

Manufacturing Industry Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators



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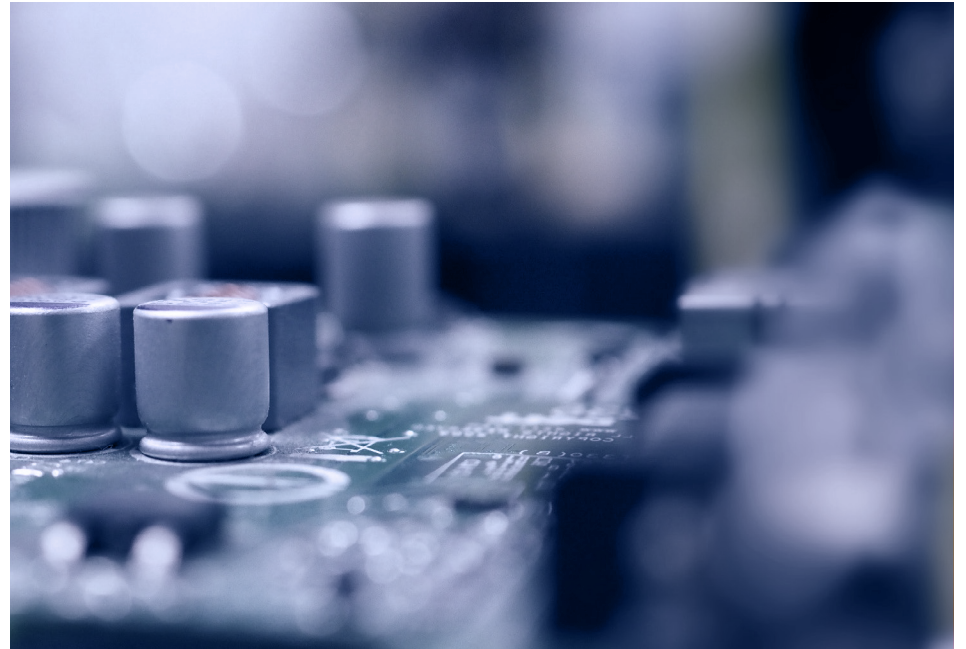
Global manufacturing in 2026 continues to be shaped by economic uncertainties, geopolitical fragmentation, evolving trade policies and supply chain restructuring. Manufacturers are navigating an operating environment characterized by region-specific strategies, regulatory pressures and persistent cost challenges. As they balance growth, resilience and profitability, the ability to adapt operations, supply networks and business models has become a key differentiator.

Manufacturers are accelerating investments in operational modernization. Advanced engineering, software-defined products, AI, digital twins and industrial IoT (IIoT) are helping them improve product development, manage growing product complexity and enhance manufacturing readiness. Engineering teams are adopting AI and model-based and simulation-driven development for efficiency, quality and speed-to-market.

