ISG Provider Lens®

Aerospace and Defense Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | JANUARY 2026 | U.S. AND EUROPE (OVERALL ECOSYSTEM) AND GLOBAL (MID-SIZE AND SPECIALIST IT SERVICES PROVIDERS)

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Introduction

The aerospace and defense (A&D) industry in 2026 is poised for dynamic transformation, driven by advancements in technology, strategic shifts in defense priorities and evolving market demands. Key trends include:

- Adoption of lightweight, durable materials such as ceramic matrix composites and next-generation alloys to enhance fuel efficiency and performance.
- Additive manufacturing to move beyond prototyping to production, enabling complex, lightweight parts and faster assembly cycles.
- Digital tools such as model-based definitions and digital twins to accelerate design and testing processes, improving accuracy and shortening program timelines.

Commercial aerospace will focus on reviving production rates and managing persistent aircraft backlogs, emphasizing fleet reliability and sustainment. Supply chain resilience remains a priority, investing in reducing redundancy and enhancing supplier development and digital visibility to mitigate geopolitical and market volatility risks.
In 2026, A&D firms should integrate digital transformation strongly into manufacturing, supply chain and sustainment strategies while navigating tighter compliance and faster production requirements to capture growth opportunities in defense modernization and commercial aerospace recovery.

This study aims to understand the importance of A&D services and solutions while assessing providers' capabilities in this rapidly evolving space. The ongoing geopolitical tensions and emerging threats necessitate continuous investments in defense capabilities to ensure preparedness against potential conflicts. Countries invest heavily in modernizing their military forces, driving demand for innovative A&D solutions.

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What are **Essential Components** of **Aerospace and Defense?**

Design	Component Production	Subassembly	Final Assembly	Post-production Services
Conceptual Design	Materials Planning	Airframe/Structural Subsystems	Airframe Assembly	Marketing and Sales
Preliminary Design	Airframes/Structural Components	Onboard Avionics Subsystems	Onboard Avionics Integration	MRO
Detailed Design	Onboard Avionics Components	Propulsion Subsystems	Risk Management (Physical and Cyber)	Technical Training and Customer Support
Long-term Rozd Map	Propulsion Systems Components	Industry 4.0/IoT	EHS Management	Customer Relationship Management
	Production Planning and Engineering		Propulsion Systems Integration	

Sustainability and Efficiency	Innovation and Research
Storage Solutions	Research and Development
Sustainable Aviation Fuel	Collaboration with Research Institution
Offsetting	Emerging Technology Trend Assessments
Audits and Assessments	Intellectual Property Protection
Customer Education/Incentives	Industry Advocacy and Collaboration

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Blueprint* – Aerospace and Defense

Innovation (IP – Accelerators)

Partnerships (Tiers – Types)

Competency and Talent (Resources – Certifications)

Industry Focus and Alignment

Experience and Engagement

	Capabilities
Engineering, Design and Innovation	Engineering; Design; Innovation; Digital Twin; Automation; Digitalization; Model-based Systems Engineering
MRO and Aftermarket	Asset Health Management; MRO; Field Service Management; Condition-based Monitoring; Predictive Maintenance; Remote Monitoring; Analytics; CMMS; Compliance
Supply Chain Operations and Logistics Management	Order Management; Inventory; Warehousing; Delivery; Automation Services; Optimization and Resilience; Logistics; Demand Planning and Forecasting
Technology Transformation and Consulting	Digital Transformation; Sustainability; Account Management; Talent Management; Omni Channel Support; Automation; Enhanced Data Utilization; Cost Reduction

*Non-exhaustive

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This study focuses on key trends and provider capabilities that **enable digital transformation in the A&D industry**.

