HFS

HORIZONS REPORT

Customer Experience Services, 2026

An assessment of the customer experience service providers landscape in the GenAI and agentic AI era

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Excerpt for Capgemini

Customer experience is being redefined for an AI-native, outcome-first economy. The market is moving from buying capability to accountability, and business-aligned execution matter more than generic AI claims

Providers can no longer win by promising growth while delivering only efficiency. The real test now is whether they can demonstrate repeatable impact and measurable business value. The next era of CX will belong to providers that can prove impact, not just pitch ambition.

Krupa K S
Senior Analyst, HFS Research

The same AI that is raising customer expectations is quietly stepping between brands and their customers. As AI assistants and AI-mediated search become the interface, enterprises risk becoming invisible inside their own customer journeys.

The brands that thrive will fight to stay present in the moments that matter, because a customer you never connect with is a customer you no longer know.

Jason Dann
Research Analyst, HFS Research

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1 Introduction and research methodology

Introduction

Customer experience is entering its AI-native era, as generative AI (GenAI) and agentic AI become the core of service delivery. This ***HFS Horizons: Customer Experience Services, 2026*** study is designed to assess vendor capabilities, innovation, and value potential across the value chain based on a range of dimensions to understand the *why, what, how,* and so what of their service offerings across three distinct horizons:

- **Horizon 1:** The ability to drive functional transformation through cost reduction, speed, and efficiency and leverage advanced technologies such as GenAI, analytics, and automation to optimize customer experience (CX) functions
- **Horizon 2:** Horizon 1 + the ability to transform end-to-end customer experience across front, middle, and back office with a OneOffice mindset (e.g., unified customer journeys across channels, agent copilots, connected case-to-resolution workflows)
- **Horizon 3:** Horizon 2 + the ability to drive entirely new sources of value with a OneEcosystem approach (e.g., creating an agentic Customer Resolution Hub that unifies brands and partners (logistics, payments, field service, warranty/repair, marketplaces) to predict issues, autonomously resolve them end-to-end, and prevent recontact, AI-powered experience ecosystems)

The report evaluates the capabilities of 33 service providers, including CX specialists, global system integrators, and consultancies across the HFS customer experience services value chain.

It highlights the value-based positioning of each participant across the three distinct Horizons. It also includes detailed profiles of each service provider, outlining their facts, strengths, and development opportunities.

The report is global in scope and offers critical insights for enterprises of all shapes and sizes, service providers offering customer experience services, and ecosystem partners navigating the GenAI and agentic AI era.

Executive summary (1/2)

1 Horizon 3 service providers revealed

The leaders in this study, Horizon 3 service providers, separate themselves by what they can prove rather than what they pitch. They own the technology layer, using proprietary and often patented agentic platforms and domain-specific agent libraries built on their own IP. They span the full stack from consulting to operations while advising in the boardroom, executing on the floor, and meeting the demand for one partner accountable for the entire journey. They also show the strongest signs of growth outcomes, including revenue and customer lifetime value while co-creating new business models with clients and ecosystem partners. In a market that sounds increasingly alike, these leaders demonstrate the agentic, outcome-led model.

2 What enterprises need from CX service providers

Enterprises are not short on capability. They have the required tools, platforms, and pilots. What they lack is a partner accountable for turning that investment into a business result. As a result, the demand in 2026 has shifted from buying capability to buying accountability. Enterprises are tired of stitching together vendors and tools and want a single owner for the entire journey. That partner must connect AI to the outcomes that matter (cost-to-serve, retention, and growth), priced on the value delivered and applied to real problems rather than the latest tool. It must scale AI into production and stay embedded enough to advise and take the lead rather than wait to be steered. With trust as the precondition, enterprises need a partner that ensures governance and security to manage customer-facing AI.

3 How CX service providers are meeting enterprise needs

Providers have responded with similar strategies: a proprietary platform, deep domain expertise, end-to-end ownership, and a similar cohort of technology partners. The trouble is that sameness; when everyone offers similar models on similar platforms, the pitch itself stops setting anyone apart, and capability becomes the expectation. The real separation now lies in capabilities that are slow to build but necessary for innovation: proprietary data, owned IP, operating model, and outcome-based commercial models. In practice, what arrives today is AI-augmented operations with agent assist and real-time guidance, automated quality across whole interaction volumes, conversational and voice AI that lifts containment, and copilots that compress handling time. The agentic, self-running version is mostly still being built. The leaders deliver it the same way they built it: first in their own operations and then through centers of excellence and forward-deployed pods.

Executive summary (2/2)

4	**Voice of the customer**	Clients are harder graders than partners, but what they value is genuine. Execution, talent, and domain depth draw consistent praise, with domain expertise as a strength that clients never ask to fix. However, they described an operational engine more than a growth engine, where efficiency and containment improve while personalization, new commercial models, and revenue stay at the bottom of what they actually receive. The things they want fixed are telling, cost transparency and strategic advisory, the higher-value work that separates a vendor from a partner. Clients trust their providers to run the operation but may still be waiting for them to take the lead.
5	**Voice of the partners**	Partners are more bullish than clients. They are more confident that AI can own CX outcomes, indicating that the people closest to the technology are the most optimistic about where it can land. Partners grade providers more generously across every dimension, crediting both a clear vision for the future and a deep command of today's technology stack. Their main ask is to make co-innovation repeatable, turning one-off wins into a packaged, scalable joint motion. Even the believers see the gap; strong innovation does not yet translate into consistent delivery at scale. The message is forward-leaning, but the ecosystem believes in the model and is waiting for providers to deliver it.

The HFS customer experience value chain, 2026

CX design and strategy services are the key foundational topics covered in this analysis

Customer experience services

CX strategy and operating model

- CX vision, value proposition, experience principles
- Target operating model (people/process/tech), governance, funding model
- Journey-based organizational design

Journey orchestration and experience design

- End-to-end journey mapping
- Omnichannel experience orchestration
- Service design interaction design, UX/UI
- Accessibility, inclusive design, content design

Commerce and sales experience

- Ecommerce strategy and build
- Product information management
- Checkout, payments, order management integration
- Sales process redesign, enablement
- Lead-to-cash journey, partner/channel experience

Digital product and channel engineering

- Digital experience design and build (web, mobile, portals), portals, self-service experiences
- Experience platforms (DXP/CMS), mobile frameworks, and QA/testing
- API-led channel enablement, integration, and middleware

Lifecycle orchestration and service-to-revenue design

- Lifecycle strategy and segmentation
- Journey architecture and cross-channel orchestration

Customer insights, VoC and journey analytics

- VoC program design and insight ops
- Journey analytics and experience mining
- Customer research and segmentation insights
- KPI definition and measurement design

Operations

Sales | Marketing | Customer Service

Omnichannel CX across

Voice | Messaging | SMS | Email | Chatbots | Retail and face-to-face | Social media | Web and mobile app | Video kiosk | Self-service portals / Help center

Enabling technologies

GenAI | Agentic AI/Automation | Artificial intelligence | RPA | Intelligent document processing | Smart analytics | Machine learning | Blockchain | IoT | Cloud | Mobility

Operating models, methodologies, and platforms

BPaaS, SaaS, SaS and IaaS | Outsourcing | Shared services | GBS | COEs | Design thinking

HFS value chain definition: A value chain is a set of business units that carry out value-creating activities to design, produce, market, deliver, and support a company's product or service. In this usage, we refer to the range of primary processes and support services that providers offer to their clients.