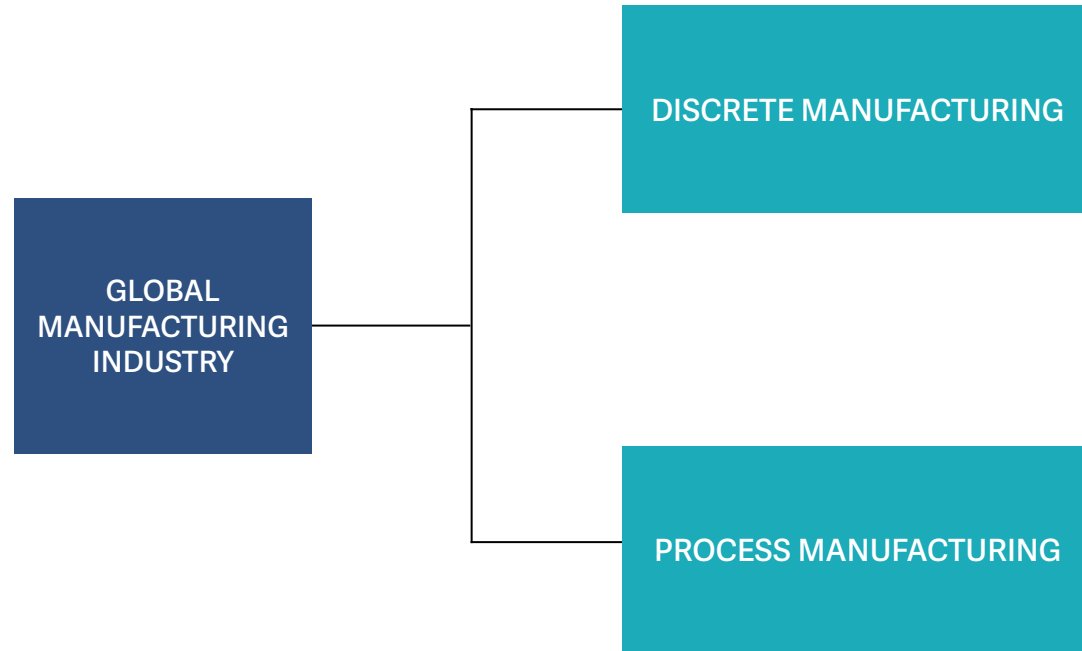
Manufacturers are going beyond traditional Industry 4.0 initiatives toward more intelligent and adaptive operations. Investments in automation, robotics, computer vision, edge

computing and industrial AI are improving production performance, asset utilization and operational resilience. Emerging physical AI capabilities are enhancing operations, enabling intelligent systems to suitably respond to real-world manufacturing conditions, supporting use cases such as autonomous inspection, adaptive production systems and intelligent robotics.

Manufacturers that can modernize engineering functions, optimize factory operations, strengthen supply chain ecosystems and leverage intelligent technologies to drive agility, productivity and long-term competitiveness are geared to see success.



