

# Manufacturing Industry Services and Solutions

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:

**HCLTech**

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**By harnessing AI, manufacturers can enhance CX, optimize operations and develop innovative products**

The manufacturing industry is undergoing a period of significant transformation, driven by a confluence of technological advancements, economic shifts and evolving consumer expectations.

The industry is being impacted in areas such as smart manufacturing, supply chain optimization, aftermarket services and sustainability. Manufacturers are leveraging technologies such as IoT, AI, ML, digital twins, AR, VR and cloud to optimize production processes, improve quality and enhance efficiency. They are also implementing digital solutions to streamline supply chain operations, reduce costs and improve visibility. Aftermarket services are being placed at the forefront and integrated into core business processes to drive customer satisfaction and revenue.

The manufacturing industry is challenged by talent shortages, rising costs, the need to ensure regulatory compliance and cybersecurity threats. Attracting and retaining skilled workers to support digital transformation initiatives and meet evolving workforce needs continue to remain a challenge, especially as rising costs for raw materials and energy impact profitability. Navigating complex regulatory environments, particularly in areas such as environmental sustainability, cybersecurity and data privacy, also remains difficult as companies seek to harness data for AI and generative AI (GenAI) applications.

To successfully navigate these trends and challenges, manufacturing companies must adopt a strategic approach prioritizing innovation, sustainability and customer centricity. By embracing digital transformation, investing in advanced technologies and fostering a culture of continuous improvement, manufacturers can position themselves for long-term success in a rapidly changing industry.

# The manufacturing industry is transforming with **AI, GenAI, Digital Twins and Factory of the Future.**



ISG notes the following trends in the global manufacturing industry for 2024-25:

### **Factory of the future initiatives**

With connected operations powered by AI and ML, further facilitated by cloud and 5G networks to move information to the edge, today's factories are likely to be transformed into the plants of the future, revolutionizing the manufacturing ecosystem. The concept of the Factory of the Future includes intelligent, interconnected systems that optimize production processes, enhance efficiency and drive innovation. This transformation will facilitate end-to-end real-time supply chain planning and network optimization, shopfloor visibility, predictive asset maintenance, product portfolio optimization and demand forecasting. Manufacturers and providers will work together to harness AI to automate process control and optimize demand fluctuations, leverage data analytics to drive quality control and maintenance and continue to bring digital twins to the mainstream to increase supply chain visibility and identify vulnerabilities to mitigate risks. As manufacturing companies drive digital transformation initiatives, product

lifecycle management (PLM) will play a key role in enabling these outcomes.

### **Engineering-focused acquisitions to expand product design and development capabilities**

Companies such as Infosys and Cognizant have made acquisitions to bolster their engineering capabilities. The shortage of digital engineering skills required to drive scaled deployments continues to challenge the industry. Companies have moved from IT/OT to IT-OT-ET convergence, signifying the need for engineering capabilities to drive factory automation. Manufacturers are under constant pressure to reduce the time it takes to bring new products to market, which requires efficient design processes and rapid prototyping. As products become more sophisticated, the complexity of design increases, necessitating advanced tools and expertise to manage intricate design specifications and integrations. Thus, the knowledge and skills required to incorporate emerging technologies, such as IoT, AI and digital twins, into product designs can be challenging but are essential to staying competitive. OEMs are challenged by the need

to identify and establish capable engineering suppliers that can take ownership of the work, codevelop and coinvest in the domain and technology through a risk-sharing model.

### **The rise of Industrial AI**

The lack of insights into shop floor productivity caused by disconnected systems leads to strained operations and bottlenecks. Thus, there is a need to develop a robust road map to connect manufacturing machines, systems and the workforce to transform them into an Intelligent Industrial Enterprise, which will be led by Industrial AI. Industrial AI uses ML, deep learning and computer vision to analyze large amounts of data generated by industrial equipment and sensors. The output can help manufacturers in areas such as predictive maintenance, quality control, supply chain optimization, energy efficiency and process optimization.

### **Data and GenAI**

Many companies struggle with data silos, making it difficult to leverage valuable insights. Digital transformation and AI integration offer a solution. By harnessing AI and ML, businesses

can enhance CX, optimize operations and develop innovative products. Companies are leveraging these technologies for predictive maintenance and preventive maintenance, among other applications. GenAI tools such as ChatGPT and Midjourney are accelerating product development by streamlining design processes and fostering creativity. Unused data, despite investments in IoT enablement, disparate data sources and technical architecture, along with a lack of visibility into distributed equipment, sites, customers and service personnel, can hamper digital transformation. AI is being used to enhance customer experiences in the aftermarket, optimize internal processes and enable new business models and innovations.

### **OT and cybersecurity**

Cybersecurity, data privacy and OT security are emerging as significant challenges as equipment become more connected and integrated. Manufacturers need to invest heavily in advanced cybersecurity solutions to protect against sophisticated threats, ensure data privacy and comply with global and regional regulations.



In North America, the emphasis is on cybersecurity for critical infrastructure and compliance with data privacy laws. Most OT systems are outdated and lack built-in security features. It is also difficult to monitor and manage OT networks due to their complexity and the diversity of devices involved. Thus, OT security is crucial for safeguarding industrial control systems (ICS) and critical infrastructure. It involves protecting hardware, software and networks that manage physical processes in sectors such as manufacturing, energy and transportation.

### **Supply chain resiliency and transparency**

Industries such as automotive, electronics and pharmaceuticals are heavily impacted by global supply chain disruptions caused by geopolitical tensions, pandemics and natural disasters, making resilience and agility critical yet challenging to achieve. Navigating these challenges requires a delicate balance of advanced technology integration, proactive risk management and adherence to evolving environmental and trade regulations. The complexity of multitier supply chains exacerbates these issues, making it difficult to

achieve transparency and traceability. Building resilient, agile supply chains powered by digital technologies such as AI and ML is becoming a need for manufacturing companies. These technologies can increase supply network visibility and improve control and coordination. The supply chain-as-a-service (SCaaS) model is gaining popularity, allowing companies to outsource parts of their supply chain to specialized providers, which enhances flexibility and scalability.

### **Servitization or new business models**

Traditional manufacturing models are facing challenges due to factors such as chip shortages, inflation and geopolitical tensions. To overcome these obstacles, many companies are adopting a service-oriented model known as servitization. It involves offering services alongside or instead of products. This could include pay-per-use models, subscription services or asset-as-a-service offerings. By embracing *servitization*, manufacturers can adapt to changing market conditions, increase revenue and strengthen their competitive position.

### **Aftermarket services entering the mainstream**

Aftersales servicing, repairs and condition monitoring are manufacturers' key focus areas, which help them maintain assets, drive predictive maintenance and extend the product life cycle. Industries such as aerospace, automotive and electronics face significant challenges in managing aftermarket services, particularly maintaining consistency and quality across global operations. The implementation of circular economy practices, including refurbishment and reverse logistics, is complex and resource intensive. Meeting the growing demand for faster, more personalized aftermarket services is challenging, particularly in the automotive and electronics industries, where customer expectations are high and product complexity is increasing.

### **Sustainability as a competitive advantage**

Industrial technology, especially end-user devices and peripherals, is a major contributor to energy consumption. This has significant implications for businesses aiming to achieve sustainability goals. The convergence of IT and OT and the adoption of digital twins

and connected systems can help optimize energy usage. Circular economy practices, such as recycling and remanufacturing, are gaining traction to minimize waste and resource consumption. North American companies are increasingly focusing on corporate sustainability reporting and green supply chains due to regulatory pressures and investor demands. Global financial institutions are prioritizing sustainability and ESG factors when considering investment opportunities. Companies are investing in robust reverse logistics frameworks, energy-efficient technologies and smart manufacturing solutions to meet these challenges. By integrating sustainability and environmental goals into their operations, businesses can contribute to a more sustainable future.