Sources of data

This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of participating organizations covered in our study. The sources are as follows:

Briefings and information gathering

HFS conducted detailed **briefings** with each vendor's legacy app and data modernization leadership from service providers.

Each participant submitted a specific set of **supporting information** aligned to the assessment methodology.

Reference checks

We conducted reference checks with **40 active clients and 36 active partners** of the study participants via surveys and interviews.

HFS Pulse

Each year, HFS fields multiple demand-side surveys with detailed vendor questions.

For this study, we leveraged our fresh-from-the-field HFS Pulse study data featuring **605 enterprise leaders.**

Other data sources

Public information such as news releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Major themes covered in this study

The future of customer services in GenAI and Agentic era

GenAI is becoming the default interaction layer across voice, chat, messaging, and in-app journeys, reshaping how experiences are designed, delivered, and measured

Evolving CX value chain starting from contact center to journey orchestration

CX is shifting from reactive support to end-to-end journey ownership, including journey analytics, continuous optimization, and integrated service-to-revenue motions

Service provider differentiation shifts to AI-native CX at scale

Providers are increasingly judged on their ability to deliver AI-native CX outcomes, not just staffing and service-level agreements (SLAs). Differentiation comes from reusable IP, domain playbooks, prebuilt agents, and measurable value delivery.

Rise of agentic workflows and autonomous CX

Next frontier is agentic automation; systems that can plan, execute, and verify tasks across customer relationship management (CRM) with human oversight, reducing rework, cycle time, and customer effort.

Ecosystems interdependency

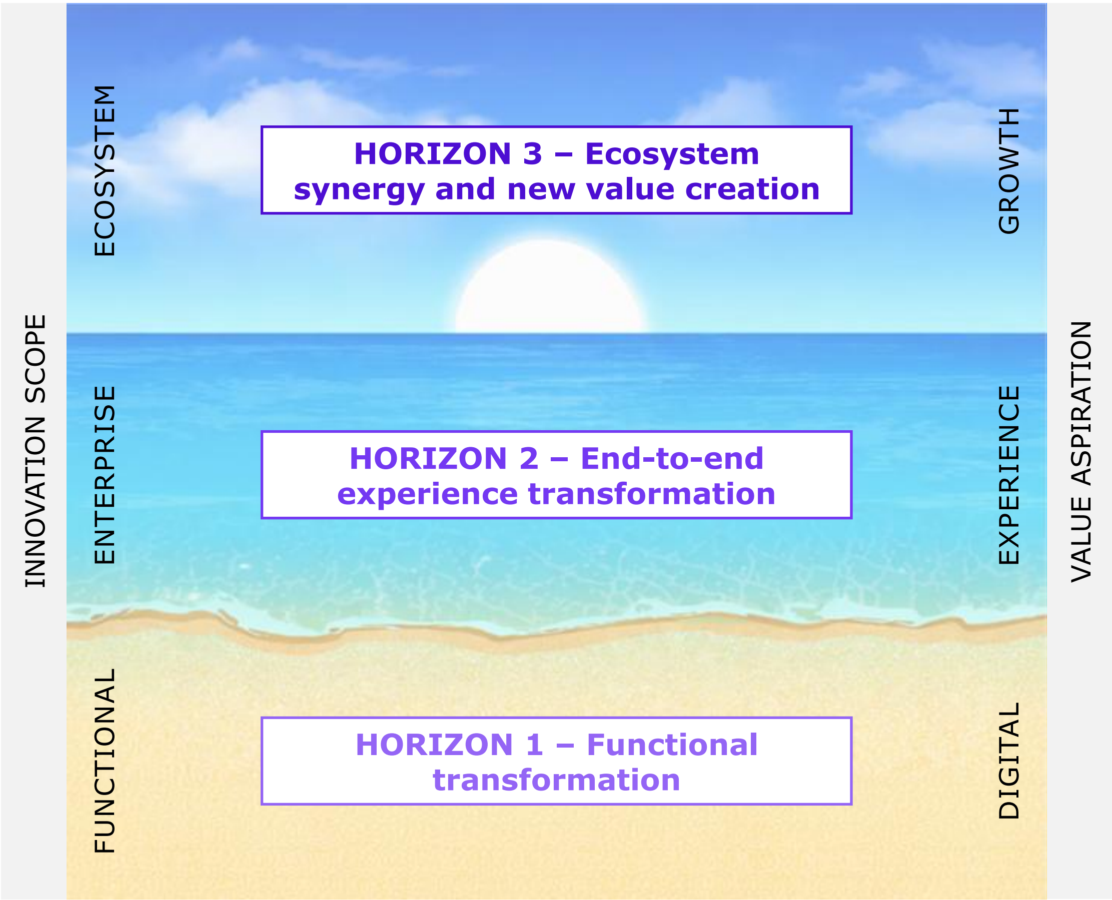
CX outcomes depend on tight integration across the partner ecosystems. Providers must orchestrate the stack of contact center as a service (CCaaS), CRM, and other platforms, and not just implement parts of it

Enterprise workforce readiness

CX success depends on trust-by-design and workforce transformation (new roles, skills, incentives, QA modernization).

