

Manufacturing Industry Services

Digital Engineering – Industrial

Europe 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

HCL

December 2021

About this Report

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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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of Nov 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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ISG Provider Lens™



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EXECUTIVE SUMMARY

European Enterprises are reconfiguring their strategies to accelerate their go-to-market plans, improve digital marketing models, and adopt direct-to-consumer business models for expanding their clientele and market base. They are doing this by leveraging cloud for its agility. Most of them want to engage with service providers by creating new reference architectures that will focus on bringing resiliency in operations, adopting an integrated stack approach, establishing robust configuration management database (CMDB), and leveraging automation testing such as shift-left techniques.

For the industries considered in this study, IPL has witnessed some of the following key trends:

Digital Engineering - Transportation

Bringing transparency in supply chain through predictive models: As the manufacturing industry is recovering from the pandemic aftershocks, the infrastructure and the associated supply chain should adapt to market product requirements. The recent supply shortage, especially semiconductors in the automotive industry, has driven enterprises to strategize ways of transforming its product architecture to become less dependent on supplies. This has led to drastic changes in the entire supply chain process, pushing market participants across the automotive value chain to work with service providers for achieving cost effectiveness. In some cases, companies are using AI for client or customer forecasts.

Electric mobility gaining precedence due to regional sustainability goals: With regional sustainability goals in place, European automakers and tier 1s have showcased a strong agenda around electric vehicles. In Europe, the scaling up of electric vehicle infrastructure and their large-scale deployment and adoption have gained precedence over autonomous technologies. Most European automakers have announced cutover plans for the electric architecture of passenger vehicles, especially the German manufacturers. However, despite the rapid acceleration towards electrification, there exists a significant challenge toward realizing these ambitions.

Digital Engineering – Hi-Tech

Demand and adoption of custom ASICs: European enterprises from different cross-sections of various industries are opting for custom application-specific integrated circuits (ASICs) over traditional, complex processors and system on chips (SoCs). With the rapid adoption of the IoT and edge computing, multiple sensors are being integrated in the edge to deliver end-to-end intelligent and powerful systems. Even mid-sized companies are considering developing their own custom ASICs, which can drive scalability and cost effectiveness at the edge. Service providers have accordingly evolved their offerings from the conventional design, verification, physical design and validation processes across different stages of an ASIC. Concurrently, service providers are developing smaller and less complex ASICs through turnkey development engagements for clients that are new to this space. Several dual in-line package (DIP) providers and electronic design automation

(EDA) tool vendors are now increasingly involved across different levels of design and development. New developments on the edge in several industries such as healthcare for functions around transforming the ultrasound space are driving the demand for custom ASICs. In the automotive space, enterprises are redefining their mission and vision at the edge and are developing their own SoCs. Thus, several non-traditional enterprises are tapping the ASIC space and integrated circuit (IC) development space, where service providers are packaging their offerings.

Combatting chip shortage on the older fab lines: Presently, one of the major challenges is the chip shortage across all industries, particularly the automotive vertical. As it takes a long time to build a new fab and these are not usually built for old nodes; however, there is a shortage of 28 and 65nm fabs. On the other hand, fabs are available for 3 and 5nm nodes, which are applicable for servers, mobile and laptop processors. Most of the new investments are directed towards new nodes and there is an ever-increasing demand from medical, industrial, and automotive verticals. The automotive industry typically uses 40 and 28nm nodes that are limited in supply. ISG predicts that this issue will last till at least 2023 unless there is a drastic change in demand, for example, the demand on older nodes shifting to newer ones. The shortage is thus expected to ease up when the automotive industry starts moving to zonal computing or begins using more high-performance parts, gradually migrating away from old nodes.

Digital Engineering - Industrial

Fluidizing manufacturing functionalities with 5G: Many off-highway vehicle



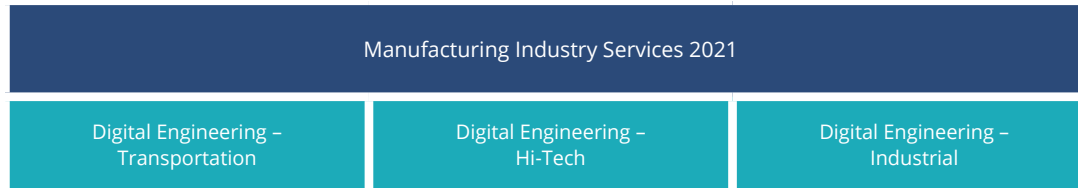
manufacturing plants are exploring opportunities with mobile private networks to implement a visual-based inspection system. This has influenced engineering service providers to partner with relevant mobile virtual network operators (MVNOs) that can make plants 5G enabled. They can help create vision-based techniques for product quality checking, as well as other functionalities.