### **Nearshoring and reshoring**

Manufacturers are increasingly adopting nearshoring and onshoring strategies to bolster supply chain resilience. By sourcing inputs from nearby regions, companies can reduce lead times and mitigate risks associated with global disruptions. This shift is particularly evident in industries such as automotive and



electronics. North American companies are actively reshoring to countries such as Mexico and Canada, as well as Central America, to optimize costs and delivery times. While nearshoring offers several benefits, it can lead to labor shortages in certain regions. To address this challenge and enhance efficiency, manufacturers are leveraging automation, robotics and digital technologies. This strategic move toward nearshoring aligns with the growing trend of regionalizing supply chains and reducing reliance on distant suppliers. By bringing production closer to home markets, companies aim to improve control, visibility and responsiveness in their supply chains.

### **Workforce quality**

The manufacturing industry is facing significant challenges in attracting, retaining, and upskilling talent. The digital transformation of manufacturing necessitates a skilled workforce capable of adapting to new technologies and processes. A major hurdle is the shortage of skilled labor, particularly in North America. This has led to increased reliance on automation and robotics to optimize operations. Additionally, aging workforces pose challenges

as experienced workers retire, leaving a knowledge gap. To address these issues, manufacturers must invest in AI, generative AI (GenAI) technologies, employee training and development programs to upskill their workforce. By fostering a culture of continuous learning and innovation, companies can attract and retain top talent. Additionally, collaboration with technology providers can help implement automation solutions and bridge the skills gap.

**The manufacturing industry is undergoing a significant transformation driven by digital technologies, sustainability and supply chain resilience. Key challenges include talent shortages, rising costs and regulatory complexities. To thrive, manufacturers must embrace digital transformation, prioritize sustainability and focus on workforce development.**




## Provider Positioning

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	Product Design and Development Services	Smart/Digital Factory Solutions	Manufacturing Supply Chain and Procurement Services	Aftermarket Services	Industry Transformation Services
Accenture	Leader	Leader	Leader	Leader	Leader
Akkodis	Leader	Leader	Product Challenger	Rising Star ★	Market Challenger
Bell Techlogix	Not In	Not In	Not In	Not In	Contender
Birlasoft	Contender	Contender	Product Challenger	Market Challenger	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader	Leader	Leader
Cyient	Rising Star ★	Product Challenger	Market Challenger	Product Challenger	Not In
Deloitte	Not In	Leader	Leader	Not In	Leader
eInfochips	Product Challenger	Product Challenger	Not In	Not In	Contender
Eviden (Atos Group)	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger



 Provider Positioning


	Product Design and Development Services	Smart/Digital Factory Solutions	Manufacturing Supply Chain and Procurement Services	Aftermarket Services	Industry Transformation Services
EY	Not In	Not In	Leader	Not In	Leader
FORCAM	Not In	Product Challenger	Not In	Not In	Not In
Genpact	Contender	Contender	Leader	Product Challenger	Product Challenger
Happiest Minds	Contender	Contender	Contender	Contender	Contender
HARMAN	Leader	Leader	Market Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Rising Star ★	Product Challenger	Not In	Not In
Hitachi Digital Services	Product Challenger	Rising Star ★	Product Challenger	Not In	Product Challenger
IBM Consulting	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader



 Provider Positioning

	Product Design and Development Services	Smart/Digital Factory Solutions	Manufacturing Supply Chain and Procurement Services	Aftermarket Services	Industry Transformation Services
ITC Infotech	Product Challenger	Product Challenger	Product Challenger	Contender	Product Challenger
Kyndryl	Market Challenger	Product Challenger	Product Challenger	Market Challenger	Rising Star ★
LTIMindtree	Contender	Product Challenger	Leader	Leader	Product Challenger
LTTS	Leader	Leader	Market Challenger	Not In	Not In
NTT DATA	Leader	Leader	Rising Star ★	Product Challenger	Leader
Perficient	Contender	Contender	Product Challenger	Contender	Product Challenger
PwC	Market Challenger	Product Challenger	Leader	Not In	Market Challenger
Qualitest	Not In	Contender	Contender	Not In	Contender
Quest Global	Product Challenger	Market Challenger	Not In	Contender	Not In
TCS	Leader	Leader	Leader	Leader	Leader



 Provider Positioning

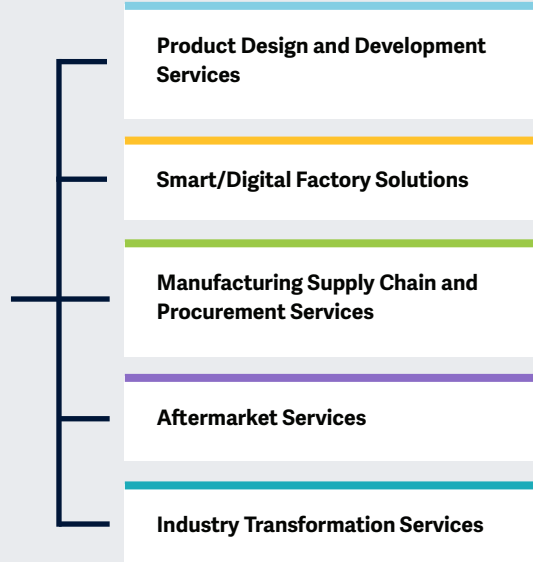
Page 4 of 4

	Product Design and Development Services	Smart/Digital Factory Solutions	Manufacturing Supply Chain and Procurement Services	Aftermarket Services	Industry Transformation Services
Tech Mahindra	Product Challenger	Leader	Leader	Leader	Product Challenger
UST	Product Challenger	Market Challenger	Product Challenger	Product Challenger	Not In
Virtusa	Not In	Contender	Contender	Contender	Not In
Wipro	Leader	Leader	Leader	Leader	Leader
Zensar Technologies	Contender	Contender	Contender	Product Challenger	Product Challenger



This study highlights key industry challenges and assesses **service provider capabilities** to address the unmet needs of enterprise clients.

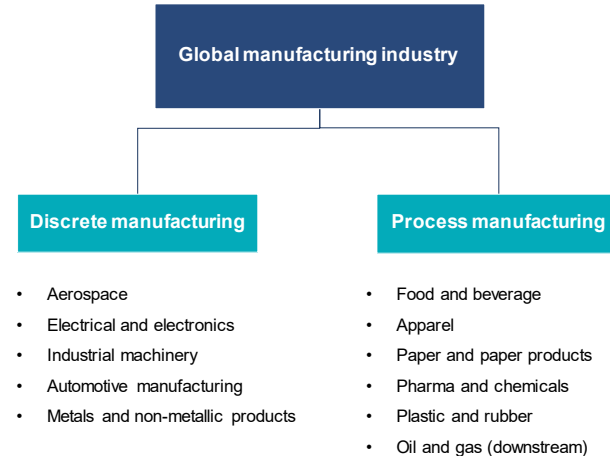
Simplified Illustration Source: ISG 2024



**Definition**

Manufacturing is experiencing unprecedented change driven by factors such as technological advancements, globalization and sustainability concerns. The industry, which includes various sub-industries, can be divided into discrete (distinct and countable) and process (follows a formula) manufacturing.

The manufacturing industry is prioritizing digital transformation, focusing on developing meticulous digital threads to enhance operational efficiency and product quality. This involves linking product information from design through manufacturing to the service lifecycle. Technologies such as digital twins are important for discrete and process manufacturing, enhancing design, optimizing processes and accelerating engineering.



As manufacturing companies pursue digital transformation, product lifecycle management (PLM) will be essential in achieving desired outcomes. PLM supports innovation, the creation of resilient products and supply chains, sustainability practices and the use of data analytics for better decision-making.