HFS OneOffice, the re-imagined operating model for Services-as-Software™

HFS Horizons: Customer Experience Services, 2026



SYNERGY is Horizon 3

Horizon 3 service providers demonstrate:

- Horizon 2 +
- Ability to drive a **OneEcosystem synergy** via collaboration to create completely **new sources of value**
- Offer **Services-as-Software** and platforms that operate independently of headcount
- Strategy and execution capabilities at scale
- Well-rounded capabilities across all value creation levers: talent, domain, technology, data, and change
- Drive co-creation with clients as ecosystem partners
- Referenceable and satisfied clients driving new business models with partnerships

EXPERIENCE is Horizon 2

Horizon 2 service providers demonstrate:

- Horizon 1 +
- Ability to drive a **OneOffice model of end-to-end organizational alignment** across the front, middle, and back offices to deliver **unmatched stakeholder experiences**
- Support clients aligning customer and employee experiences
- Global capabilities with strong consulting skills
- Enable enterprise transformation as an ongoing multi-year managed service
- Proven and leading-edge proprietary tools, assets, and frameworks
- Referenceable and satisfied clients for their ability to innovate

OPTIMIZATION OUTCOMES is Horizon 1

Horizon 1 service providers demonstrate:

- Ability to drive **functional optimization outcomes**
- Enable cost reduction, speed, and efficiency
- Strong implementation partners
- Offshore-focused with strong technical skills
- Robust fundamentals of transformation services
- Referenceable and satisfied clients for their ability to execute

Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, 2026

Horizons assessment methodology

This research will evaluate the capabilities of service providers across a range of dimensions to understand the ***why, what, how, and so what*** of their CX offerings.

Distinguishing Supplier characteristics

Assessment dimension	Assessment sub-dimension	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The why? **(25%)**	Strategy for the customer experience market and vision for the future of the industry Customer experience offerings aligned to top problem statements for the sector Differentiators – why clients want to work with you	• Ability to drive **functional optimization outcomes** through cost reduction, speed, and efficiency	• Horizon 1 + Enablement of the "OneOffice" model of **end-to-end organizational alignment** across the front, middle, and back offices to drive **unmatched stakeholder experience** (EX, PX, CX)	• Horizon 2 + Ability to drive **"OneEcosystem" synergy** via collaboration across multiple organizations with common objectives around driving completely **new sources of value**
Execution and innovation capabilities: The what? **(25%)**	Breadth and depth of services across the customer experience value chain and associated delivery capabilities Strength of talent – hiring, training, and ongoing development. Approach to and strength of ecosystem partners Technology innovation	• Functional domain expertise for segments of the CX value chain • Talent focused on key process domains or tech • Focused partnerships and strong PX • Limited IP	• Comprehensive coverage across the Customer Experience value chain • Strong industry-specific talent pool across IT and operations domains • Range of industry-specific partnerships and strong PX • Strong IP	• Comprehensive coverage across the Customer Experience value chain and beyond • Strong talent pool across Consulting, IT and operations domains • Comprehensive industry-specific partnerships with strong PX • Strong industry-specific IP + JVs
Go-to-market strategy: The how? **(25%)**	What are you actually selling ? Nature of investments in your customer experience business (M&A, non-M&A, R&D) Co-innovation and collaboration approaches with customers and partners including creative commercial models Customer targeting approach	• Investments aligned to functional optimization outcomes • Optimization and point solutions • Target-focused personas and lines of business (LOBs), major tier 2 and 3 firms, geo-specific	• Horizon 1 + investments aligned to enterprise experience • Optimization and top-down transformation • Target range of personas and LOBs, tiers 1 and 2, broad geo coverage	• Investments aligned to Horizons 1 and 2 plus ecosystem enablement • Horizons 1 and 2 plus co-creation with customers and partners • Horizons 1 and 2 plus new value creation • C-suite coverage across LOBs and geos for tiers 1 and 2
Market impact: The so what? **(25%)**	Scale of the customer experience business – revenue, clients, and headcount Growth of the customer experience business – revenue, clients, and headcount Proven outcomes showcasing the nature of value delivered to customer experience Voice of the customer	• Proven scale and growth driven by functional optimization focus • Top marks as an optimization partner across key customer experience functions (CX)	• Proven scale and growth driven by Horizon 1 + stakeholder experience • Top marks as an enterprise transformation partner emphasizing stakeholder experience (CX+EX)	• Proven scale and growth driven by H2 plus ecosystem synergy • Top marks as a global growth partner driving new business models (CX+EX+PX)

2 Market dynamics

Top CX challenges that enterprises face in 2026 (1/2)

01 **Rising and relentless customer expectations**
Customers now expect services that are instant, proactive, and personal across every channel. The bar keeps climbing as AI reshapes daily life, and the patience for friction keeps shrinking.

02 **Losing direct control of the customer experience**
Customers increasingly reach brands through AI assistants and AI-mediated search rather than direct channels. As AI becomes the interface, the enterprise no longer owns the interaction and risks losing direct control of the experience, its voice, and the customer relationship.

03 **Fragmentation across data, channels, and the organization**
Enterprises are trying to deliver connected experiences on disconnected foundations. Siloed data, broken handoffs, and the divide between digital and contact centers mean context is lost at every transition. Fragmentation stalls AI, as agents without context cannot resolve customer intent.

04 **Scaling AI from isolated wins into an orchestrated operation**
Most enterprises can make a single AI use case work. Far fewer can turn scattered bots and tools into AI that runs as one system across the customer journey. The hard part is rarely technology and more often operational readiness.

05 **Deciding what to keep human and what to automate**
Not every interaction should be automated and getting the line wrong cuts both ways. Automating a high-emotion moment erodes trust and leaves routine volume to people, leading to lost value. But what stays human today may not tomorrow.

Top CX challenges that enterprises face in 2026 (2/2)

06

Trust, governance, and risk on customer-facing AI

Putting AI in front of customers raises the stakes on governance, from explainability and audit trails to fraud risks and accountability when agents fail. For most, governance trails ambition, keeping AI confined to lower-stakes work.

07

Workforce readiness and the changing role of people

As AI absorbs routine work, the frontline job shifts from handling volume to handling judgment. The shift demands new roles, skills, and quality measures, which enterprises most underestimate. The technology is ready before the workforce.

08

Fragmented buying decisions and unclear ownership

CX now spans marketing, sales, services, and IT, and the buying decision that once sat in one office is now divided across the C-suite. As the responsibility is split, no one owns the outcome, so decisions stall and accountability blurs.

09

The ROI question that remains unanswered

Proving CX value has always been hard, and heavy AI spend elevates the challenge. Few enterprises can tie that spend to revenue, retention, or cost-to-serve, because efficiency is easy to prove, but growth is not.

Our key learnings while conducting this study

01 **The vision has settled, but outcomes remain aspirational**

Providers agree that CX is going toward agentic, AI-native, outcome-led delivery. Turning that shared vision into delivered outcomes is the part that the market is yet to prove.