Manufacturing Industry Structure

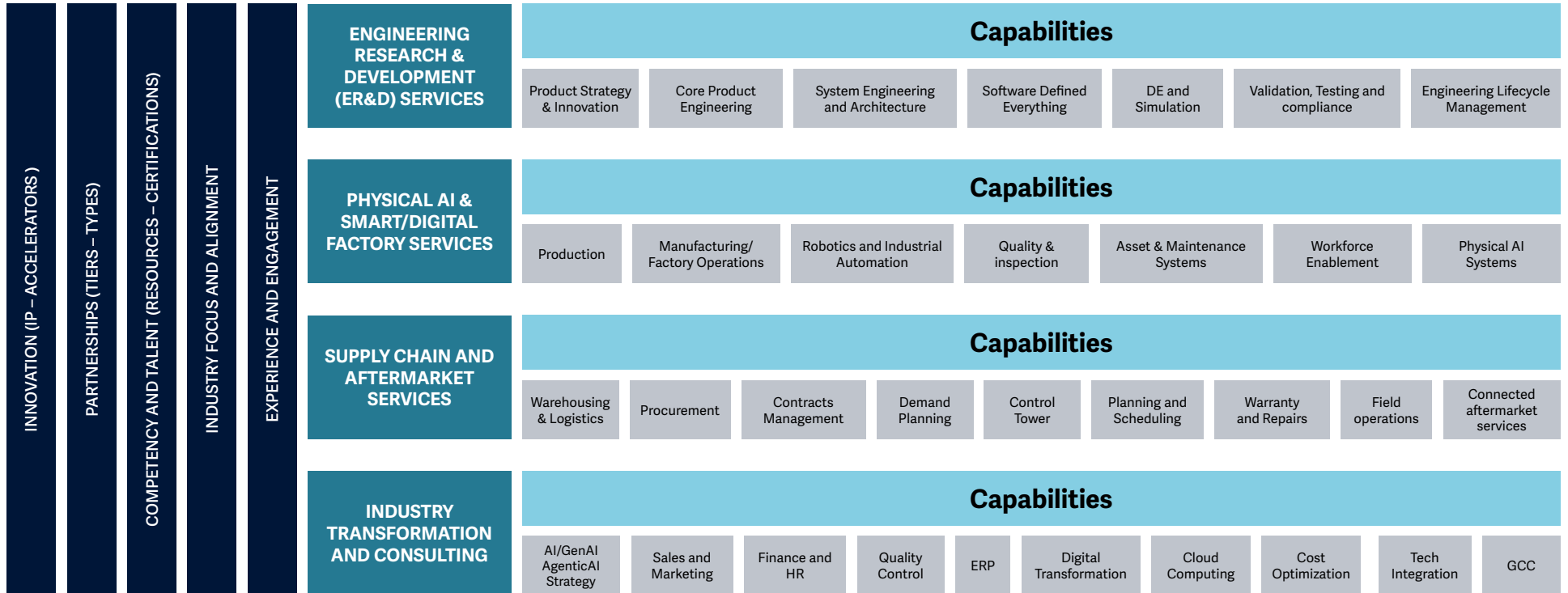


- Aerospace
- Hitech and Semiconductor
- Industrial Machinery
- Automotive Manufacturing
- Metallic and Non- metallic products

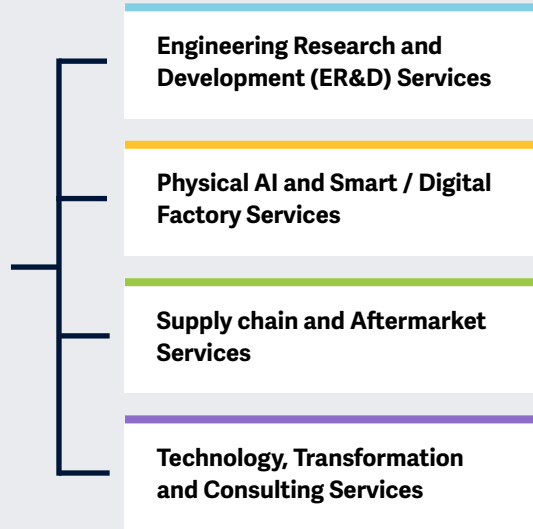
-
- Food & Beverage
 - Apparel
 - Paper and paper products
 - Pharma and chemicals
 - Plastic and rubber
 - Oil and gas (downstream)



Manufacturing Industry Services and Solutions 2026



This study explores the challenges faced by the manufacturing industry and assesses provider capabilities in addressing enterprise needs.



Simplified Illustration Source: ISG 2026

Definition

The ISG Provider Lens® Manufacturing Industry 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 on their competitive strengths and portfolio attractiveness.
- Focus on markets in North America 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.



Engineering Research and Development (ER&D) Services

Definition

This quadrant focuses on providers offering services and solutions to help manufacturing companies design, develop, test, industrialize and manage production and engineering processes across a product lifecycle. It encompasses product engineering services, including product design, systems engineering, embedded and software engineering, testing, validation and lifecycle support, as well as process engineering services, including manufacturing engineering, industrial engineering, process design, tooling, commissioning and production readiness.

These services leverage technologies such as simulation, digital twins, AI-assisted engineering, product lifecycle management (PLM) systems and connected engineering platforms to improve innovation, product quality, engineering productivity and time-to-market. ER&D services help organizations bridge the gap between product development and manufacturing readiness, while accelerating industrialization and engineering transformation across manufacturing.