The convergence of IT and OT streamlines asset management, helping organizations address operational issues, minimize downtime and optimize resource utilization.

Sustainability is now a paramount consideration for manufacturing leaders, with environmental, social, and governance (ESG) factors crystallizing as board-level imperatives. Manufacturers must foster collaboration throughout the value chain, pinpointing routine operations where ESG strategies can make a difference.

### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Product Design and Development Services, Smart/Digital Factory Solutions, Manufacturing Supply Chain and Procurement Services, Aftermarket Services, Industry Transformation Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on Europe market

This ISG Provider Lens™ study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

### Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).



## ISG's Manufacturing Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Manufacturing industry 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
- Green tiles represent where an ISG Software Research will produce a Buyers Guide in 2025





**Provider Classifications: Quadrant Key**

**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.

**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 products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

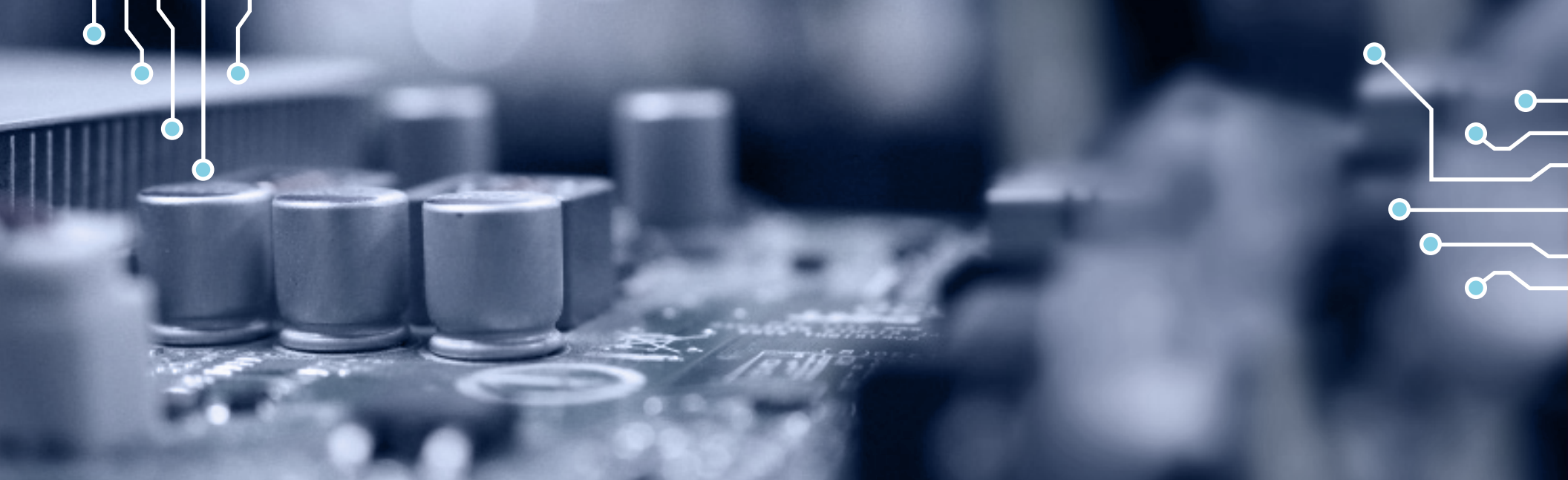
**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative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

**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.

★ **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** means 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.





# Product Design and Development Services

## Product Design and Development Services

### Who Should Read This Section

This report is relevant to manufacturing enterprises in North America that are evaluating product design and development service providers.

In this quadrant, ISG highlights the current competitive positioning of providers offering product design and development services to manufacturing businesses in North America and how each differentiates itself based on the breadth of services and market strength.

The manufacturing market in North America is undergoing notable growth and transformation. Manufacturers are dealing with rapid innovation, cost control and regulatory requirements while maintaining high quality. They are accelerating their time to market to stay competitive, improve real-time data access for operational insights and navigate complex supply chains. They are also facing the challenge of balancing mass customization with efficient production to meet diverse customer needs.

Manufacturing enterprises in the region are heavily investing in digital technologies, particularly AI and ML, to drive product design and innovation. They are looking for providers with industry-specific focus and domain expertise.

Providers are pursuing strategic acquisitions and partnerships to enhance capabilities as enterprises demand complex product development. By acquiring engineering and R&D firms, they strengthen their offerings, while alliances with tech giants and startups grant access to advanced technologies, fueling innovation.



**Operations leaders**, such as COOs and heads of manufacturing, should read this report to gain insights into achieving operational agility for improved production and distribution efficiency.



**Technology leaders**, such as CTOs, should read this report to implement digital tools, analyze their impact on decision-making and understand providers' ecosystems for technology-driven product design.



**Digital leaders**, such as CDOs and CIOs, should read this report to gain insights into data-driven solutions for navigating market dynamics and achieving business goals.



**Designers and product leaders**, such as CPOs, should read this report to explore provider services, product design best practices and the latest technologies and materials in the market.





The quadrant assesses providers offering services to assist manufacturing companies in areas such as **process optimization, design support, material identification, operating condition analysis, PLM and compliance testing.**

Swadhin Pradhan



## Product Design and Development Services

### Definition

This quadrant focuses on solutions that help manufacturing companies with the manufacturing process, design, material identification, determination of operating conditions, quality management and compliance/testing. It elaborates on partnering with OEMs, original design manufacturers (ODMs), semiconductor manufacturers and ISVs to facilitate the design of new products and PoCs. The quadrant also covers PLM, rapid prototyping, adoption of digital twins and software testing.

Product lifecycles are becoming shorter due to changing customer preferences, technological advancements and market demand.

These factors require product design and development companies to be more adaptable and responsive in their strategies to accelerate the development cycle. Additionally, there is a need for effective collaboration among stakeholders across design, engineering, manufacturing and production. Companies should consider using digital twins to create virtual models of physical assets, enabling better monitoring, simulation and analysis.

### Eligibility Criteria

1. **Ability to support product/service combinations**, develop digital business platforms and enhance capabilities for new product/service/business design and development
2. **Experience in innovating digital value offerings** through design thinking, new product/service strategies and market research
3. **Offerings/services** in areas including, but not limited to:
  - \* PLM
  - \* Product strategy
  - \* Product design
  - \* CX design (UI/UX, industrial, service and interaction)
  - \* CRM/product configurator
  - \* Embedded software
  - \* Control systems
  - \* Data management and analytics
  - \* Cybersecurity
  - \* Electronic design automation (EDA)
  - \* Risk and regulatory management
  - \* Quality management
4. **Support for agile, continuous and rapid development**, CI/CD, and continuous testing unit and integration
5. **Expertise in digital technology**, including digital twins, rapid prototyping, autonomous and continuous testing, and quality management through platforms/solutions/testbeds, PLM, and data- and model-driven engineering
6. **Integration of next-gen technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud, AR/VR/MR, additive manufacturing, 3D printing and blockchain
7. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in manufacturing
8. **Referenceable case studies** from key manufacturing industries



## Product Design and Development Services

### Observations

Enterprises continue to adopt digital transformation, AI and ML to drive innovation. Companies are heavily investing in digital technologies, particularly AI and ML, to drive product design and innovation, including leveraging AI for rapid prototyping, optimization and personalized experiences. Providers are also looking at strategic acquisitions and partnerships to build their capabilities as demand from enterprises for product development continues to become complex. Many companies are acquiring engineering and R&D firms to strengthen their capabilities and expand their service offerings. Partnerships with technology giants and startups enable providers to access modern technologies and accelerate innovation.

