

Who puts AI to work, by the numbers.

369 firms in **41 countries** are paid mainly to put AI to work inside other companies.

Scayl mapped them across 11 layers of the market. Here are six findings: how the market splits, where the firms are based, who funds them and who is buying them, and what to ask each kind of firm before you hire one.

Snapshot **v3 snapshot, 20 Oct 2026** Firms **369** Funding rounds **172** Deals **51**
Work in progress

01 Four layers hold 82% of the market. The other seven are small enough to compare in an afternoon.	02 43% are based in the US. The rest come from 40 other countries.	03 Venture money backs software, not services. \$27.1bn disclosed, and very little of it in the biggest layers.
04 Funding is speeding up. 58 rounds in 2026 so far, against 35 in all of 2025.	05 The buyers have arrived. About 1 in 5 AI-native implementation firms is already owned by someone else.	06 Four ways to hire, four sets of questions. What each route is good for, and what to ask before you sign.

Four layers hold 82% of the market.

303 of the 369 firms sit in just four layers: AI-native implementation firms, Big consultancies & integrators, Regional & industry specialists and Data & integration partners. The other 7 layers have 12 firms or fewer each. The smallest, Software that comes with engineers, has 7.

01	AI-native implementation firms		90
02	Big consultancies & integrators		86
03	Regional & industry specialists		76
04	Data & integration partners		51
05	Training & change management		12
06	Managed IT providers adding AI		11
07	Cloud & software platform programmes		10
08	Custom software built with AI		10
09	AI labs' own deployment teams		8
10	Ready-made implementation software		8
11	Software that comes with engineers		7

FOR BUYERS

Most of the choice, and most of the noise, is in the four big layers: shortlist there by industry and country. In the small layers you can compare every firm in an afternoon.

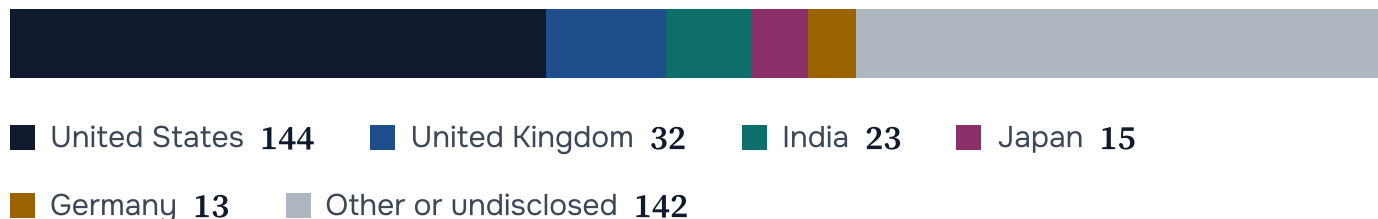
FOR THE FIRMS LISTED

Select your layer to see who you are listed beside.

Source: Scayl, AI Implementation Landscape 2026, v3 snapshot, 20 Oct 2026. Each firm is counted once, in its main layer.

43% are based in the US. The rest come from 40 other countries.

Of the 336 firms with a disclosed headquarters, **144** are American. United Kingdom (32), India (23), Japan (15) and Germany (13) follow.



31 Regional & industry specialists come from 31 countries, more than any other layer. Only 7 of the 76 are in the US.

[See the regional & industry specialists →](#)

FOR BUYERS

Outside the US, a local specialist is often the shortest route to a partner who knows your market, your language and your rules.

Source: Scayl, AI Implementation Landscape 2026. 33 firms have no disclosed headquarters and are left out of the country shares.

Venture money backs software, **not services.**

9 of 10

Custom software built with AI: firms with disclosed funding

1 of 86

Big consultancies & integrators. Most are listed or part of a larger group, and don't raise rounds.