Requirement for optimizing manufacturing output: The volumes realized in the industrial or off-highway vehicle space is not as high as passenger or commercial automotive. With the industry presently witnessing moderate to low volumes, it is critical for manufacturers to optimize their output. One of the key strategies adopted by the industry participants is significant manufacturing shopfloor integration across agriculture, construction and heavy vehicles. They are also integrating many layers of automation in the manufacturing side for automotive market participants, and this trend is gradually extending towards the off-highway vehicle segment. This has influenced market participants to consider full-scale automation of the assembly line and automation of supply chain functionalities including warehouse and lineside supply.

Over the last few years, outsourcers have scaled up their association with original equipment manufacturers (OEMs). As a result, the number of integrated deals with OEMs, including application, infrastructure, business process management (BPM) and legacy modernization, have been on the rise. Also, as-a-service consumption-based and catalog-based models, including device as a service, platform as a service and captive carve-out, are picking up.

Introduction

Simplified illustration



Source: ISG 2021

Definition

The ISG Provider Lens™ Manufacturing Industry Services 2021 study tracks and analyzes the offerings around several elements of manufacturing, covering intricacies from product engineering such as design, development, pilot scale and industry scale production to shop floor manufacturing and remote product operations. Spanning the entire lifecycle of a product, from whiteboarding and 3D simulation to shop floor robotics, the report analyzes the major disruptions taking place in the industry.

Automation plays a significant role, spreading across components such as manufacturing operations management (MOM) and manufacturing execution systems (MES), as well as capturing process data and storing it in the cloud or inside the new edge. Service providers have been working extensively on shopfloor transformation and integrated product development. They are bringing together electrical, electronic, mechanical, embedded and software components with conventional mechanical, electronics and electrical engineering. This has resulted in a

Definition (cont.)

combination of MES and product lifecycle management (PLM) solutions with cutting-edge machine-to-machine (M2M) connectivity and AI-driven insights. The solutions use insights to drive the underlying product and manufacturing engineering for the IoT stratagem.

The study examines the role of service and solution providers across the entire value chain of manufacturing industry. It covers product engineering, design capabilities and pilot-scale implementations, virtual layout or simulation of the shop floor, ergonomics for machinery, IT and operational technology convergence, and aftermarket services. It also analyzes the capabilities of providers around aftersales support such as leveraging digital twins to check the condition of machinery as it reaches the wear-out period. In the three quadrants of this study — digital engineering capabilities for transportation, high-tech and industrial segments, ISG will consider the providers' ability to automate shopfloor functions across the entire ecosystem of digital manufacturing, from the implementation of MES, MOM, PLM and supply chain systems to product development and launch. Analysis of the business in terms of new-age technologies such as remote monitoring of the production line (which necessitates moving workloads to cloud) and providing momentum to IoT, cloud, augmented reality, virtual reality and similar other technologies are focus areas. Overall, the quadrants analyze the attributes of

providers for empowering organizations to transform a client into a digital enterprise and accelerate digital strategy implementations. ISG will also analyze the providers ability' to implement predictive maintenance decisions such as scheduling diagnosis and roadmaps around capabilities in technologies such as 3D printing, augmented reality, virtual reality and other use cases of virtualization in several business landscapes. The ability to integrate security in every layer of product and manufacturing engineering with in-house capabilities or partnerships will be assessed.

Scope of the Report

ISG sets out to deliver a comprehensive research program with clear and extensive evaluation criteria, covering the developments and deliverables of service providers and solution suppliers in this dynamic market. This study accounts for changing market requirements and provides a consistent market overview for the segments, along with concrete decision-making support to help user organizations evaluate and assess the offerings and performance of providers.

The ISG Provider Lens™ study offers IT, engineering, manufacturing, procurement and CDOs as well as R&D decision makers the following:

- Transparency on the strengths and weaknesses of relevant services and solution providers
- Differentiated positioning of providers by segments
- Perspective on several markets, including global, the U.S. and Europe

Our study serves as an important decision-making basis for positioning, key relationship 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.



Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Manufacturing Industry Services - Quadrant Provider Listing 1 of 4

	Digital Engineering – Transportation	Digital Engineering – Hi-Tech	Digital Engineering – Industrial
AKKA	● Leader	● Not In	● Product Challenger
Alten	● Leader	● Not In	● Not In
ALTEN Calsoft Labs	● Not in	● Product Challenger	● Not In
Atos	● Market Challenger	● Not In	● Not In
Axiscades	● Contender	● Contender	● Contender
Bertrandt	● Leader	● Not In	● Leader
Capgemini	● Leader	● Leader	● Leader
Caresoft Global	● Rising Star	● Not In	● Market Challenger
Cognizant	● Product Challenger	● Not In	● Not In
Cyient	● Product Challenger	● Product Challenger	● Product Challenger
Dextra Technologies	● Not in	● Contender	● Not In

Manufacturing Industry Services - Quadrant Provider Listing 2 of 4


	Digital Engineering – Transportation	Digital Engineering – Hi-Tech	Digital Engineering – Industrial
DXC	● Product Challenger	● Not In	● Not In
EDAG	● Product Challenger	● Not In	● Not In
eInfochips	● Not in	● Leader	● Not In
Expleo	● Product Challenger	● Not In	● Product Challenger
Ferchau	● Market Challenger	● Not In	● Not In
FEV	● Product Challenger	● Not In	● Not In
Happiest Minds	● Not in	● Product Challenger	● Not In
HCL	● Leader	● Leader	● Leader
Hitachi (GlobalLogic)	● Product Challenger	● Product Challenger	● Not In
IAV	● Leader	● Not In	● Rising Star

Manufacturing Industry Services - Quadrant Provider Listing 3 of 4

	Digital Engineering – Transportation	Digital Engineering – Hi-Tech	Digital Engineering – Industrial
IBM	● Not in	● Market Challenger	● Not In
Ignitarium	● Not in	● Rising Star	● Not In
Infosys	● Leader	● Product Challenger	● Product Challenger
KPIT	● Product Challenger	● Not In	● Not In
KPIT (Pathpartner)	● Not in	● Product Challenger	● Not In
LTTS	● Leader	● Rising Star	● Leader
Mindteck	● Not in	● Contender	● Not In
Mindtree	● Market Challenger	● Not In	● Not In
Mphasis	● Not in	● Product Challenger	● Not In
Neilsoft	● Not in	● Not in	● Contender

Manufacturing Industry Services - Quadrant Provider Listing 4 of 4

	Digital Engineering – Transportation	Digital Engineering – Hi-Tech	Digital Engineering – Industrial
QuEST Global	● Product Challenger	● Product Challenger	● Not In
R Systems	● Not in	● Market Challenger	● Not In
Sasken	● Contender	● Product Challenger	● Contender
TATA Elxsi	● Product Challenger	● Product Challenger	● Product Challenger
TCS	● Leader	● Leader	● Not In
Tech Mahindra	● Leader	● Leader	● Product Challenger
UST	● Not in	● Leader	● Not In
VVDN Technologies	● Not in	● Contender	● Not In
Wipro	● Leader	● Leader	● Leader
Zensar	● Contender	● Not In	● Not In

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The text "Manufacturing Industry Services Quadrants" is positioned on the right side of the image, in a white serif font.

Manufacturing Industry Services Quadrants

ENTERPRISE CONTEXT

Digital Engineering – Industrial

This report is relevant to enterprises in the industrial segment (off-highway transportation) in Europe for evaluating providers of digital engineering services.

In this quadrant report, ISG highlights the current market positioning of digital engineering service providers to enterprises in Europe, and how each provider addresses the key challenges faced in the region.

While the volume of production in the off-highway segment is low, sustaining the business in terms of technologies take the center stage in these dire times. One of the major areas of focus for the enterprises is the remote monitoring of the production line, providing momentum to IoT, cloud, AR/VR and similar other technologies. Although these would not be implemented in the short term, organizations with significant legacy systems are trying to sustain the production in whatever way possible, engaging lesser workforce in frequent shift changes or making some other arrangement. However, for the medium- to long-term, these enterprises are looking at remote monitoring of lines, which necessitates moving workloads to the cloud. The organizations with large paper-based operations, which were planning to go digital but hesitant due to the heavy initial investment, or were waiting to witness success of similar players in this space, are accelerating its digital strategy implementation.