With product lifecycles becoming shorter, enterprises are seeking providers with end-to-end PLM capabilities. Companies are offering comprehensive PLM solutions, covering the entire product journey from ideation to market launch, including services such as product design, engineering, manufacturing and

after-sales support. Providers are working with leading platform companies such as Siemens, PTC, Dassault Systèmes, Rockwell Automation and Schneider Electric.

Providers with industry-specific focus and domain expertise are gaining competitive advantage as they better match business challenges with technology. Companies are specializing in specific industries, such as automotive, aerospace, semiconductors and medical devices, to develop deep domain expertise and tailored solutions. This specialization enables them to understand each industry's unique challenges and opportunities and deliver innovative solutions.

From the 100 companies assessed for this study, 28 qualified for this quadrant, with 12 Leaders and one Rising Star.

### accenture

**Accenture's** Industry X division helps clients digitize R&D and engineering, design smart products and deliver personalized experiences. Leveraging cloud, data, AI and ML, it partners with technology companies to innovate and acquire advanced design capabilities.

### AKKODIS

**Akkodis** leverages AI and ML to drive product design and innovation. Its SMART-TIDE framework enables rapid prototyping and optimization. With a focus on industries such as automotive, aerospace and medical devices, Akkodis offers a comprehensive design and engineering services portfolio.

### Capgemini

**Capgemini's** engineering business specializes in product design and development, leveraging AI, ML and IoT to drive innovation. Its strong consulting capabilities and engineering expertise assist clients in ideating, designing and engineering products.

### cognizant

**Cognizant** has strengthened its engineering and R&D capabilities in manufacturing through the acquisitions of Belcan and Mobica. Leveraging its consulting expertise and innovation labs, the company offers end-to-end solutions in smart product engineering.



## Product Design and Development Services



**HARMAN**, with its global footprint and in-house design agency Huemen, offers end-to-end product engineering services. Leveraging its strategic partnerships with Samsung and other tech giants, HARMAN accelerates innovation and delivers advanced solutions.

### HCLTech

**HCLTech** offers comprehensive product design and development services covering software, hardware and mechanical engineering. With dedicated labs and CoEs in areas such as AI, 5G and Industry 4.0, HCLTech drives innovation and accelerates product development.



**IBM** Consulting is expanding its product design and development capabilities by leveraging digital technologies and AI. With acquisitions

like Dialexa and a strong focus on digital products, IBM offers end-to-end solutions from ideation to market launch.



**Infosys** has significantly strengthened its design, engineering and R&D capabilities through strategic acquisitions, such as InSemi Technology and Intech. With a strong focus on consulting and engineering services, Infosys offers comprehensive PLM solutions across various industries.

### LTTTS

**LTTTS** offers end-to-end solutions from chip to cloud, excelling in IIoT. With strong industry and academic partnerships, it provides comprehensive product design and development services across the entire product development life cycle (PDLC), leveraging advanced technologies such as AI, GenAI and digital twin.

### NTT DATA

**NTT DATA**, with over 20,000 full-time employees (FTEs) and a strong presence in the automotive industry, delivers comprehensive product design and development solutions. It leverages its partnership with Microsoft and Blackberry QNX to drive innovation in areas such as connected cars and product design.



**TCS'** strong focus on the automotive and aerospace industries, coupled with its dedicated CoEs and Smart Mobility Group, enables it to deliver advanced solutions. Leveraging IoT, AI and its Cognix™ suite, TCS accelerates digital transformation and drives innovation.



**Wipro** offers product design and development services, including software-defined vehicles, VLSI design and industry 4.0 solutions. With a strong focus on PLM, EDA and additive manufacturing, Wipro leverages its in-house expertise and partnerships to deliver novel solutions.

### CYIENT

**Cyient (Rising Star)**, with its deep engineering expertise and focus on digital ER&D, offers comprehensive product design and development solutions. Leveraging its strong domain knowledge in industries like aerospace and automotive, Cyient applies design thinking to drive innovation.



# HCLTech



“HCLTech leverages deep domain experience and its global partner network to provide consulting, system integration services and managed services in the product design and development space, delivered on industry-leading engineering platforms.”

Swadhin Pradhan

## Overview

HCLTech is headquartered in Noida, India. It has more than 227,500 employees across over 215 delivery centers worldwide. In FY24 the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. The company's Industry NeXT portfolio, which includes a framework for Industry 4.0, helps connect its digital capabilities to client business challenges. HCLTech works with customers across product life cycles, from product conceptualization to product design and development, and from product support and sustenance to program management of specific processes such as release management and test automation.

## Strengths

**Comprehensive product portfolio:** HCLTech, with its deep engineering heritage and capabilities, provides end-to-end product design and development solutions. The company offers a comprehensive range of product engineering services, including software, mechanical, hardware, VLSI design, industrial design and value engineering. It also helps customers in New Product Development Initiatives (NPDI) and reengineering their products.

**Dedicated labs and CoEs:** HCLTech has many dedicated labs and CoEs that focus on various technologies, tools and accelerators. Some labs specialize in industrial design, extended reality (XR) innovation, 5G, AI and Industry 4.0. The CoEs include the STRIDE CoE (Design and Innovation Center of

Excellence), which also focuses on additive manufacturing or 3D printing, and a CoE for control systems. In addition, the company has deep capabilities in embedded design services.

**Platform compatibility:** HCLTech's product design solutions leverages long standing relationships with various platforms such as Siemens, PTC, SAP, Dassault Systèmes, Selerant, Aaras and all hyperscalers. It also has a strong partner ecosystem, including OEMs, ODMs and platform vendors. Its embedded design services partner ecosystem includes Intellectual Property vendors, such as ARM, Synopsys and Cadence, foundries, and packaging and testing vendors, such as TSMC, Samsung, IBM and GlobalFoundries.

## Caution

With its deep capabilities in embedded design services, HCLTech can benefit from the resurgence of the semiconductors industry in North America and further expand its client portfolio, which continues to be dominated by large enterprises.



# Smart/Digital Factory Solutions

### Who Should Read This Section

This report is relevant to manufacturing enterprises in North America that are evaluating smart/digital factory service providers.

In this quadrant, ISG highlights smart/digital factory service providers' current market positioning in North America and how they address the key challenges faced by enterprises in the region.

Manufacturing enterprises in North America are encountering significant challenges as they transition to smart/digital factories. The most pressing issue is the lack of real-time visibility into machine performance and production processes, which hampers operational efficiency. High capital investments required for digitalization, resistance to organizational change and the complexities of integrating legacy systems with modern digital technologies further complicate the transition. Moreover, evolving ESG regulations

push companies toward more sustainable practices, adding to the pressures of digital transformation.

Manufacturers are seeking comprehensive support from providers that offer technology solutions, streamline operations, reduce costs and ensure regulatory compliance. They demand end-to-end solutions that provide real-time visibility and predictive maintenance to reduce downtime and boost productivity. They need scalable systems that can integrate with existing technologies and help manage organizational change, including workforce training and upskilling for digital operations.

Providers are offering comprehensive smart/digital factory solutions that incorporate AI, IoT and predictive analytics to boost visibility and operational productivity. They are simplifying the integration of legacy systems, lowering initial costs, supporting clients in meeting ESG goals, and assisting in workforce adaptation.



**Digital leaders**, such as CDOs and CIOs, should read this report to drive digital transformation and leverage data-driven solutions to align with market changes and meet business goals.



**Technology leaders**, such as CTOs and innovation heads, should read this report to assess the impact of technologies such as AI and automation in digital factories for strategic investment decisions.



**Operations leaders**, such as COOs and heads of manufacturing, should read this report to implement operational agility to produce and distribute manufactured products to the market efficiently.





The quadrant assesses providers specializing in services that help manufacturing companies **streamline factory or shop floor operations**, encompassing offerings such as manufacturing execution systems (MES) and process and quality management solutions.

