactively adapt their offering strategy. Not only do Leaders demonstrate a deep understanding of how AI affects the overall consulting business, but they also leverage AI across all facets of service delivery with a high level of maturity. Their investment and purposeful approach to curating their talent pool enables them to command a premium for their people-based services.

Challengers

Challengers in DTBCS have a balanced portfolio across all four use cases as assessed in this Magic Quadrant. Challengers typically have strong operational foundations, reflected in their depth and breadth of service offerings, market responsiveness, talent management, and service delivery models. Although there are pockets of highly specialized capabilities, providers in this quadrant are characterized by the breadth, rather than depth, of their offerings. They service clients across a range of industry verticals and have a balanced portfolio across the four use cases. Be it offering nuanced services or realigning their go-to-market propositions, Challengers are highly responsive to market trends. They have

capitalized on AI by adopting it across their portfolio and consulting service delivery. Challengers are still developing their proprietary market sensing capabilities, especially at an industry or domain level. The tools and frameworks offered by Challengers, while effectively used widely in client engagements, are yet to be recognized as industry standard benchmarks. Challengers are often considered to be fast followers with regard to their offering strategy. They tend to industrialize execution and hence adopt a global geographic strategy with limited differentiation at a regional level.

Visionaries

Visionaries in this Magic Quadrant articulate a sophisticated and forward-looking understanding of the DTBCS market. Many of the benchmarks, indexes and tools developed by the Visionaries are widely recognized as industry benchmarks. They have strong offerings and go-to-market strategies that are well-supported by a geographic strategy. The providers in this quadrant differentiate themselves through highly purposeful regional and/or vertical/industry strategies that give them a significant competitive edge. Visionaries expand the horizons of the provider market by leading with innovative business models, pioneering new service offerings or capabilities, driving path breaking innovation and IP, and curating peer-learning forums and opportunities for clients. Visionaries specialize in specific domains, leading to uneven maturity in their offerings across use cases. The providers assessed as part of this quadrant were still evolving their offerings, resourcing and capabilities in at least two of the four use cases. Operational agility constrained by organizational models, traditional talent structures and an inability to shift market perceptions about their strong heritage positions deters the ability of Visionaries to fully capitalize on market opportunities.

Niche Players

Niche Players focus their efforts and investment on specific segments of the DTBCS market. Within their chosen niche, which is typically one or, at best, two use cases as assessed in this Magic Quadrant, they have a strong ability to execute. These providers often receive positive client feedback, demonstrating leadership within a confined scope. Niche Players use publicly available market sensing frameworks and consulting methodologies, but differentiate through their deep understanding of client's operational constraints in a given domain (technology consulting or marketing/brand strategy consulting, or new product development) and their strong operating foundations. Their offering strategy is rooted in pragmatism and "art of the possible," rather than driving fundamental business shifts. Niche Players are considered a credible alternative to Leaders in their chosen niche. Furthermore,

they operate with inverted talent pyramids, which enables them to command a premium for their people-based services. The providers in this quadrant demonstrate market responsiveness by adopting aggressive inorganic growth strategies to augment their capabilities. Leveraging their global reach and technology services heritage, most providers in this quadrant leverage AI as an opportunity leveler rather than a differentiator.

Context

Business-outcome-based commercial arrangements are now possible in digital consulting services. While the outcome-based models were commonplace in the pure business strategy consulting world, digital technology consulting services were immune to this model as there was a certain degree of separation between the consulting engagement and business outcomes. With AI, this degree of separation is decreasing rapidly.

The business and technology consulting landscape is converging. Traditional strategy firms, Big 4 professional services, global system integrators (GSIs) and digital/marketing specialists increasingly offer end-to-end consulting services that span strategy, technology and engineering. Buyers will see more “one-stop” narratives, but differentiation will depend on which CxO outcomes a provider can credibly own and which IP it can activate on day one.

Consulting is getting codified. The tacit knowledge of highly valued consultants, the nuanced business workflows, industry benchmarks/indexes and market sensing capabilities are now getting codified through AI agents and solutions. Consulting service providers use these capabilities to not only improve their competitive differentiation, but also to institutionalize their ways of working into the client’s technology DNA.

Navigating this transformed consulting services landscape requires a structured approach.

First, structure hybrid commercials if baselines, data access and measurement are sound. Anchor engagements on quantifiable outcomes (e.g., reduce cost-to-serve by 12%, compress NPI cycle time by 30%, increase first-contact resolution by 20 points). Tie provider scope and fees to these target states.

Second, match provider cohorts to buyer profiles within your organization and program phases. Big 4 and strategy consulting firms, with their governance depth and platformized delivery capability, are still the preferred choice for operating model redesign (CEO/CFO

agenda), whereas for digital core modernization (CIO/CDO agenda), GSIs with hyperscaler depth, reference architectures and security integration are a force to reckon with. As for the CMO/CX agenda, experienced agencies with AI marketing platforms are still the favorites. However, do not let the labels dictate your selection. Invest in assessing the providers to achieve your integrated transformation goals.

Third, evaluate IP for its depth through live demos, understand the dependencies and risks (data rights, licensing, derivative rights and portability) it creates, assess if the ways of working that are institutionalized through the AI agents is sustainable and scalable in your context. Also, importantly, validate how AI-based consulting assets are measured for value. Require an asset activation plan that details how a provider's IP (platforms and accelerators) will cut time to value and support at-risk pricing.

Finally, request credible change methodologies and KPIs for workforce enablement, acknowledging that people and processes account for most of the value realization. When assessing team composition, look for bilingual squads.