4.5%

of the \$27.1bn disclosed went to the specialist teams that make up 68% of the firms

SHARE OF EACH LAYER'S FIRMS WITH DISCLOSED FUNDING

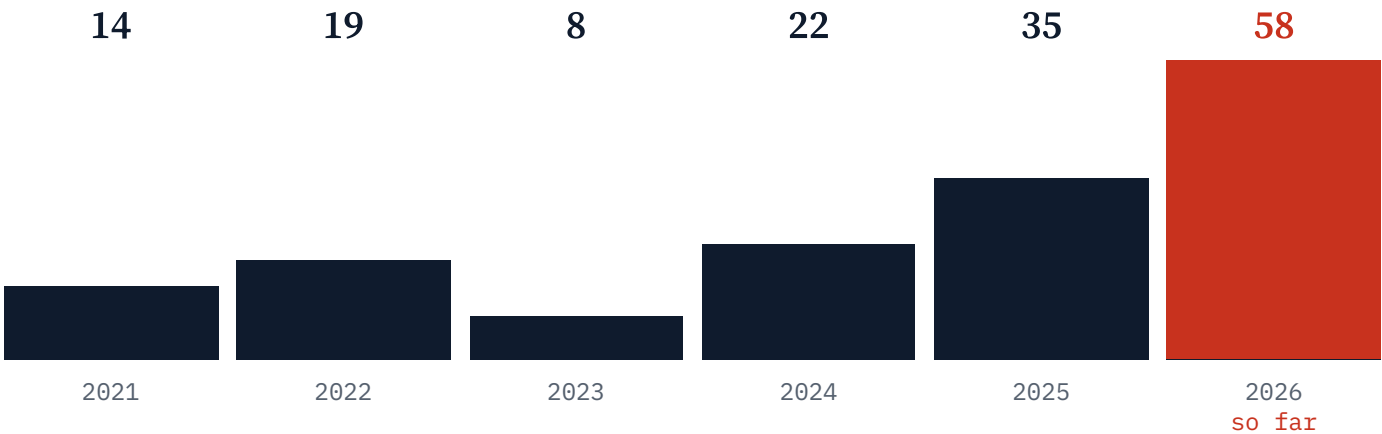
Custom software built with AI		90%	9 of 10
Ready-made implementation software		75%	6 of 8
Software that comes with engineers		71%	5 of 7
Managed IT providers adding AI		55%	6 of 11
Training & change management		25%	3 of 12
AI labs' own deployment teams		25%	2 of 8
AI-native implementation firms		22%	20 of 90
Data & integration partners		14%	7 of 51
Regional & industry specialists		13%	10 of 76
Big consultancies & integrators		1.2%	1 of 86
Cloud & software platform programmes		0%	0 of 10

FOR BUYERS

A funded firm has investors who expect it to grow fast: ask who will stay on your project as it does. A firm without funding lives on its clients: ask to speak to two of them.

Disclosed funding is the total a firm has made public. Firms inside larger groups and listed companies usually have none. \$27.1bn across 69 firms.

58 rounds in 2026 so far. There were 35 in all of 2025.



Funding rounds logged per year, to 20 Oct 2026

17 seed and pre-seed rounds
this year, up from 7 in 2025:
new firms keep arriving

48 rounds went to AI-native
implementation firms, more
than any other layer

+66% rounds so far this year,
against the whole of last
year

FOR BUYERS

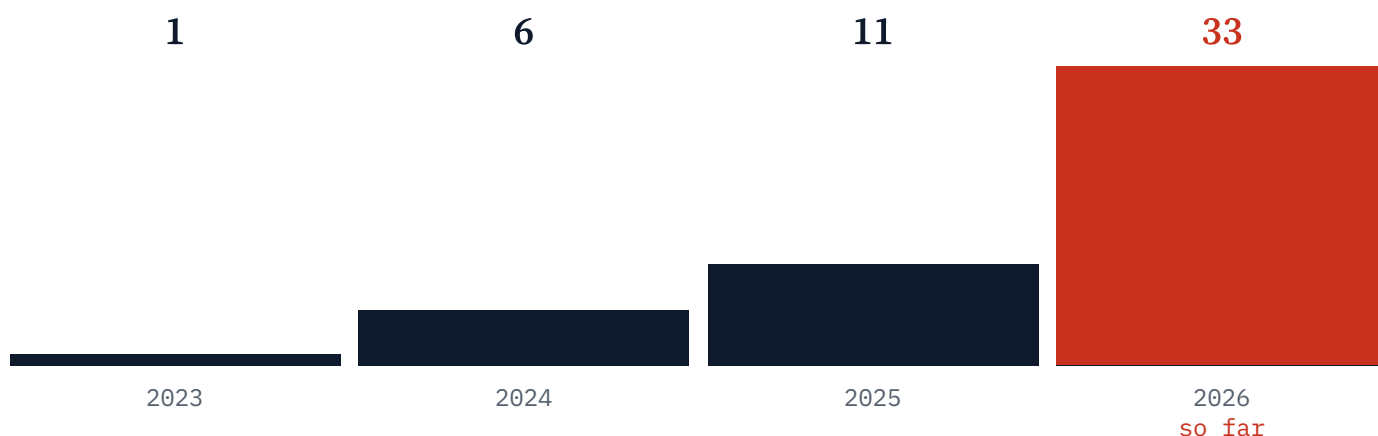
Many of the firms you meet will be young. Ask what happens to your project if they are bought or their money runs out.