Simplified Illustration Source: ISG 2026

Overall Service Provider Ecosystem

- **Engineering, Design and Innovation**
- **Maintenance, Repair and Overhaul (MRO) and Aftermarket**
- **Supply Chain Operations and Logistics Management**
- **Technology Transformation and Consulting**

Midsize and Specialists IT Services Providers

- **Aerospace and Defense Services**

Definition

The ISG Provider Lens® Aerospace and Defense Services and Solutions 2026 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S. and Europe

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Large IT services providers are those with revenues exceeding $2 billion. They cater to multiple verticals, often spreading their resources across a broad range of industries. They primarily focus on serving large enterprises, often engaging in large transformation projects that require strong

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expertise, extensive resources and the ability to manage complex, enterprisewide innovations. Their robust industry experience, broad service capabilities and strategic partnerships with technology giants position them as key players in the global digital services landscape.

Midsize and specialist IT service providers

Midsize providers generate less than $2 billion in revenue and typically specialize in 3-4 verticals where they hold strong capabilities and significant revenue share. These providers adopt an agile and flexible approach, making them well-suited to serve both large enterprises and midmarket clients with tailored, industry-specific solutions. They also have strong inherent capabilities and heritage in digital engineering services. This combination of domain expertise, flexibility and a strong focus on innovation positions them as effective partners for businesses seeking to implement cutting-edge technologies with a faster, more agile approach.

Specialists are service providers uniquely positioned due to their niche capabilities that are either strongly embedded in specific verticals (for example, healthcare, financial services) or concentrated on specialized service areas such as AI and analytics. Typically, these providers focus intensely on 2-3 verticals where they hold a significant market share and expertise, allowing them to deliver highly tailored and innovative solutions. Specialists leverage their agility and flexibility to serve both large and midmarket enterprises. Their approach emphasizes solution-based problem-solving, making them highly responsive to the specific needs of their clients.

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Definition

Accelerated digital integration and advanced manufacturing techniques mark A&D engineering, design and innovation services in 2026. The widespread adoption of model-based definitions and digital twins is transforming design and testing processes, enabling faster, more accurate development cycles. Hybrid manufacturing approaches, combining additive manufacturing with precision machining, are increasingly used to meet stringent performance and certification requirements.

Rising defense budgets and compliance and sustainability regulatory demands propel innovation, driving investment in lightweight materials, eco-friendly propulsion and AI-enabled autonomous systems. Enhanced digital threads link the entire product lifecycle, fostering collaboration and reducing time-to-market. Cybersecurity and immersive technologies such as augmented reality are becoming integral to design, training and operational readiness, supporting rapid deployment and mission-critical capabilities.

Eligibility Criteria

1. Demonstrate experience in **offering engineering, design and innovation services** and solutions for OEM clients in the A&D industry
2. Showcase **successful engineering, design and innovation-related engagements** with at least three A&D companies
3. Have **at least three** of the following in the areas of engineering, design and innovation
   - Experience in **avionics/ aviation-specific projects**
   - Proven **deployment of IoT** in aerospace systems
   - **Compliance with industry standards** and certifications
   - **Expertise in network** and communication protocols
   - Expertise in **using AI** and **ML** for engineering, design and innovation
   - Have **high-availability systems** for critical operations
   - Expertise in **zero trust architecture**
   - Expertise in **developing high-fidelity simulations**
   - Proven **integration of VR and AR** technologies into training modules
   - Track record of **working with** industry-leading **A&D companies**
   - Expertise in **MES software**
4. Demonstrate strong **partnerships with AI research organizations** or labs, industry associations, regulatory bodies, technology firms and start-ups specializing in the A&D industry
5. Offer **referenceable A&D use cases** for various services and solutions across the value chain

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Definition

The A&D MRO (maintenance, repair and overhaul) market in 2026 is marked by robust growth driven by aging fleets, increased air travel demand and rapid technological advancements. Key trends include widespread AI adoption and predictive analytics for enhanced maintenance planning and minimized aircraft downtime. Digitalization and automation streamline workflows, improving operational efficiency and asset reliability while controlling lifecycle costs.

Geographically, Europe is expected to witness the fastest MRO market growth due to regulatory harmonization and increased cross-border collaborations. North America remains a significant market owing to a large, aging fleet and strong defense spending. Sustainability and cost optimization are prioritized, prompting MRO providers to innovate with advanced materials and aftermarket services. Challenges such as workforce skill shortages and supply chain risks encourage investments in training and digital supply networks.