Eligibility Criteria

1. **Drive transformation and product innovation** through multi-disciplinary engineering and manufacturing expertise
2. **Apply engineering best practices**, including systems engineering, MBSE, requirements management, functional safety and multi-domain integration
3. **Demonstrate alignment of engineering and manufacturing operations** to accelerate product development and industrialization
4. Have offerings in **at least three of the following areas**:
 - Mechanical engineering
 - Electrical/electronic engineering
 - Embedded and firmware engineering
 - Design and development
 - Software engineering
 - Mechatronics and control systems
 - CAD/CAE
 - Testing/Simulation
 - Digital twins and virtual validation
 - AI-assisted engineering and testing
 - Manufacturing engineering and industrialization
 - PLM and digital thread
5. Show expertise in **AI-assisted engineering, generative engineering, digital twins and autonomous validation**
6. **Partner** with software engineering providers, technology firms, semiconductor ecosystem players, industrial manufacturers and industry associations
7. Demonstrate **referenceable case studies on** engineering-led manufacturing transformation, intelligent product development and industrialization initiatives across manufacturing processes



Definition

This quadrant focuses on providers offering services and solutions to help manufacturers transform factories via smart manufacturing, industrial automation and intelligent operating systems. It covers Industry 4.0 and emerging Industry 5.0 initiatives, including connected factories, intelligent quality management, predictive maintenance and physical AI-enabled operations.

Smart manufacturing solutions also help companies implement strategies from the boardroom to the shop floor. As manufacturers navigate challenges such as obsolete networks and infrastructure, fragmented OT and IT layers, data silos and limited collaboration between IT and operations, a defined smart manufacturing strategy can streamline shop-floor operations.

In manufacturing environments, providers foster the use of physical AI for capabilities such as intelligent robotics, autonomous inspection, adaptive production systems, AI-assisted operations and autonomous material movement

Eligibility Criteria

1. **Drive smart factory transformation and intelligent manufacturing initiatives**, leveraging OT, automation, industrial engineering and AI expertise
2. **Apply best practices** across connected operations, industrial automation, intelligent manufacturing and operational transformation
3. **Foster alignment between factory operations and enterprise systems to improve performance, visibility, quality of manufacturing and workforce productivity**
4. **Have offerings in at least three of the following areas:**
 - MES/MOM services
 - Shop-floor digitalization
 - Production orchestration
 - Connected factory operations
 - Industrial automation and robotics
 - Physical AI and autonomous operations
 - Intelligent quality inspection
 - Predictive maintenance and asset performance management
 - IIoT, edge AI and industrial intelligence
5. **Show expertise in next-generation technologies such as physical AI**, industrial AI agents, digital twins, autonomous manufacturing systems and industrial cybersecurity
6. **Partner** with automation, robotics, OT, cloud and manufacturing technology providers, as well as industry associations
7. **Demonstrate referenceable case studies** on successful smart manufacturing and factory transformation initiatives across manufacturing processes
8. **Demonstrate capabilities** in applying physical AI technologies that combine AI, robotics, automation, computer vision, IIoT, sensing technologies and operational data to enable intelligent, adaptive, and semi-autonomous manufacturing operations



Definition

This quadrant focuses on providers offering services and solutions to help companies manage procurement, warehousing, inventories, fulfillment and transportation/logistics in the supply chain space alongside spare parts management, field operations, end-of-life services, and warranty and guarantee services in the aftermarket space. Manufacturing companies are increasingly investing in blockchain, automation, AI/GenAI, intelligent workflows, partner ecosystems and sustainability to optimize the above mentioned spaces.

Manufacturers are prioritizing automation in supply chains, procurement and aftermarket processes. With rapid technological advancements, the manufacturing industry is witnessing the emergence of new business models such as service lifecycle management and subscription services. They need to optimize the use of AI and ML to enhance personalized customer services, improve decision-making and drive end-to-end digitalization, thereby augmenting UX and CX across online and mobile platforms.