Creating a digital replica or digital twin of the process or the design has been an area of interest in the industrial segment. This can drive the creation of a product twin, which includes the design cycle and test cycle. Thus, all the data extracted from the design

collates in the twin. Similarly, in case of a manufacturing twin, the data on materials, production line, connected machine and predictive maintenance is generated, which gets dissolved during the supply chain process. The service providers are, thus, looking at the possibility of a supply chain twin or a performance twin to help consumers operate. The digital replicas cumulatively provide a clear visibility and transparency across all different lifecycles, which can improve the time to market. Bringing in the data from all tools to a common big data platform, which has a common infrastructure and security, can provide the required integrated view to take actionable information from different functions.

Engineering and R&D leaders should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select product engineering and manufacturing-related services and solutions. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

Digital transformation professionals should read this report to understand how providers of digital engineering services fit their digital transformation initiatives (especially in the manufacturing spectrum) and how they compare with one another.

Manufacturing professionals should read this report to develop a better understanding of the current landscape of manufacturing engineering service providers in Europe.

IT and OT security leaders should read this report to see how service providers address the significant challenges of compliance and security while keeping the manufacturing operations seamless.

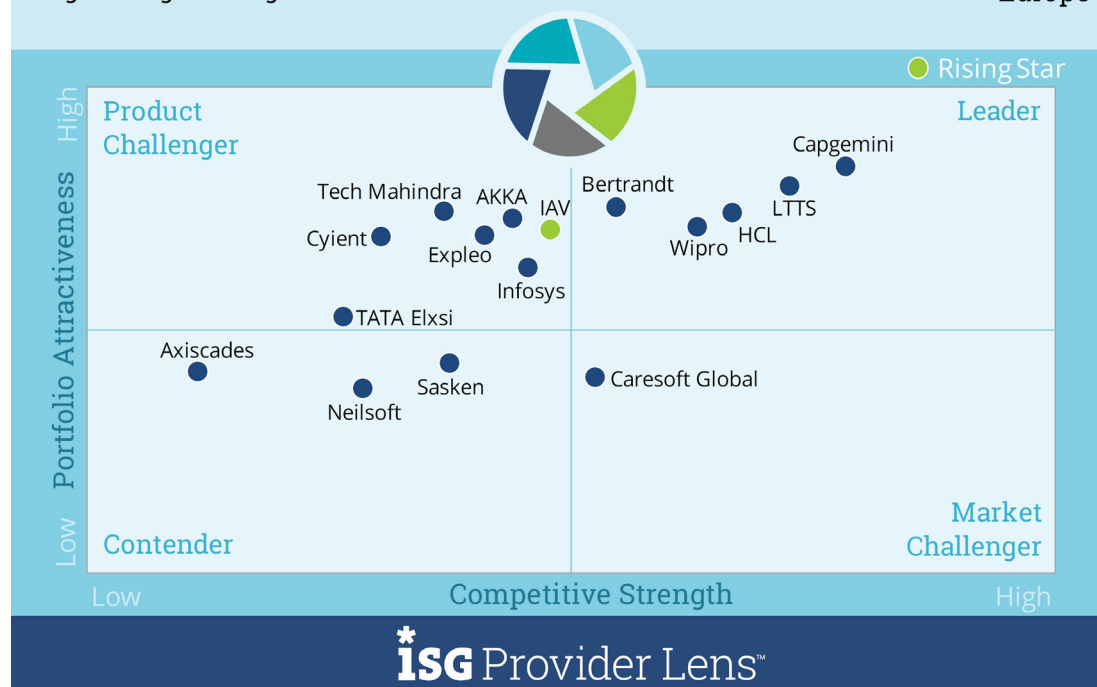
DIGITAL ENGINEERING – INDUSTRIAL

Definition

This quadrant analyzes the capability of service providers and system integrators to deliver product and manufacturing engineering services to enterprises operating in the industrial and heavy equipment segment (construction equipment, agriculture and forestry, materials handling and production machinery). ISG will analyze the service provider's value proposition of processes associated with product design, design support, design validation and manufacturing support across phases of concept generation, component and tool (jigs and fixture) design, hydraulic/harness routing, tolerance analysis, value engineering and re-engineering, 3D modeling, assembly management, static and dynamic analysis, etc. Overall, the quadrant analyzes the attributes of the providers empowering organizations to transform the industrial landscape and accelerate digital strategy implementation.