Funding rounds logged in the Landscape, including buyouts and stakes recorded as rounds. Recent rounds are easier to find than old ones, so earlier years are undercounted.

The buyers have arrived.

About 1 in 5 AI-native implementation firms **has already been bought.**

18 of the 90 in the Landscape are now owned by someone else. [See who →](#)



M&A and investment deals per year, to 20 Oct 2026

33 deals in 2026 so far, more than in 2023–2025 combined (18)

7 by Accenture, the busiest buyer

19 made by Big consultancies & integrators listed in the Landscape

FOR BUYERS

If you hire a small AI-native firm, agree in the contract what happens to your project, your team and your data if it is acquired.

M&A and investment deals tracked in the Landscape, each with its sources in the firms' profiles. Acquired status as recorded for each firm.

Four ways to hire. Four sets of questions.

The Landscape groups the 11 layers by how a buyer would hire them. Here is who is in each route, and three questions to ask before you sign.

ROUTE 1 • 252 FIRMS

Hire a specialist team

Firms whose main business is building AI for clients.

AI-native implementation firms	90
Regional & industry specialists	76
Big consultancies & integrators	86

1.

Who exactly will work on our project, and what have they shipped that is like it?

2.

What will be running for real after 90 days, and how will we measure it?

3.

What do we own at the end: the code, the prompts, the data and the know-how to run it?

ROUTE 2 • 28 FIRMS

Use who you already work with

Start with the IT provider or platform you already pay for.

Managed IT providers adding AI	11
Cloud & software platform programmes	10
Software that comes with engineers	7

1.

What can you build on the systems we already have, inside our current contract?

2.

Which parts are your standard product, and which are custom work we pay for separately?

3.

If we move to another provider later, what comes with us?

ROUTE 3 • 81 FIRMS

Buy it as a product or fix the foundations

Cheaper, productised routes, and the data and people work that projects stall on.

Data & integration partners	51
Training & change management	12
Ready-made implementation software	8
Custom software built with AI	10

1.

Which of our data do you need, and who gets it clean enough to use?

2.

How will we know people are actually using it after launch?

3.

What does it cost from the second year on?

ROUTE 4 • 8 FIRMS

Go to the source

The AI labs' own teams: good context, open to only a few very large customers.

AI labs' own deployment teams	8
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1.

What size of commitment do you need before you will put a team on our project?

2.

Does working with you tie us to your models?

3.

Who runs the system once your engineers leave?

Routes and layers as grouped in the Landscape. The questions are Scayl's own, from how AI projects tend to stall.

One dataset, counted the same way throughout.

- ✓ The Landscape lists 369 firms whose main business is implementing AI inside client organisations. Each is counted once, in its main layer.
- ✓ Funding counts only where a firm has a disclosed total. Funding rounds and deals are as logged, with their sources, in each firm's profile.
- ✓ 33 firms have no disclosed headquarters and are left out of the country shares.
- ✓ Every figure on this page is computed from the Landscape data each time the page is built, so it always matches the Landscape.
- ✓ This is a snapshot and a work in progress: 124 entries are graded High confidence, 202 Medium and 43 Low.