02 **Agentic AI now leads the roadmap and the budget**

The shift from assisted to autonomous is no longer debated; it is assumed. Seventy-four percent of clients place GenAI and agentic AI among their top three technology investments, with people increasingly reframed as orchestrators rather than handlers.

03 **As capability commoditizes, differentiation moves to structure**

The tools that once set providers apart (agent assist, automated quality, conversational AI) are now standard and often built on similar platforms. Real differentiation has shifted to proprietary data, owned IP, domain depth, the operating model, and outcomes.

04 **EX and CX rise together**

Nearly every provider treats EX as part of the CX, and several redesign them as a single connected operating model. Some track employee NPS alongside customer NPS and flag attrition as a direct risk to the customer experience.

05 **Governance is an obligation, not an advantage**

Governance appears across every provider's CX services, but it shows up because it has to, not because it is the story they want to tell. Only a few turn it into a genuine differentiator.

06 **Everyone agrees on outcome-based pricing, but almost no one uses it**

Both providers and clients say they want outcome-based pricing. Seventy-six percent of clients are open to outcome or gainshare models, yet only 5% of contracts use them. The friction is in commercial delivery.

07 **CX is sold as growth but delivered as efficiency**

Providers increasingly position CX as a driver of revenue and customer lifetime value, but the outcomes clients report receiving remain efficiency and containment. Most providers are built to cut costs but struggle to create value.

08 **CX enters the Services-as-Software era**

CX is widening from contact center operations to end-to-end customer journeys, creative, and commerce and is increasingly bought alongside IT services. As CX and IT services converge, delivery is shifting from staffing to software.

Partners grade the promise while clients grade the delivery

Please rate the provider's expertise based on the following parameters
(Scale of 1 to 10, where 1 is poor and 10 is excellent; average rating)

Reference quotes

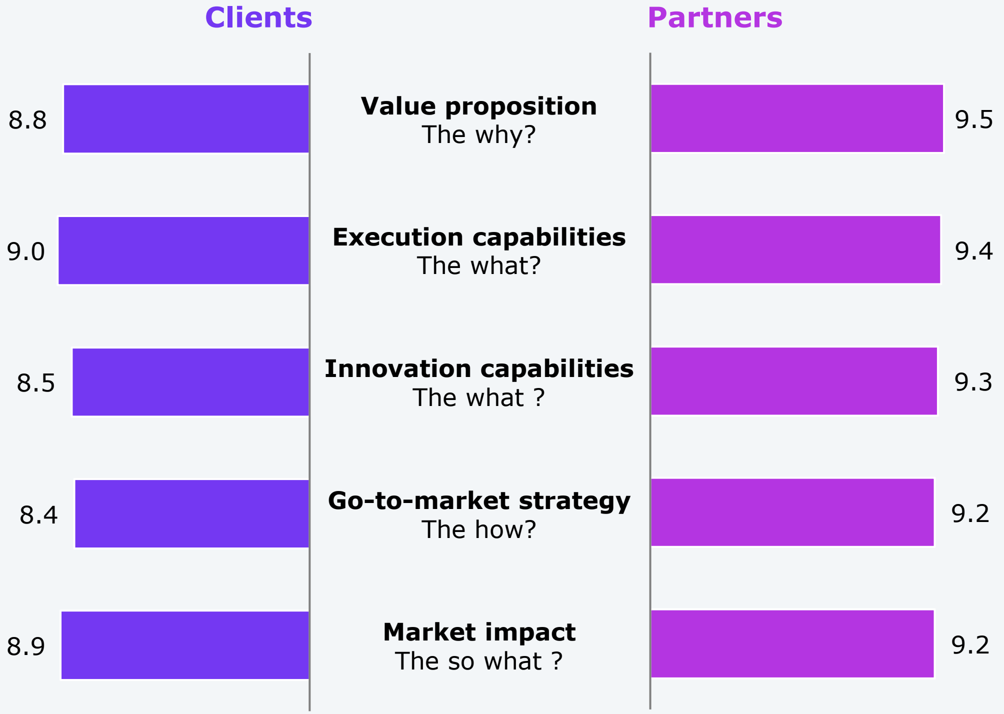
"Consistently thinking about the future state of the business... the primary lens is the need of the business."

"They have deep domain expertise, their teams are high-performing, and they cater to our needs as a client to promote a true collaboration."

"Strong innovation capabilities, but you still have to be in the driving seat."

"A brave and ambitious approach that potentially cannibalizes their legacy revenue model."

"We have a great partnership, and they continue to bring new ideas and co-innovation models with tangible benefits."



Reference quotes

"They see the future state of CX and provide a viable roadmap to achieve it."

"They launched a series of projects in record time and at very competitive prices."

"An IP-first model... deploying agentic AI faster than traditional methods."

"Their commercial models are flexible and aligned to enterprise needs, and they are increasingly engaging in co-innovation efforts as they expand their consulting capabilities."

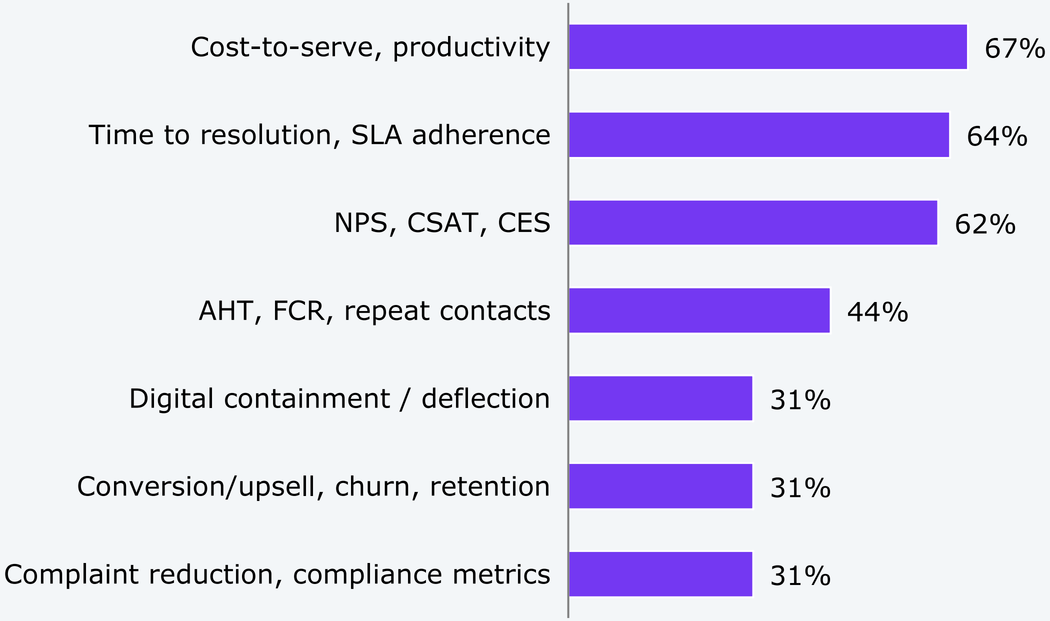
"Repositioning as a transformation partner focused on outcomes rather than traditional service delivery."