Eligibility Criteria

1. Have experience in **supply chain and aftermarket consulting and implementation**
2. Demonstrate **successful supply chain and aftermarket engagements** with 2-3 manufacturing firms
3. Have offerings **in more than two** of the following areas:
 - Warehouse management
 - Logistics and transportation management systems
 - Purchasing
 - Shipping
 - Traceability
 - Scheduling
 - Order management
 - Control tower
 - Forecasting
 - Demand planning
 - Materials management
 - Third-party risk management
 - Supply chain and procurement optimization
 - Supply chain segmentation
 - Supply chain planning and BPO
 - Sustainability solutions in procurement and supply chain
 - Controls management
 - Warranty management
 - Analytics and reporting
 - Field management services
 - Inventory optimization
 - Spare parts and sales
 - Pricing management
 - Contract management
 - CX/UX
 - Service information systems
 - Remote troubleshooting tools
 - Reverse logistics
4. Have expertise in **next-gen technologies** – automation, analytics, IoT, AI, cybersecurity, cloud and blockchain
5. **Partner** with industry associations, regulatory bodies, technology firms and manufacturing startups
6. Show **referenceable case studies** across the manufacturing value chain in key areas such as AI, GenAI and other next-gen technologies



Definition

This quadrant assesses providers that offer consulting and digital transformation solutions and services to help manufacturing companies modernize their IT infrastructure, streamline operations, improve efficiency and support business transformation initiatives.

The services include application development and maintenance (ADM), infrastructure services (data center, cloud, network, workplace and cybersecurity) and systems integration for new applications across the value chain. They enable manufacturers to increase efficiency, ensure compliance, reduce costs, optimize assets and maximize customer satisfaction.

IT consulting and solutions in the manufacturing industry use data, cloud and AI to improve efficiency and CX. Manufacturing firms aim to achieve transformation by simplifying processes and leveraging reengineering, digital tools and methodologies that align with strategic objectives to increase revenue, optimize costs, achieve operational excellence and enhance business process efficiency.

Eligibility Criteria

1. Show initiatives in **business and operations strategy, change management** and end-to-end transformation
2. Have experience in **re-organizing IT operating models** to align with changing business demands such as GCCs, nearshoring, offshoring and agility
3. **Demonstrate expertise in offering a combination** (if not all) of the following across the value chain:
 - Net zero and decarbonization strategy
 - Regulatory, compliance and market design advisory
 - Digital strategy and roadmap development
 - Cloud migration and infrastructure modernization
 - Enterprise data management and analytics platforms
 - AI and ML integration
 - Workforce digital enablement solutions
 - Change management
 - Training, onboarding and knowledge automation
 - GenAI for digital twin and asset optimization
 - Blockchain for energy trading
 - ERP
 - M&A advisory
 - Operational consulting
 - Robotics and automation
 - Industry 4.0 initiatives (IT/OT integration)
 - Cybersecurity and OT security
4. **Partner** with industry associations, regulatory bodies, technology firms and manufacturing startups
5. Have **experience in large transition engagements** that include post-merger integration, business transformation and cybersecurity
6. **Show referenceable case studies** across the value chain in key areas such as **AI, GenAI, agentic AI and other next-gen technologies**



Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants on Manufacturing Industry Services and Solutions 2026:

| Quadrants | Europe | North America |
|--|--------|---------------|
| Engineering Research & Development (ER&D) Services | ✓ | ✓ |
| Physical AI and Smart / Digital Factory Services | ✓ | ✓ |
| Supply Chain and Aftermarket Services | ✓ | ✓ |
| Technology, Transformation and Consulting Services | ✓ | ✓ |



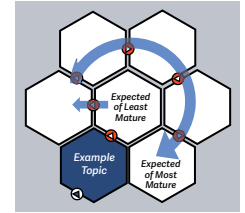
ISG's Manufacturing Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Manufacturing Industry Services and Solutions 2026 market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand 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



Understanding the Mosaic



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

| Milestones | Beginning | End |
|-----------------------------|------------------|---------------|
| Survey Launch | June 15, 2026 | |
| Survey Phase | June 15, 2026 | July 15, 2026 |
| Sneak Preview | September 2026 | October 2026 |
| Press Release & Publication | November 2026 | |

Collecting client testimonials via the Star of Excellence® Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens® 2026 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the instructions 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 Manufacturing Industry Services and Solutions 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 conducting 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.