Swadhin Pradhan



## Smart/Digital Factory Solutions

### Definition

This quadrant focuses on solutions that help manufacturing companies drive their digital transformation journey, including asset management, manufacturing execution systems (MES) and quality management. It also covers solutions that facilitate Industry 4.0 concepts, virtual factories and model plants. These solutions leverage technologies such as 5G, robotics, AI, digital twins, cybersecurity, IoT, computer vision and edge computing to optimize shop floor or factory operations. Smart manufacturing solutions help companies improve efficiency, manage costs, make better and faster decisions, monitor production performance and predict maintenance.

Digital or smart manufacturing solutions help companies implement their strategies from the boardroom to the shop floor. As manufacturing companies navigate challenges such as obsolete networks and infrastructure, disjointed OT and IT layers, data silos, and lack of collaboration between IT and operations, a clear smart manufacturing strategy can streamline shop floor operations.

### Eligibility Criteria

1. Ability to **drive stakeholder engagement and analyze data**, leveraging OT and IT expertise
2. **Application of best practices and solutions** in various manufacturing industries
3. Provision of examples that **align supply chain and factory operations** with clients' smart manufacturing initiatives to drive operational agility
4. **Offerings/services in areas including** but not limited to:
  - \* Manufacturing operations management (MOM) systems
  - \* Fulfillment execution systems
  - \* Shop floor incident reporting systems
  - \* Shop floor analytics
  - \* Predictive maintenance
  - \* Connected assets
  - \* Asset performance management
  - \* Private 5G networks
  - \* Remaining useful life estimation
  - \* Failure impact prediction
  - \* OT cybersecurity services
5. **Integration of next-gen technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud, AR/VR/MR, additive manufacturing, 3D printing and blockchain
6. **Strong partnerships with industry associations**, regulatory bodies, technology and OT firms, and startups specializing in manufacturing
7. **Referenceable case studies** from key manufacturing industries



## Smart/Digital Factory Solutions

### Observations

This quadrant features a mix of large and midsize service providers and niche players or pure-play engineering firms dedicated to digital factory solutions. Technology convergence is key for both manufacturing companies and providers. Manufacturers and providers are leveraging a combination of technologies, including digital twins, AI, IoT, cloud and data analytics, to drive smart manufacturing or factory solutions. These technologies work together to improve efficiency, optimize processes and gain real-time insights.

Collaboration with leading technology providers, such as PTC, Siemens, AWS and Microsoft, is crucial for offering comprehensive solutions and keeping pace with advancements. It allows companies to access advanced technologies and integrate them seamlessly into their offerings.

It is essential to have deep industry expertise and consulting capabilities as manufacturers seek partners that possess in-depth industry knowledge of specific manufacturing challenges. This understanding is vital for

developing tailored solutions. Companies such as Accenture, Akkodis and Deloitte emphasize their consulting services to guide clients through their digital transformation journeys.

Some providers are also focusing on specific areas within the smart manufacturing space rather than providing a broad range of solutions. For example, Capgemini emphasizes PLM and digital customer services, while HARMAN leverages accelerators such as IoT-in-a-Box. This specialization allows it to cater to specific client needs.

From the 100 companies assessed for this study, 33 qualified for this quadrant, with 14 Leaders and two Rising Stars.

### accenture

**Accenture's** Industry X practice leverages technology, strategy and operations to drive smart manufacturing solutions. Collaborating with partners like PTC, Siemens and others, Accenture helps clients achieve faster value through digital transformation.

### AKKODIS

**Akkodis** offers comprehensive digital manufacturing solutions, leveraging technologies such as digital twins, AI and IoT. With deep industry expertise and strong client relationships, Akkodis helps manufacturers transform their operations through consulting and advisory services.

### Capgemini

**Capgemini** offers digital transformation solutions for manufacturing, leveraging its engineering and IT expertise. With a focus on smart factories, PLM and digital customer services, Capgemini partners with leading technology providers to deliver innovative solutions.

### cognizant

**Cognizant**, with a focus on digital engineering, cloud, data and IoT, offers solutions such as OnePlant™, APEx and Digital Twin. Through partnerships with AWS, Microsoft and others, Cognizant aims to accelerate its growth in the smart manufacturing space.



## Smart/Digital Factory Solutions

### Deloitte.

**Deloitte** leverages its deep industry expertise to provide comprehensive smart manufacturing solutions. With a global network of innovation centers and partnerships with leading technology providers, it helps manufacturers improve operational efficiency and resilience.



**HARMAN** offers unique accelerators, such as IoT-in-a-Box, to drive digital manufacturing. Leveraging Samsung's engineering heritage and partnerships with AWS, Microsoft and others, HARMAN provides a comprehensive manufacturing execution system (MES), manufacturing operations management (MOM) and IoT solutions, as well as smart factory assessments.

### HCLTech

**HCLTech** offers a comprehensive suite of digital manufacturing solutions, leveraging its strong capabilities in engineering, IT and OT. With a focus on IoT, AI and automation, HCLTech helps manufacturers improve efficiency, productivity and quality.



**IBM Consulting** leverages its combined technology and consulting expertise to offer a comprehensive suite of digital factory solutions. With a strong understanding of manufacturing processes, IBM provides solutions like SiView MES and Watsonx.ai.

### Infosys®

**Infosys** leverages its strong IT capabilities and industry expertise to provide comprehensive digital manufacturing solutions. With a templated approach and partnerships with leading technology providers, Infosys helps manufacturers accelerate their Industry 4.0 journeys.

### LTTS

**LTTS** offers a comprehensive digital manufacturing solutions portfolio, including consulting, IT and OT integration, MES, MOM and predictive maintenance. The company helps clients drive plant sustenance, manage CapEx and OpEx and accelerate their transformation journeys.

### NTT DATA

**NTT DATA** leverages strong engineering, Industry 4.0 solutions and a consulting-led approach to offer smart manufacturing solutions. Strategic partnerships with industry leaders and tech giants, coupled with investments in startups, enhance its capabilities.



**TCS** offers IT and OT integration solutions for the manufacturing industry. Its Neural Manufacturing Lab drives the factory of the future concept. TCS' connect plant capabilities and intellectual properties power its smart manufacturing practice.



## Smart/Digital Factory Solutions



**Tech Mahindra's** smart manufacturing solutions focus on the factory of the future, encompassing connected shopfloor, automation, analytics and energy management. Dedicated labs in AR, VR, AI, analytics and digital twin enable close client collaboration and innovation.



**Wipro** offers a comprehensive smart manufacturing suite with platforms such as Process-in-a-Box and OTNxTTM, alongside CoEs for various technologies. Partnerships with industry leaders and acquisitions bolster its capabilities in automation, robotics and digital manufacturing.

## HEXAWARE

**Hexaware (Rising Star)** offers connected manufacturing solutions using technologies such as 5G, AI and digital twins. Its strong client base and partnerships with industry leaders, such as SAP, Oracle and AWS, drive its GTM strategy and innovation in the manufacturing space.

## Hitachi Digital Services

**Hitachi Digital Services (Rising Star)** offers IoT-led smart manufacturing solutions under its Hitachi Digital Factory solution. Leveraging its deep industry expertise and global lighthouse network, the company provides scalable and reusable solutions.



# HCLTech



“HCLTech continues to strengthen its offerings around IT, OT, digital manufacturing and plant engineering to consolidate over two decades of experience in MES and plant automation solutions.”

Swadhin Pradhan

## Overview

HCLTech is headquartered in Noida, India. It has more than 227,500 employees across over 215 delivery centers worldwide. In FY24 the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech’s digital manufacturing services cater to smart factory needs across functions, from engineering to shop floor planning, execution, quality and factory logistics. The company’s portfolio of Industry NeXT solutions, along with its framework for Industry 4.0, is driving its digital capabilities for manufacturing clients.