Sample size: 40 enterprise CX buyers and 36 partners in the CX ecosystem; quotes lightly redacted
Source: HFS Research, August 2026

Providers deliver an operational engine, not a growth engine

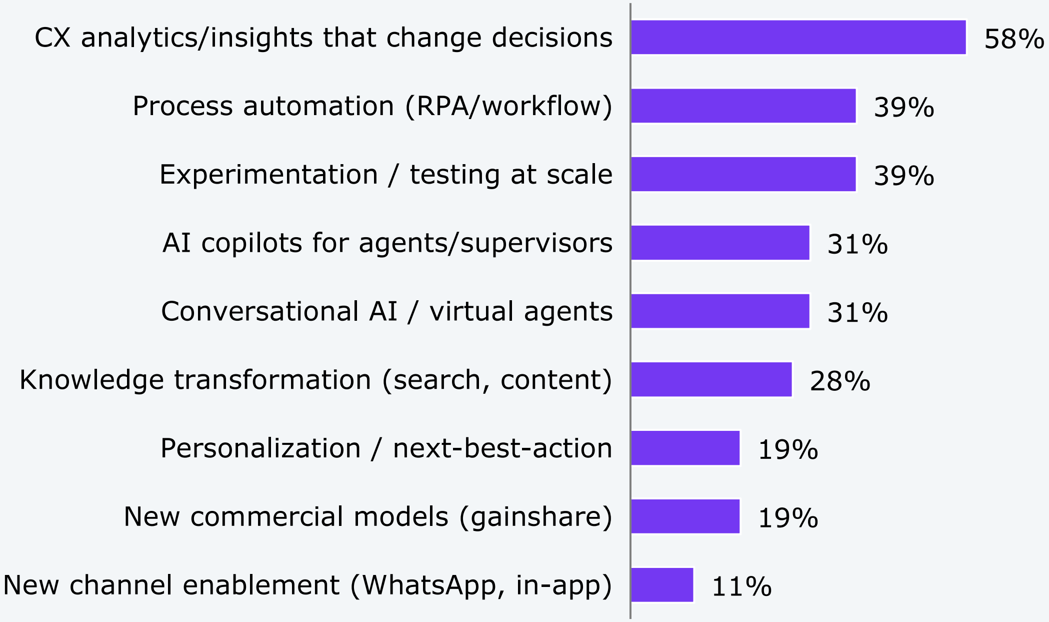
Which outcomes has your service provider measurably improved in the last 12 months?
(Please select all that apply)

The outcomes that moved



What innovation do you actually receive today?
(Please select all that apply)

The innovation that arrived



Sample size: 40 enterprise CX buyers
Source: HFS Research, August 2026

Kudos and critiques from clients’ own words

What are the top three strengths of your CX provider?

The kudos: What clients praise

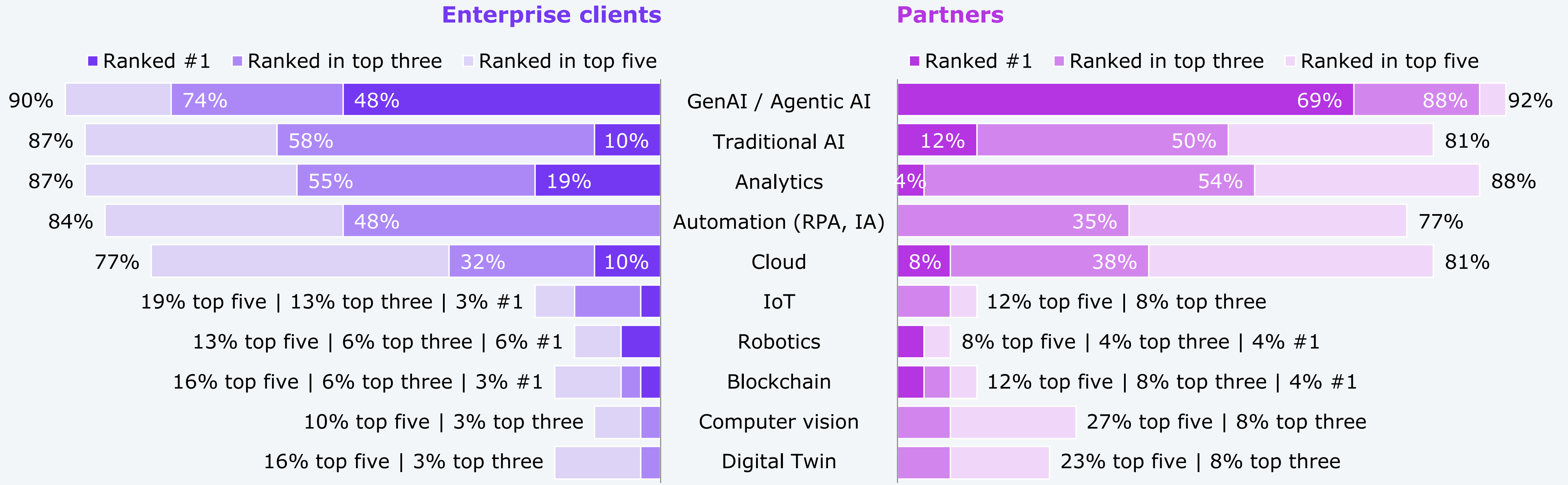
What are the top three improvement areas of your CX provider?