Eligibility Criteria

1. Demonstrate **experience in offering MRO and aftermarket services** and solutions for OEM clients in the A&D industry
2. Showcase **successful MRO and aftermarket-related engagements** with at least three A&D companies
3. Have at least three of the following capabilities in areas related to MRO and aftermarket:
   - Expertise in **predictive analytics**
   - Expertise in **condition-based monitoring**
   - Experience in **asset lifecycle management**
   - Expertise in **ERP system implementation**
   - Proven **deployment of IIoT, digital twin and additive manufacturing** solutions
   - Proactive maintenance and **rapid deployment capabilities**
   - **Integration** with live, virtual and constructive (LVC) **training systems**
   - Expertise in parts management
4. Demonstrate **strong partnerships with AI research organizations or labs**, industry associations, regulatory bodies, technology firms and start-ups specializing in the A&D industry
5. Offer **referenceable A&D use cases** for various services and solutions across the value chain

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Definition

In 2026, A&D supply chain and logistics management will be defined by resilience and digital transformation. The industry faces ongoing challenges due to material shortage, geopolitical risks and demand for faster production rates. Companies will focus on diversifying suppliers, adopting advanced digital tools such as AI and analytics for supply chain visibility and strengthening local and multicountry manufacturing footprints to mitigate disruptions. Enhanced cybersecurity measures will protect sensitive data throughout the supply chain. Sustainability initiatives and regulatory compliance will shape sourcing strategies, emphasizing energy efficiency and waste reduction.

Supply chain agility will be essential to meet accelerating production rates, especially for defense contracts requiring rapid capability deployment. This includes lean manufacturing integration and supplier development programs aimed at strengthening lower tier supply bases.

Eligibility Criteria

1. **Experience in supply chain operations and logistics management** services and solutions for OEMs in the A&D industry
2. **Successful supply chain operations and logistics management-related engagements** with at least three A&D companies
3. Have at least three of the following capabilities in the areas of supply chain operations and logistics management:
   - Proven **deployment of IIoT, digital twin and additive manufacturing** solutions
   - Expertise in geographic information systems **(GIS) implementation**
   - Proven **deployment of AI and ML** in autonomous systems
   - Ability to **secure supply chain networks from cyber threats**
   - Expertise in **warehouse management**
   - Have logistics and transportation **management systems**
   - Expertise in **purchasing processes**
   - Traceability systems
   - Expertise in scheduling
   - Proactive **order management** capabilities
   - Expertise in **control tower operations**
   - Expertise in **demand planning**
   - Expertise in third-party risk management
   - Proven solutions for supply chain and procurement optimization
   - Expertise in supply chain segmentation
4. **Strong partnerships with AI research organizations**, industry associations, regulatory bodies, technology firms and start-ups within the A&D industry
5. Offer **referenceable A&D use cases** for various services and solutions across the value chain

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Definition

Advancements in AI, automation and digital integration drive technology transformation in the A&D industry. AI-powered systems enhance defense capabilities through autonomous platforms, predictive maintenance and cybersecurity, enabling rapid mission planning and threat response. Immersive technologies such as VR and AR improve training efficiency, while digital twins and model-based definitions streamline design and production processes. Additive manufacturing is expanding into production, using lightweight, complex components that boost performance and reduce costs.

A&D consulting services focus on guiding enterprises through digital transformation and innovation adoption. Key areas include integrating advanced materials, optimizing supply chains with digital tools and ensuring compliance with evolving standards such as ITAR and AS9100. The shift toward rapid capability deployment and sustainable solutions demands strategic advisory to align technology investment with market opportunities and regulatory requirements.