ISG Star of Excellence® — Call for nominations

The Star of Excellence® is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence® program 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 are 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 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.

Our vision for the Star of Excellence® is to become acknowledged 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 "Nominate (for Providers)" 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



The ISG Provider Lens® 2026 – Manufacturing Industry Services and Solutions 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.

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The research and analysis presented in this report includes research 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. The data collected for this report represent information that ISG believes to be current as of June 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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



Contacts For This Study

Study Sponsor



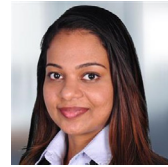
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Director



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ISG Provider Lens® 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 consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure 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 consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

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

ISG Advisors for this study



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Director - North America



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**Digital Engineering
Solutions Lead - North
America**

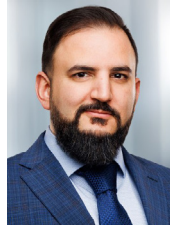


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Europe**



Ryan
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Director - North America



Swadhin
Pradhan

**Assistant Director
and Principal Analyst**



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.

* Rated in previous iteration

Accenture

Accso

ACL Digital*

Adesso

Akkodis

All For One Group*

Allied Digital

ALTEN

Altimetrik

amplimind

AsInt

Atos

AXISCADES*

Bell Technlogix

Bertrandt

BIP Group

Birlasoft*

Bluebinaries

Bosch SDS

Capgemini

CENIT

Centum Electronics

CGI

Ciklum

CMIT Solutions

CMS IT Services

Coforge

Cognisys

Cognizant

Computacenter

Convista

Cyient*

Datamatics Global Services

Delaware North America

Deloitte

DXC Technology

EDAG

eInfochips*

ELEKS

Encora

Endava

Engineering Industries eXcellence*

EPAM

Eviden (an Atos Business)

EXL

Expleo

EY

FEV

Firstsource

FORCAM

FPT Software*

Fujitsu

Genpact

Globant

Happiest Minds*

HARMAN DTS (Wipro Engineering
Connected Services)*

HCLTech

Hexaware*

Hinduja Tech

Hitachi Digital Services*



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* Rated in previous iteration

| | | | |
|------------------|---------------------------------|--------------------------|-----------------------------|
| IAV | KPIT | Nagarro* | Publicis Sapient |
| IBM | KPMG | NCS | PwC |
| Inetum | Kyndryl | NEC | Qualitest |
| Infogain | LTM | Neilsoft | Quest Global* |
| Infosys | LTTS (L&T Technology Services)* | Ness | R Systems |
| Innominds | Mastek* | N iX LLC | Randstad Digital* |
| Innova Solutions | Meriplex | NOYNIM IT Solutions | Reply |
| Innover Digital | Metafyre | Ntiva | Sasken |
| Inspirage | MHP – A Porsche Company* | NTT DATA | ScienceSoft USA Corporation |
| Intelizign | Microland | Onward technologies | Sentinel Technologies |
| Intellias | Mindsprint | Orange Business Services | Shift 5 |
| ITC Infotech* | Motherson Technology Services | Orion Innovation | SII |
| Itransition | Movate | Perficient* | Softdel |
| Kongsberg IT | Mphasis | Persistent Systems* | Softtek* |
| Korecomptenz | Myntex | Prescient Solutions | Sonata Software |



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* Rated in previous iteration

Sopra Steria

Yash

Stefanini*

Zensar Technologies*

Sutherland

Synoptek

Syntax*

Tata Elxsi*

Tata Technologies

TCS

Tech Mahindra

Tietoenvy

T-Systems

UST*

Virtusa

Wipro

WNS



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. 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](#).

Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties and cities) and higher education institutions. Visit: [Public Sector](#).

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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.





JUNE, 2026



BROCHURE: MANUFACTURING INDUSTRY SERVICES AND SOLUTIONS