The critiques: What clients want fixed

Sample size: 40 enterprise CX buyers
Source: HFS Research, August 2026

Both sides bet the CX budget on GenAI and Agentic AI

Please rank the following technologies based on where your organization is directing the most technology investment today
(1 = greatest share of budget)



Sample size: 40 enterprise CX buyers and 36 partners in the CX ecosystem
Source: HFS Research, July 2026

CX buyers want outcome-based pricing, yet their contracts still pay for effort

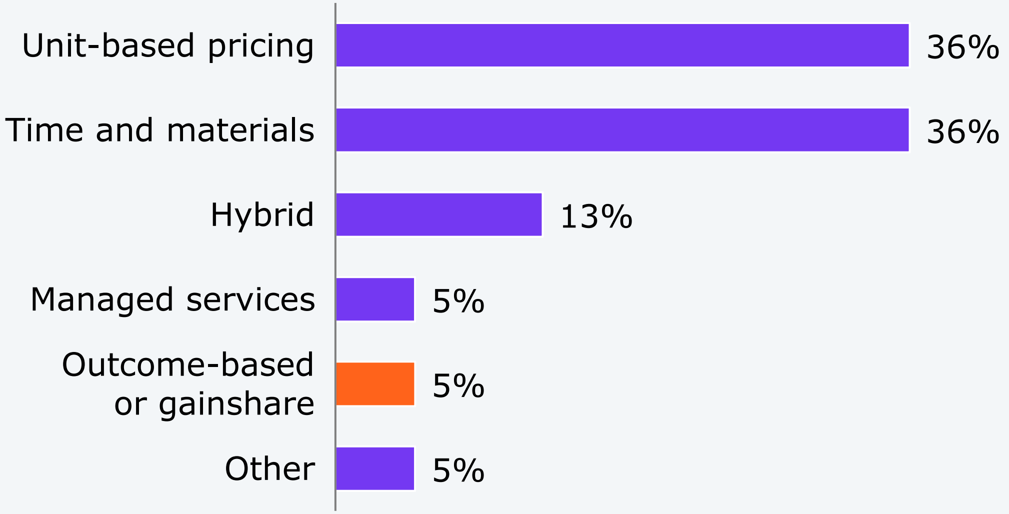
5%
contracted on outcome-based pricing today

~15x appetite gap

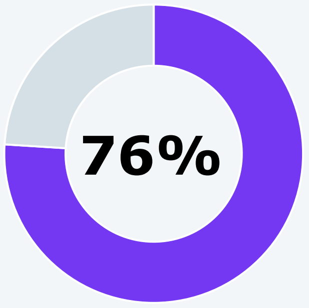
76%
are open to outcome-based or gainshare

The contract today

Which commercial or pricing model best describes your primary contract today?



The appetite



Enterprise CX buyers are open to outcome-based or gainshare pricing models?

29 of 38
clients are open to outcome-based or gainshare pricing models

"The key is having transparency of measurement and a clear way to evaluate whether the agreed-upon outcomes are being achieved."

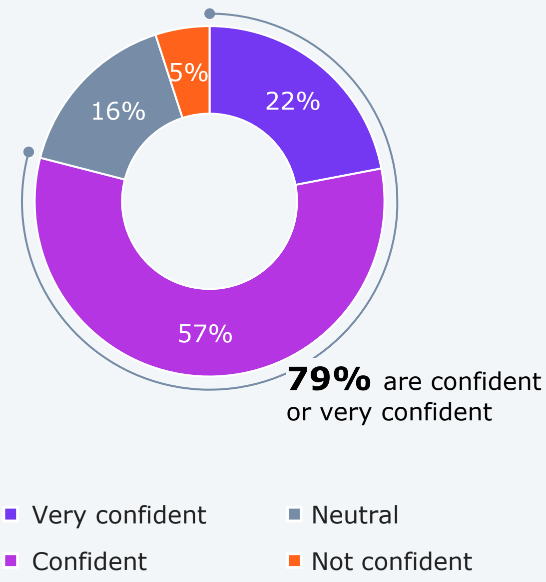
— Enterprise client reference, open to outcome-based models

Sample size: 40 enterprise CX buyers
Source: HFS Research, August 2026

Clients trust AI to own CX outcomes, and partners are even more bullish

How confident are you in allowing AI-driven capabilities to be the primary owners of key CX outcomes?

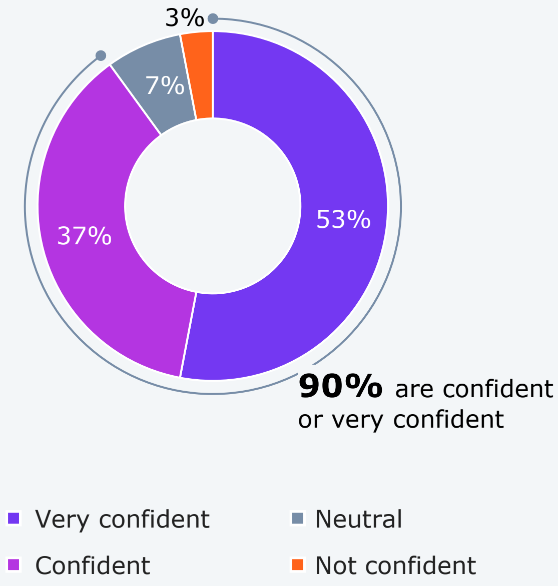
Enterprise clients



"It is a matter of time. There are already early examples of AI taking over completely, and the impact on CX outcomes has been positive. The error rate for AI is much smaller than the human error rate."
— Client reference, very confident

"I use AI across every channel and for agent assist, but there will always be a human in the loop. My strategy on AI is resolution, not containment."
— Client reference, not confident

Partners



"We are already seeing AI improving CX services, and the future will hold more AI-led products handling the majority of CX activities with the human in the loop."
— Partner reference, very confident

"AI can be the automation engine, but it is dependent on the business logic that goes into the platforms and technology that will enable the desired outcomes."
— Partner reference, not confident

Sample size: 40 enterprise CX buyers and 36 partners in the CX ecosystem; quotes lightly redacted
Source: HFS Research, August 2026

The customer experience services ecosystem

Hyperscalers
aws, Google Cloud, Microsoft

Foundation and frontier AI
ANTHROPIC, Meta, MISTRAL AI_, OpenAI

Data, analytics and decision intelligence
celonis, databricks, snowflake

Hardware and infrastructure
DELL, Hewlett Packard Enterprise, Lenovo, NUTANIX, NVIDIA

Automation
AUTOMATION ANYWHERE, Tricentis, UiPath

Contact center and customer service platforms
Amazon Connect, AVAYA, CISCO, Five9, freshworks, GENESYS, Gladly, NICE, talkdesk, twilio, Zendesk

CRM and enterprise applications
Microsoft Dynamics 365, ORACLE, PEGA, salesforce, SAP, servicenow, workday

Commerce, content and CMS
Acquia, commercetools, contentful, opentext, Optimizely, shopify, SITECORE, VTEX