Eligibility Criteria

1. Experience in **offering technology transformation and consulting services** and solutions for OEM clients in the A&D industry
2. Demonstrate **successful technology transformation and consulting services-related engagements** with at least three A&D companies
3. Have at least three of the following capabilities in the areas of technology transformation and consulting:
   - Support for **secure and encrypted data exchange**
   - Expertise in **disaster recovery systems**
   - Expertise in **connected aircraft** and related solutions
   - Experience in energy **efficiency and carbon footprint tracking**
   - Expertise in **airline or fleet/ route optimization** software
   - Expertise in **ERP systems**
   - Have a 24 by 7 security operations center **(SOC)** and network operations center **(NOC)**
4. Demonstrate **strong partnerships with AI research organizations** or labs, industry associations, regulatory bodies, technology firms and start-ups specializing in the A&D industry.
5. Offer **referenceable A&D use cases** for various services and solutions across the value chain

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Quadrants by Regions

As a part of this ISG Provider Lens quadrant study, we are introducing the following four quadrants in the Aerospace and Defense Services and Solutions 2026 report for the overall service provider ecosystem and one quadrant for midsize and specialist IT services providers:

Quadrant	U.S.	Europe	Global
Overall Service Provider Ecosystem			
Engineering, Design and Innovation	✓	✓	
Maintenance, Repairs and Overhaul (MRO) and Aftermarket	✓	✓	
Supply Chain Operations and Logistics Management	✓	✓	
Technology Transformation and Consulting	✓	✓	
Midsize and Specialists IT Services Providers			
Aerospace and Defense Services			✓

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Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the A&D services and solutions market and helps connect them to digital solutions
- Represents the entire supply and demand value chain within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions

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The research phase falls in the period between January and March 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in May 2026.

Milestones	Beginning	End
Survey Launch	December 10th, 2025	
Survey Phase	December 11th, 2025	January 16th, 2026
Sneak Preview	March 2026	
Press Release & Publication	May 2026	

Please refer to the **ISG Provider Lens® 2026** research agenda to view and download the list of other studies conducted by ISG Provider Lens.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Aerospace and Defense IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

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ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

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Methodology & Team

The ISG Provider Lens® 2026 – Aerospace and Defense Services and Solutions research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

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Arjun Das

Data Analyst:
Sumit Kumar

Project Manager:
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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars ($US) unless noted.

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Data Analyst

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ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

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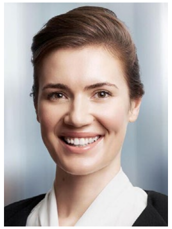
Digital Engineering Solutions Lead Americas



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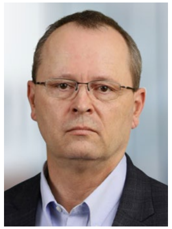

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Partner – Research Management

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Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

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ACL Digital
AFRY
Akkodis
All4One
Altair Engineering, Inc.
Altimetrik
Altran
Ammentum
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Ascendion
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Axiscades
Bell Techlogix
Bertrandt
Birlasoft
Capgemini
Capita Plc
Caresoft Global
Cenit AG
Centum Electronics
Ceva Logistics B.V.
CGI
CI&T
ClearStar, Inc.
Coforge
Cognisys
Cognitus Consulting
Cognizant
Combitech (SAAB AB)
Computacenter
Copello Global Ltd
Cyient
Datamatics Global Services
Delaware Digital
Deloitte
DXC Technology
Econocom Group SE
EDAG
eInfochips
Encora
Endava
Engineering Industries eXcellence
Eviden (an Atos Business)
EXL Service
Expleo
EY
FORCAM
FPT Software
Fujitsu
General Dynamics IT
Genpact
GlobalLogic
Globant
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Happiest Minds
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LTTS
Mastek
MCS Group
MHP

Microland
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Nagarro
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Ness Digital
N-iX
NTT DATA
Orange Business Services
Perficient
Persistent Systems
Publicis Sapient
PwC
Qualitest
Quest Global
Randstad Digital

Robosoft Technologies
Safran Engineering Services
SAIC
Semcon AB
Serco
Siemens Advanta
SII
Sofftek
Sopra Steria
Stefanini
Sutherland
Synoptek
Tata Elxsi
Tata Technologies
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ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

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ISG Provider Lens®

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BROCHURE: AEROSPACE AND DEFENSE SERVICES AND SOLUTIONS

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