## Strengths

**Strong capabilities across the manufacturing value chain:** HCLTech has over two decades of experience in areas such as manufacturing engineering, asset and plant maintenance, MES and plant automation solutions. Its capabilities span consulting, IT-OT-ET integrations, machine integration, controllers, supervisory control and data acquisition (SCADA), and human-machine interface (HMI). It also leverages its accelerators and frameworks, such as plant-in-a-box, for multisite rollouts, assets and assessment toolkits.

**Leveraging key service lines:** HCLTech leverages its key business lines, such as digital business services, digital foundation services, engineering and R&D services and HCL Software, to drive its manufacturing

capabilities. It has acquired ASAP and Starschema to strengthen its expertise in data engineering and consulting for automotive and other manufacturing clients. As part of its focus on IoT, it has a separate practice group for IoT-based solutions.

**Comprehensive partner network:** HCLTech’s partner network spans every component of digital manufacturing. From an enterprise systems perspective, it has partnerships with SAP, Oracle, PTC, Dassault Systèmes and Siemens. For MES/QMS/APS/LIMS, it partners with Aveva, Critical Manufacturing, Honeywell and many other software providers. It also partners with all leading hyperscalers.

## Caution

With AI becoming a key component in various solutions within the smart manufacturing space, HCLTech should leverage its engineering capabilities and IoT CoLLab to drive solution development and expansion. It should also showcase its range of commercial constructs along with outcome-based contracts to help clients.





# Manufacturing Supply Chain and Procurement Services

### Who Should Read This Section

This report is relevant to manufacturing enterprises in North America that are evaluating manufacturing supply chain and procurement service providers.

In this quadrant, ISG highlights the current market positioning of manufacturing supply chain and procurement service providers in North America and how they address the key challenges faced by enterprises in the region.

North America's manufacturing industry is experiencing challenges such as rising costs, geopolitical disruptions and labor shortages. To enhance resilience, manufacturers are diversifying supply chains and reducing reliance on single sources. The shift to Industry 4.0 is complex, necessitating substantial investment in digital technologies and skilled talent. To navigate these obstacles, manufacturers are turning to IT service providers for comprehensive solutions that utilize advanced technologies such as AI, IoT, and automation to enhance visibility and risk management across supply chain ecosystems.

Enterprises in the region are seeking providers that can drive digital transformation, automate supply chain processes and implement advanced technologies such as generative AI, ML and blockchain. These innovations optimize inventory management, improve demand forecasting and streamline logistics. The growing focus on interconnected supply chains is fueling the demand for collaboration platforms for better communication and resource sharing among stakeholders.

IT providers are offering cloud-based supply chain management, advanced analytics, real-time IoT tracking and AI-driven optimization. They are also forming strategic partnerships to enhance efficiency, reduce costs and support manufacturers in their transition to Industry 4.0.



**Digital leaders**, such as CDOs and CIOs, should read this report to streamline processes through effective automation of key supply chain and procurement components.



**Supply chain leaders**, such as CSOs and CPOs, should read this report to understand supply chain complexities, integrate supply chain and procurement functions, and enhance operational visibility.

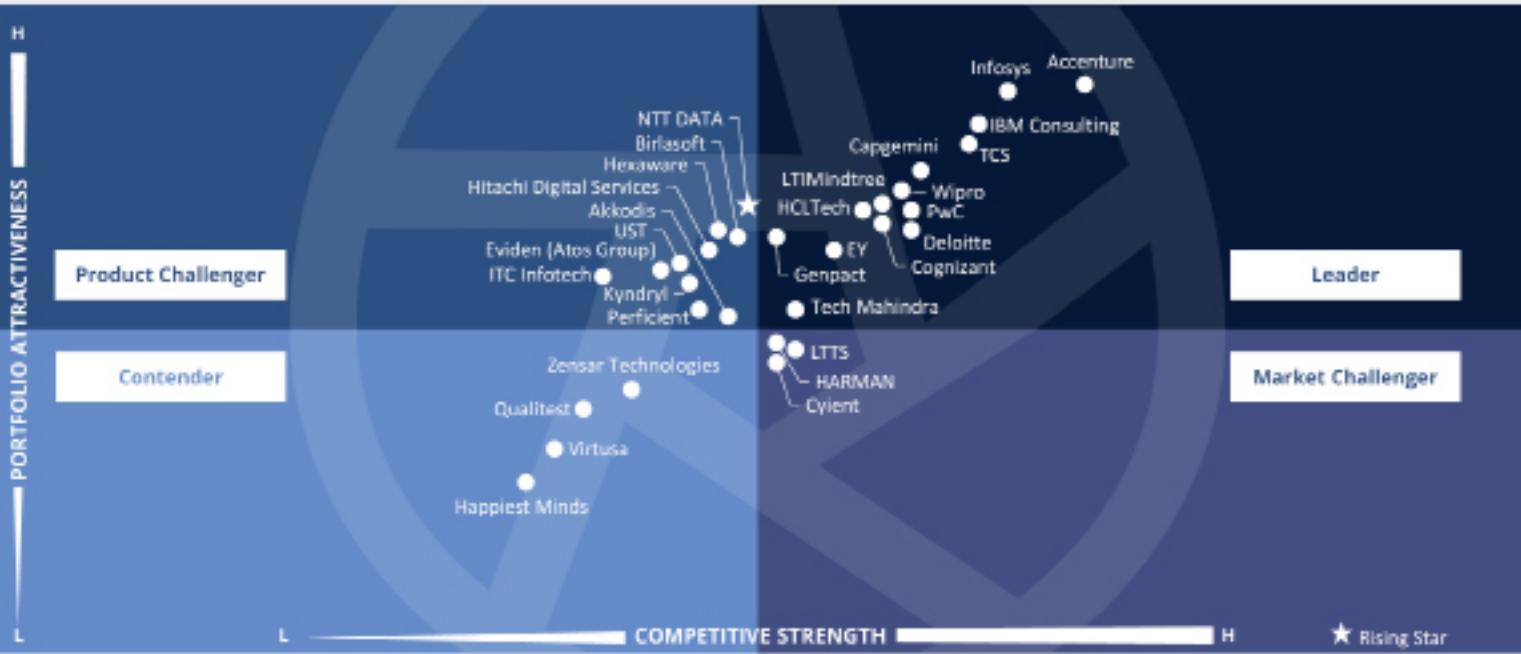


**Technology leaders**, such as CTOs and innovation heads, should read this report to assess supply chain providers and their use of IoT and cloud technologies for enhanced supply chain resilience.



**Manufacturing Industry Services and Solutions**  
**Manufacturing Supply Chain and Procurement Services**

North America 2024



The quadrant assesses providers that offer services for managing functions such as procurement, warehousing, inventory management, fulfillment, transportation and logistics, **aiming to enhance resilience and cost management.**

Swadhin Pradhan



## Manufacturing Supply Chain and Procurement Services

### Definition

This quadrant focuses on solutions that help companies manage procurement, warehousing, inventory, fulfillment and transportation/logistics. Other solutions may include managing supplier relationships, contracting, and material and order management. These solutions use technologies such as blockchain to expand companies' capabilities. Many manufacturing organizations also increasingly invest in automation, AI/GenAI, intelligent workflows, partner ecosystems and sustainability to optimize supply chain operations.

Supply chain disruptions continue to trouble manufacturers, impacting production and inventory. Manufacturers are increasingly prioritizing automation in supply chain and procurement processes. Additionally, reliability and sustainability have emerged as critical requirements alongside security concerns. The increase in attacks on OT is prompting more discussions around OT security.