Martech, VoC and customer engagement
Adobe, braze, Medallia, newgen, qualtrics XM, sprinklr

Conversational and agentic AI
audiocodes, COGNIGY, ElevenLabs, kore.ai, krisp, LIVEPERSON, Parloa, sanas, SIERRA, Voicing AI, yellow.ai

Agent assist and workforce AI
amplifAI, centrical, CRESTA, KNOWMAX, Leena AI, OBSERVE.AI, UNIPHORE, VERINT, zenarate

Revenue, sales and customer success
Anaplan, GONG, reef.ai, regie.ai, Varicent, Xactly

Rising stars
CRESCENDO, dataorb, Decagon, Ema, levelai, Maven AGI, netomi, REGAL, yuma.ai

Note: This is a representative list, not exhaustive; partners are grouped by primary function and are listed in alphabetical order
Source: HFS Research, August 2026

3 Horizons results: Customer Experience Services, 2026

HFS Horizons: Summary of providers assessed in this report

Providers (alphabetical order)	HFS point of view
Accenture	Full-journey CX reinvention, from creative to operations
Amdocs	Agentic CX engineered as one accountable delivery system
Atain	Travel-native CX expertise powering AI-led assured outcomes
Capgemini	Domain-deep, AI-native intelligent operations for CX transformation
Coforge	Domain-led agentic CX engineering for regulated ecosystems
Cognizant	Orchestrating AI-native CX across marketing, care, and commerce
Concentrix	AI-augmented CXM platform with delivery ownership, navigating the BPO-to-partner transition
Deloitte	Consulting-led, AI-first CX transformation powered by proprietary agentic IP
EXL	AI-native CX transformation grounded in data, domain, and outcome-aligned delivery
EY	Consulting-led CX transformation sold as C-suite growth
Firstsource	AI-native intelligence rooted in 25 years of CX operations
Genpact	Autonomous customer resolution, built vertical by vertical
HCLTech	Industrializing AI-first contact center modernization for the agentic CX era
HGS	Outcome-backed, AI-native CX transformation built on operational depth
ibex	Operations-led CX scaling AI on a human foundation
IBM	AI-led CX transformation backed by client zero credibility
Infosys	AI-amplified CX transformation across the full value chain

Providers (alphabetical order)	HFS point of view
IntouchCX	Operations-led AI adoption with a turnkey advisory-to-delivery model
iQor	Insights-led orchestration of human and agentic CX delivery
Konecta	Labor-scale CX to hybrid human + AI orchestration
KPMG	Consulting-led Total Experience transformation anchored in AI trust
LTM	AI-native creative and commerce agency redefining enterprise CX
Movate	Engineering-rooted applied AI orchestration for compounding CX outcomes
Mphasis	Engineering-led CX modernization governed for the regulated enterprise
Publicis Sapient	Growth-led CX transformation fusing media and identity assets with agentic engineering
Sutherland	Labs-driven innovation and proprietary AI powering outcome-backed CX transformation
TCS	CX transformation through insight, orchestration, and enterprise technology scale
Tech Mahindra	Agentic AI with emerging outcome economics and deep CX operations
TP	Orchestrating human and agentic CX at global scale
TELUS Digital	Proprietary AI products along with embedded engineering muscle elevating the CX services
Transcom	Advisory-led, AI-native CX with proprietary workforce technology
TTEC	AI innovation with real CX operations at scale
Wipro	Consulting-led, AI-embedded CX anchored on proprietary agentic platforms

Note: All service providers are listed alphabetically

Thirty-three service providers were evaluated in this report

accenture, amdocs, ATAIN, Capgemini, Coforge, cognizant

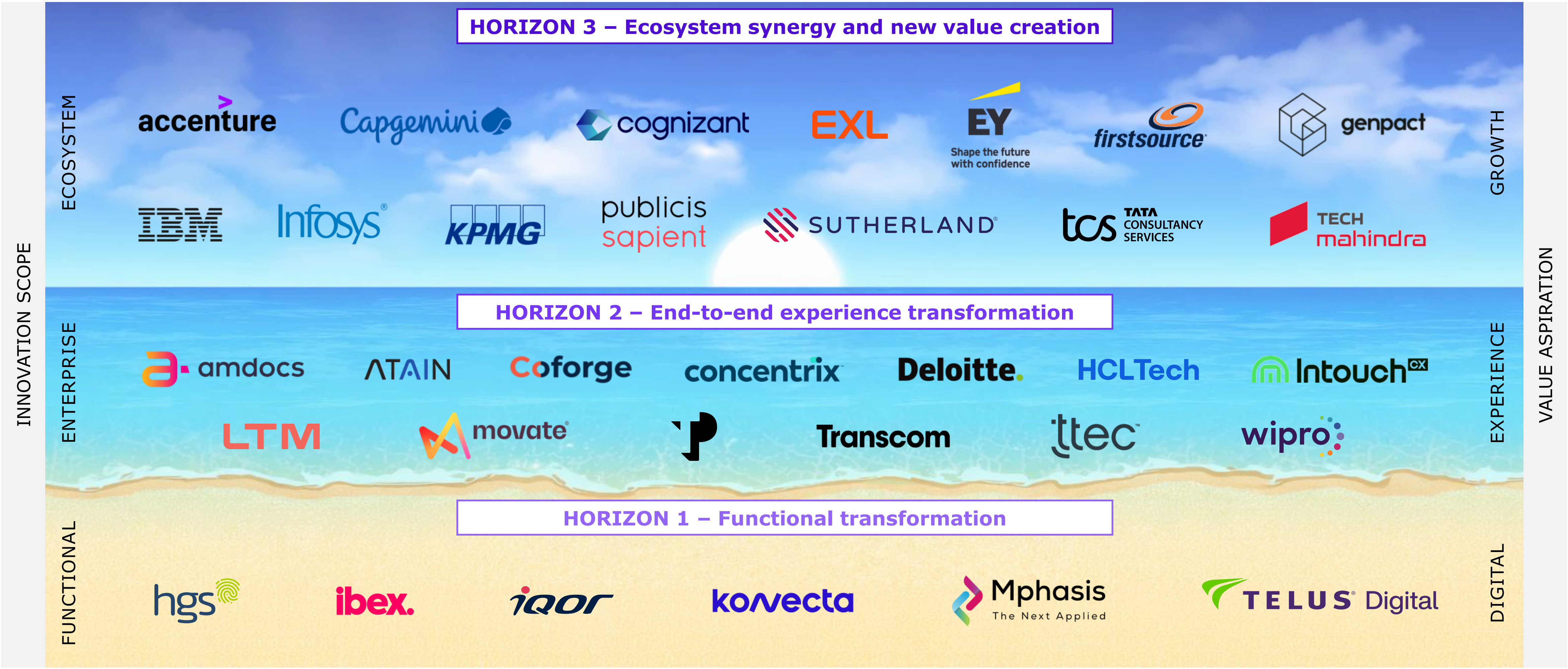
concentrix, Deloitte., EXL, EY Shape the future with confidence, firstsource, genpact, HCLTech

hgs, ibex., IBM, Infosys, Intouch CX, iQor, konecta

KPMG, LTM, movate, Mphasis The Next Applied, publicis sapient, SUTHERLAND

tcs TATA CONSULTANCY SERVICES, TECH mahindra, TP, TELUS Digital, Transcom, ttec, wipro