Manufacturing Industry Services Digital Engineering – Industrial

2021
Europe



Source: ISG Research 2021

DIGITAL ENGINEERING – INDUSTRIAL

Eligibility Criteria

- Ability to support services across levels of manufacturing engineering, post-pilot scale
- Demonstrate relevant experience in the consolidation of engineering services and deliver the right balance of onshore/offshore cost arbitrage
- Experience in engineering software development around application development, maintenance and support; engineering process automation and tools customization will have added advantage

Observations

Among the 16 participants in this quadrant, five were identified as Leaders and one as a Rising Star. Key observations about the providers, M&A, and key pointers about the Leaders:

- **Bertrandt** supports agriculture and forestry machinery manufacturers with a broad range of services in product development and adopting new-age technologies such as autonomous vehicles and electric mobility.
- **Capgemini** has been leveraging best practices from client success stories in the automotive vertical to enable clients in the off-highway vehicle segment to adopt digital technologies.
- **HCL** has been one of the prominent system integrators in the off-highway vehicle space, enabling clients to improve the operational and manufacturing efficiencies and optimize cost.
- **LTTS** plays a key role in product engineering of new-age off-highway equipment, from the conceptualizing phase of new technologies.
- **Wipro** has specifically created a digital thread foundation for off-highway market participants that lag in digital maturity, helping them to structure their digital ambitions with respect to new product development and aftermarket services.
- **IAV** (Rising Star) has been working on innovative technologies that can contribute significantly to new-age farming.

HCL



Overview

HCL, a Noida, India headquartered company, has developed a wide spectrum of solutions that tap every touchpoint of the evolving transportation ecosystem, covering hybrid and electric architecture and fuel cells for large vehicles while deploying the solutions governed by relevant use cases. The company has a significant footprint in the off-highway vehicle space in Europe.



Strengths

Meeting critical industry requirements through engineering prowess: Off-highway machines operate in a much harsher environment and require 100 percent uptime as the usage is continual. Keeping this mind, HCL sees the off-highway equipment space through a different lens when compared to other industry players. The company brings together a value proposition across mechanical, electrical and embedded systems to deliver the necessary operational efficiency without compromising on durability.

Supporting mining and construction equipment clients across various phases of product and manufacturing engineering: HCL is focused on identifying the bottlenecks in manufacturing service lines to improve assembly flow. Most of its accounts have existed for a decade or more, allowing the company to engage in turnkey projects that help improve the overall operational efficiency and materials handling optimization.

Evolution of legacy accounts in off-highway segment: While HCL has been a partner to OEM clients for decades, it has played a vital role in driving their engineering advances. The company has been engaging with a leading mining and construction equipment client for the installation of its first-generation and second-generation vehicle health monitoring system. It has also provided support for other product engineering activities around model-based design and engineering software.



Caution

The off-highway vehicle segment has been witnessing initiatives pertaining to sustainability, both from operations and manufacturing aspects. HCL should be prepared to tap more opportunities in this budding market.



2021 ISG Provider Lens™ Leader

HCL has been an engineering partner to some of the biggest off-highway vehicle manufacturers, delivering services across the layers of hardware, software and embedded systems.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

Methodology

METHODOLOGY

The "ISG Provider Lens™ 2021 – Manufacturing Industry Services" research study analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Manufacturing Industry Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy and Vision
 - Innovation
 - Brand Awareness and presence in the market
 - Sales and partner landscape
 - Breadth and Depth of portfolio of services offered
 - Technology Advancements



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Senior Lead Analyst

Avimanyu Basu brings over 10 years of extensive research experience to handle telecommunication and engineering and R&D services specific research deliverables for the program called ISG Provider Lens™ that is designed to deliver research on service provider intelligence. He is responsible for authoring reports on software defined networks and network function virtualization (SDN/NFV) and engineering services. He is also responsible for key vertical-oriented reports and thought leadership papers for manufacturing along with whitepapers revolving around specialized technologies showcased by different cross-section of enterprises.



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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, Partner and Global Head - ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ | Quadrant Report

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