### Eligibility Criteria

1. Expertise in **providing IT and business strategy** and consulting services to help companies reduce supply chain complexities, either independently or through partners
2. Proficiency in **defining the roadmaps** and helping with the design, implementation and maintenance of IT systems, as well as managing back-office processes
3. **Offerings/services in areas** including, but not limited to:
  - \* 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
4. **Integration of next-gen technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud, AR/VR/MR and blockchain
5. **Strong partnerships with industry associations**, regulatory bodies, technology firms and startups specializing in manufacturing
6. **Referenceable case studies** from key manufacturing industries



## Manufacturing Supply Chain and Procurement Services

### Observations

Vulnerabilities in the supply chain, including supplier networks, are leading to cybersecurity and other issues, such as supply chain visibility and resiliency, as organizations move toward connecting devices and equipment to drive faster decision-making. This situation has led manufacturers to invest heavily in digital technologies, particularly AI and ML, to drive supply chain innovation and digital transformation. These technologies are used to improve forecasting accuracy, optimize inventory levels, enhance visibility and automate processes.

Many companies offer comprehensive supply chain solutions that cover the entire value chain, from sourcing and procurement to logistics and fulfillment. This end-to-end approach enables manufacturing clients to optimize their operations and reduce costs.

To offer end-to-end solutions, providers are forging strategic partnerships and looking at targeted acquisitions. Companies are partnering with leading technology providers and acquiring specialized firms to enhance

their capabilities. This approach allows them to access advanced technologies and expand their service offerings.

A growing focus on sustainability and risk management is evident in supply chain strategies. Companies are incorporating ESG factors into their operations and developing robust risk management frameworks to mitigate disruptions and ensure business continuity.

As focus on sustainability and responsible sourcing gains prominence, manufacturing companies and service providers are collaborating in reverse logistics, digital tools and data analytics to manage the long-term sustainability goals for their supply chains.

From the 100 companies assessed for this study, 31 qualified for this quadrant, with 14 Leaders and one Rising Star.

### accenture

**Accenture** offers robust supply chain services powered by AI and cloud. Its focus on sustainability-led supply chains and global delivery network helps clients minimize risks, improve visibility and adapt to disruptions.

### Capgemini

**Capgemini** offers focused supply chain strategy and consulting services. It leverages its intelligent operations portfolio, research strengths and vendor partnerships to drive supply chain and procurement solutions.

### cognizant

**Cognizant** offers comprehensive supply chain solutions, including integrated planning, sourcing, procurement, fulfillment and smart manufacturing. With deep industry expertise and acquisitions, Cognizant strengthens its source-to-build capabilities.

### Deloitte.

**Deloitte** offers solutions focused on supply chain process development, risk management and design. Deloitte builds and expands digital supply chain solutions through partnerships with leading technology firms and universities.



## Manufacturing Supply Chain and Procurement Services

EY

**EY** offers strong risk management and transformation consulting services for supply chains. It leverages EY-Parthenon for ESG and risk consulting and guides clients on digital transformation using AI, blockchain and predictive analytics.



**Genpact** offers comprehensive supply chain services across the manufacturing value chain, covering sourcing, procurement and logistics. With deep expertise and a large team of supply chain management (SCM) consultants, Genpact delivers end-to-end supply chain and procurement solutions.

HCLTech

**HCLTech** offers focused supply chain and procurement solutions in areas such as planning, execution, visibility and inventory optimization. Leveraging frameworks such as iVISION, HCLTech drives digital engineering and IoT-based supply chain offerings.



**IBM Consulting** integrates IBM technology, ecosystem partners and its proprietary software packages to deliver end-to-end supply chain solutions. It offers a comprehensive suite of AI-powered supply chain solutions, including the IBM Supply Chain Intelligence Suite.

Infosys

**Infosys** offers AI- and ML-powered supply chain solutions, leveraging its Intellectual Properties (IPs) such as Infosys Intelligent Sourcing. Strong partnerships with leading supply chain software firms, combined with expertise from Infosys BPM, enable Infosys to deliver comprehensive supply chain solutions.



**LTIMindtree** leverages AI, ML, IoT and big data analytics to deliver digitally enabled supply chain solutions. Its solutions focus on areas such as risk sensing, shipping cost optimization and warehouse automation. Platforms like Fosfor and partnerships power its solutions.



**PwC** offers supply chain and procurement solutions leveraging digital assets and point solutions. It has strong partnerships with Oracle and SAP and leverages cross-firm expertise in technology, tax, advisory, consulting and managed services.



**TCS** offers a comprehensive range of supply chain solutions, focusing on planning, inventory, order, warehouse and logistics management. With an emphasis on intelligent and resilient supply chains, TCS leverages its ResiliT suite and AI-powered tools to address risks.



## Manufacturing Supply Chain and Procurement Services

### Tech Mahindra

**Tech Mahindra** offers end-to-end supply chain solutions, including control towers, supply chain consulting and smart contracts. Tech Mahindra delivers scalable and efficient solutions for manufacturing industries by leveraging deep industry expertise and internal Intellectual Properties (IPs).



**Wipro**, with a strong presence in the manufacturing industry, offers end-to-end supply chain solutions. With a focus on AI, IoT and blockchain, Wipro aims to drive digital transformation in supply chain operations.

### NTT DATA

**NTT DATA (Rising Star)**, with its strong manufacturing business, offers a wide range of supply chain consulting services. Leveraging deep industry expertise and advanced analytics, NTT DATA helps clients design, plan and optimize their supply chains.





“HCLTech’s deep industry and domain expertise drive its manufacturing supply chain and procurement offerings, helping companies tackle supply chain challenges.”

Swadhin Pradhan

# HCLTech

## Overview

HCLTech is headquartered in Noida, India. It has more than 227,500 employees across over 215 delivery centers worldwide. In FY24 the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech has been offering manufacturing services for the last two decades, delivering business value for clients. HCLTech is also incorporating cognitive features into its manufacturing and supply chain capabilities, which are part of HCLTech’s Supply Chain NeXT. The company has developed many Internet Protocols (Ips) and accelerators for supply chain, logistics and distribution.

## Strengths

### Focused solutions and capabilities:

HCLTech’s key focus areas in the supply chain and procurement space include planning, simulation, execution, visibility across the extended enterprise, inventory optimization, omnichannel integration and order orchestration. The company also has many frameworks, some of which include iVISION TOUCHSTONE, the iSCM opportunity assessment framework and supply intelligence monitor. HCLTech leverages its digital engineering software capabilities to drive supply chain offerings around IoT, assets and digital twins.

**Robust partner ecosystem:** HCLTech partners with key supply chain players such as SAP, IBM, Blue Yonder, Kinaxis and Anaplan around its focus areas and

transformation themes. It has also launched vertical-specific solutions alongside platform companies. Solutions developed with hyperscalers focus on data and insight platforms, as well as field force automation.

### Solutions infused with new-age

**technologies:** HCLTech has used GenAI to build a demand forecasting tool using Google Gemini AI to help companies make informed decisions. Its portfolio of supply chain procurement solutions encompasses a combination of proprietary and partner capabilities, driven by a focus on providing technological excellence. The company’s supply chain solutions include solutions based on digital twins and sustainability.

## Caution

HCLTech should integrate its intellectual property (IP), partner solutions, and investment in software products to provide an end-to-end solution portfolio. It should leverage its consulting and transformation capabilities as a differentiator for various value-added services.





# Aftermarket Services

### Who Should Read This Section

This report is relevant to manufacturing enterprises in North America that are evaluating aftermarket service providers.

In this quadrant, ISG highlights the current market positioning of providers offering aftermarket services to manufacturing enterprises in North America and how each addresses the key challenges faced in the region.