HFS Horizons: Customer Experience Services, 2026



Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, 2026

4 Capgemini profile: Customer Experience Services, 2026

Capgemini: Domain-deep, AI-native intelligent operations for CX transformation

Strengths	Development opportunities
• **Capgemini's Intelligent Business Operations (IBO) business unit, combining WNS with Capgemini Business Services:** Capgemini combines WNS' deep verticalized CX operations and transformation delivery expertise with its own strengths in CCaaS, Salesforce, Genesys, Snowflake, hyperscaler relationships, and agentic engineering capabilities. • **Combination of operational domain depth and native-stack ownership:** WNS knows CX and Capgemini knows tech, which gives the combined entity a stronger right to play in complex transformation programs. Capgemini's ability to combine WNS' industry-specific process knowledge with Capgemini's system integrator (SI) muscle across Salesforce, Genesys, Snowflake, cloud, and hyperscaler ecosystems is another differentiator. • **Technology innovation:** EXPiRiUS organizes transformation across customer journey intelligence, engagement, agent experience, and analytics and automation. RAISE adds the trust layer needed to build, govern, monitor, and scale AI agents responsibly. • **Outcomes:** For a global consumer goods company, Capgemini consolidated delivery into a single strategic partner and stood up a touchless model on Salesforce, cutting the total operations cost by 50% and voice demand by roughly 30% against a committed 63% productivity gain. For a Big 6 UK energy provider, a multi-LOB transformation spanning service, collections, and back office delivered a 3x reduction in cost of operations and a 2 to 2.5x improvement in NPS. • **Client and partner reference kudos:** Clients commend its strong delivery, breadth of service, and the quality of relationships and people.	• **What we'd like to see more of:** Should sharpen the market-facing narrative on how its combined WNS and Capgemini proposition delivers native-stack modernization, agentic operations, unified journey orchestration, and revenue growth from service • **Next steps:** Productizing its IP's into Services-as-Software offerings with consumption or outcome-based pricing would decouple revenue from headcount and make risk-sharing more visible to enterprise buyers • **Client and partner reference critiques:** Clients want broader service coverage, clearer demonstration of value for investment, deeper integration of strategy into the core business, and proactive communication.

Key offerings	Mergers and acquisitions (2023–2026)
CX strategy and experience design, AI strategy and governance, customer journey orchestration, sales and revenue transformation, marketing operations transformation, service transformation, retention and loyalty, smart collections, multilingual customer engagement, customer data and interaction insights, agent experience transformation, quality automation, technology ecosystem and platform integration, AI-powered orchestration and automation, managed services and transformation delivery	• **WNS (2025):** To establish a market-leading position in agentic AI-powered intelligent operations • **Cloud4C (2025):** Hybrid cloud, sovereign cloud, managed cloud services, AI operations • **Syniti (2024):** Enterprise data management, data migration, data quality, SAP transformation

Partnerships	Key clients	Global operations and resources	Flagship internal IP
Google Cloud, Microsoft, OpenAI, Salesforce, Genesys, Snowflake, AWS, NiCE, ServiceNow, Zendesk	**Number of customer experience clients:** 150+ **Key clients** • Leading global QSR Brand • Major US pharma retailer • Global hyperscaler lead • Top 5 US bank • Major UK energy company • Leading American airline	**Customer experience headcount:** 30,000 **Number of delivery and innovation centers:** 79 Delivery footprint across North America, Central and Latin America, EMEA, Asia Pacific **Locations of centers by major geos:** India, Philippines, South Africa, China, US, UK, Poland, Romania, Malaysia, Turkey, Costa Rica, Mexico, Guatemala, Brazil, Egypt, Sri Lanka	• **EXPiRiUS:** Digital and AI transformation framework for CX • **TranslateEX:** Real-time AI translation and accent neutralization solution • **TravelBuddy:** Agentic AI solution for end-to-end corporate travel management • **SmartCollections:** AI-powered collections platform • **EngageEX:** CX engagement and interaction analytics solution • **JourneyEX:** Customer journey mapping and intelligence capability • **ConverseEX:** Conversational AI capability for multilingual virtual agents • **RAISE:** Responsible AI for Sustainable Enterprise • **KnowRA+:** Agent Decision Support Platform • **Helix:** AI-native marketing operating model

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Melissa Fersht is Research Leader, Customer Engagement, Retail, and Travel Strategies at HFS Research. Melissa leads HFS' research initiatives for digital front office services, including customer engagement operations, digital marketing, cognitive agents and CX design and consulting, focusing on the trends and change agents that are driving customer experience across the enterprise.

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Krupa KS is a senior analyst for HFS Research. She supports the firm's research initiatives across several key categories: customer experience, retail and CPG, supply chain, and travel and hospitality. Her responsibilities include IT and business process outsourcing contracts data collection, and analysis of various service lines.

She has over four years of experience in business research and analysis in Excellence4U Research Services and Futurecorp Consulting. She was the part of the market research team, where her responsibilities were performing secondary research for company profiling, industry analysis and competitive analysis. At Excellence4U, she worked with technology mapping team that helped to know the clients, the products that were used which would help them to understand the need of customers.

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Jason Dann is a Research Analyst at HFS Research and is based in Boston, MA. He focuses on the evolving landscape of sports technology and the broader services ecosystem that supports enterprise transformation. His work spans multiple industries, with a particular emphasis on how service providers enable organizations to meet their strategic objectives.

Jason leads HFS's research in the Sports & Entertainment space, drawing on his background as a former college athlete and his deep interest in the intersection of sports and technology. He is especially focused on how innovation is enhancing operational performance and delivering superior experiences for both sports organizations and their fans.

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