Market Overview

The consulting services market is undergoing a profound transformation, marked by a shift from traditional advisory models to AI-enabled, outcome-driven engagements. The global consulting market is projected to reach \$544 billion by 2029, reflecting a 6.0% CAGR in constant currency (see [Forecast Analysis: Consulting Services, Worldwide](#)). This growth is not evenly distributed; segments such as AI and GenAI consulting are forecast to grow at a 15.7% CAGR, while security-embedded consulting is expected to permeate 43% of IT engagements by 2029, up from 30% in 2024.

The providers assessed in this Magic Quadrant delivered more than \$175 billion dollars worth of digital technology and business consulting services from July 2024 to June 2025 (for a detailed market share analysis, see [Market Share Analysis: Consulting Services, Worldwide, 2024](#)).

Enterprises are reshaping the procurement landscape through evolving priorities and personas. Boards of organizations are setting expectations with their executive teams on speed to impact, particularly from AI and other transformation initiatives that involve technology. This is shaping the composition of economic buyers in a client organization. The influence of CIO on CxO decisions is growing as every business strategy involves an AI

strategy. The CFO is emerging as a key stakeholder, especially as the consulting engagements become value-based or outcome-based engagements. CMOs and chief digital officers continue to own the digital brand and experience transformation for organizations, but now include CIOs in their initiatives as the transformation becomes tech-centric. Meanwhile, decentralized buying is prevalent among technology transformation initiatives, reflecting the permanent shift to business-led IT procurement models. This fragmentation requires providers to navigate complex stakeholder landscapes and tailor propositions to functional outcomes.

Pure outcome-based pricing, still, is a holy grail. While the leveraging of AI in consulting has breathed life into the value-based pricing and gain-sharing constructs, their adoption is still growing. Fixed-price and T&M contracting models still are the most common commercial models. The Gartner customer reference survey conducted for this Magic Quadrant further evidences this, as only 10% of the deals delivered by the vendors in this cohort are structured in revenue-at-risk/gain-sharing models. Furthermore, many providers caution that outcome-based pricing remains selective, dependent on client maturity, trust and transparency, data readiness, and governance clarity.

AI is the most transformative force reshaping consulting services as the market moves from experimentation to scaled execution. Consulting is increasingly software-augmented, with agentic systems automating and orchestrating complex workflows. AI platforms from service providers are transforming consulting delivery into persistent, AI-instrumented pipelines. Delivery models are evolving toward bundled advice-build-run engagements. AI is also reshaping pricing strategies. As effort compresses, providers seek to tie fees to outcomes, speed to value and IP activation.

The evolution of service provider offerings is tightly linked to IP strategies and ecosystem alliances. Providers are industrializing consulting IP into AI-enabled platforms that encode patterns, data, benchmarks and workflows. Deloitte's RegExplorer, Bain's ARC, and Infosys' Topaz exemplify this trend. These platforms derisk outcomes, shorten time to production and support value-based pricing. Furthermore, we see an increased focus from providers on monetizing platforms and frameworks through licensing and productized services. This decouples pricing from effort and aligns fees with business impact.

Ecosystem partnerships are becoming identity-defining. Dedicated business groups or go-to-markets with Microsoft, AWS and Google Cloud signal a strategic pivot from vendor neutrality to platform-aligned consulting identities.

Strategy firms and some Big 4 providers maintain high sole-sourced rates, reflecting trust-based expansion. Accenture is an outlier in the global system integrator (GSI) segment, with a significantly higher ratio for sole-sourced deals, indicating embedded partner status. In contrast, GSIs win the majority of work through competitive tenders. Deal sizes are ballooning upward, with large-scale engagements (over \$5 million) dominating revenue. Even smaller discovery sprints often serve as staging grounds for scaled programs. Gartner's customer reference survey confirms this trend (75% of the consulting engagements delivered by this cohort of providers cost over \$1 million per engagement).

The metrics used in consulting services are evolving. Traditional metrics like billable hours and utilization rates are being supplemented with outcome-linked KPIs such as cost-to-serve reduction, revenue lift and cycle-time compression. Providers are embedding measurement cadences, weekly burn-downs, monthly value ledgers and quarterly governance reviews to demonstrate accountability and justify premium pricing. Unique metrics include agent productivity, IP activation rates and AI-assisted delivery efficiency.

Talent strategies are diverging across cohorts. Junior-heavy pyramids among companies with a consulting heritage emphasize scale economics and industrialized training, but AI is shrinking traditional entry roles, necessitating rapid upskilling and role redesign. Midcareer "diamond" models among specialists and niche global system integrators are primarily driven by the need for hands-on practitioners for product and engineering speed. Senior-heavy models from GSIs justify their premium pricing and also align to more complex work and the projects they are picking up in regulated domains. Providers are creating bilingual squads (business plus AI/engineering), redesigning roles (prompt engineers, agent orchestrators) and deploying AI-assisted learning to bridge experience gaps.

In conclusion, the consulting market is being rearchitected around AI-first, outcome-anchored, platform-enabled delivery. Growth will be strongest where providers couple credible IP, deep ecosystems and security-embedded execution with commercial structures that share accountability for results. CxO buyers must select partners based on fit to outcomes and governance readiness, not legacy category labels. By holding service providers to production-grade blueprints, hybrid value-linked commercials and responsible AI guardrails, buyers can turn today's hype into a durable performance engine for the next five years.

⊕ Evaluation Criteria Definitions

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