Enterprises in North America are prioritizing aftermarket services to boost customer satisfaction and revenue. Manufacturers are adapting their business models to include maintenance, repair and digital services with traditional products, driven by rising customer expectations for long-term support and SLAs. Technology advances, such as predictive maintenance, enable proactive service and reduced downtime. As such, outcome-based and as-a-service models are gaining traction.

Enterprises are increasingly prioritizing partnerships with service providers to develop transformative business models that incorporate technologies such as AI and RPA. This approach seeks to optimize operational performance and establish an effective feedback loop for product improvements. As a result, these enterprises evaluate providers' capabilities in delivering integrated solutions, strategic portfolios and a strong, reliable partner ecosystem.

Providers are focusing on solutions that assist manufacturing clients with supply chain and parts management, improve CX, and incorporate advanced technologies, enabling a seamless shift from legacy systems and processes to modern, cloud-based solutions.



**Marketing and sales leaders**, such as CMOs, should read this report to gain insights into market trends and consumer behavior and to reevaluate their aftermarket service models to enhance CX.

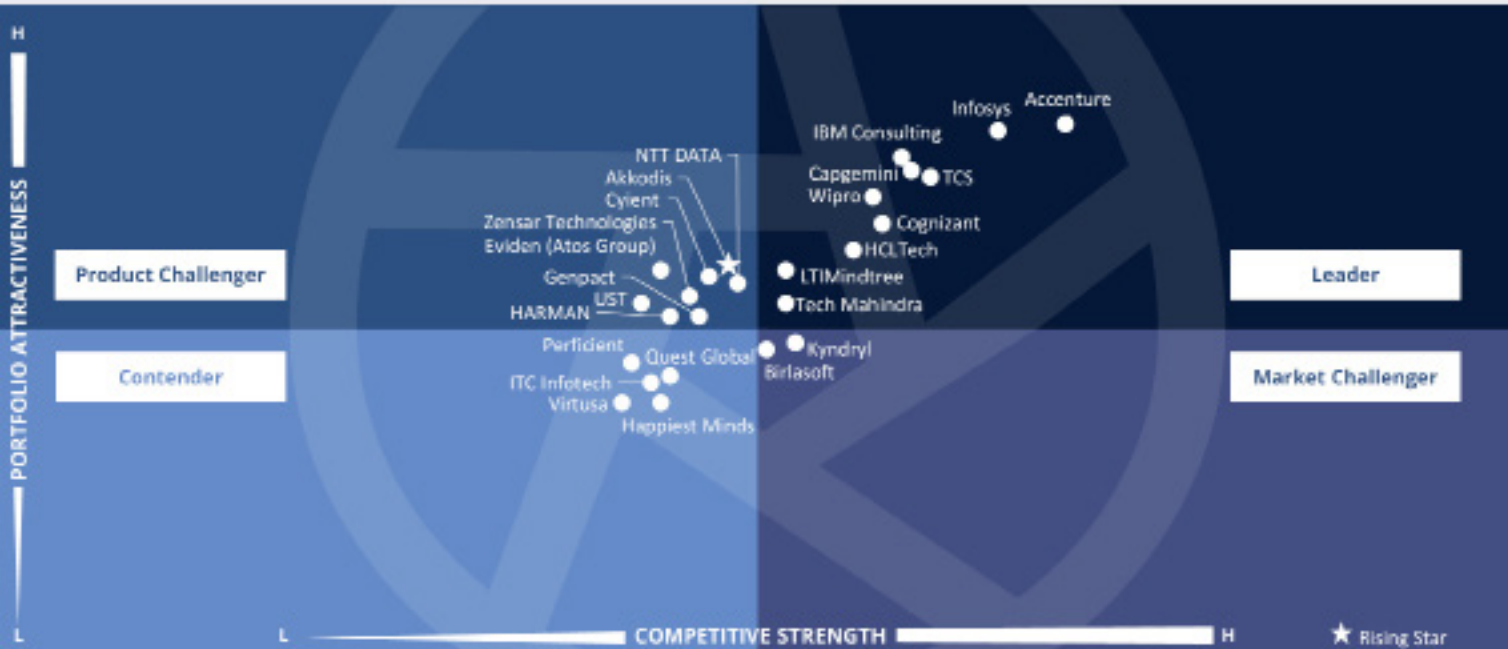


**Research and innovation leaders**, such as innovation and production heads, should read this report to understand provider capabilities in data integration, product enhancements and after-sales support.



**Technology leaders**, such as CTOs, should read this report to drive modernization by implementing cloud-based solutions to analyze the capabilities of tools such as AI to maintain the feedback loop for product enhancements.





The quadrant assesses providers with expertise in selling and delivering **maintenance services, spare parts, end-of-life services and field services management**. These providers aim to enhance margins and CSAT for manufacturing companies.

Swadhin Pradhan



## Aftermarket Services

### Definition

This quadrant includes solutions and services that help manufacturers offer a wide range of offerings beyond finished goods, whether standalone or bundled. These offerings include spare parts, software, field operations, end-of-life services, and warranty and guarantee services. The solutions also focus on digitalizing various aftermarket activities by leveraging AI and RPA, helping companies maintain the feedback loop for product enhancements. With rapid technological advancements, the manufacturing industry is experiencing the rise of new business models, such as service lifecycle management and subscription services.

Manufacturing companies 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 user and customer experiences across online and mobile channels.

### Eligibility Criteria

1. **Provision of examples of work** with various manufacturing industries to design aftermarket solutions
2. **Ability to define key metrics** that help companies align with business outcomes
3. **Offerings/services in areas** including, but not limited to:
  - \* Controls management
  - \* Warranty management
  - \* Analytics and reporting
  - \* Field management services
  - \* Inventory optimization
4. Expertise in **applying next-gen technologies**, including automation, analytics, IoT, AI/GenAI, cybersecurity, cloud, AR/VR/MR, 3D printing and blockchain
  - \* Spare parts and sales network optimization
  - \* Pricing management
  - \* Contract management
  - \* CX/UX
  - \* Service information systems
  - \* Remote troubleshooting tools
  - \* PLM services
  - \* Reverse logistics
5. **Ability to demonstrate strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in manufacturing
6. **Referenceable case studies** from key manufacturing industries



## Aftermarket Services

### Observations

Manufacturing companies are constantly looking to innovate around new business models to discover new avenues for revenue growth. These innovations are driven by AI and digital technologies. Many companies, including Accenture, IBM Consulting, LTIMindtree and TCS, are leveraging AI, IoT and other digital technologies to enhance aftermarket services. These technologies include applications such as AI-powered dealer transformation, intelligent voice assistants and field mechanic bots. These technologies help improve efficiency, reduce costs and enhance CX.

Companies such as Capgemini, IBM Consulting and Cognizant are forming strategic partnerships with leading software players, such as SAP and Salesforce, and making strategic acquisitions to strengthen their aftermarket capabilities. These partnerships and acquisitions enable them to access new technologies, expand their service offerings and deliver comprehensive and innovative solutions to their clients.

The leading providers in this quadrant focus on solutions that assist manufacturing clients with supply chain and parts management, enhance CX and adopt the latest technologies to transition from legacy systems and processes to modern cloud-based solutions. As such, outcome-based and as-a-service models are gaining traction. Companies such as HCLTech and Accenture are focusing on outcome-based and as-a-service models for aftermarket services. This approach allows clients to pay for specific outcomes rather than traditional time-and-materials contracts. It also enables companies to explore new revenue streams and align their services closely with client business objectives.

From the 100 companies assessed for this study, 25 qualified for this quadrant, with 10 Leaders and one Rising Star.

### accenture

**Accenture's** Product-as-a-Service Enablement solution portfolio helps companies improve product reliability, reduce costs and enhance resiliency through innovative as-a-service models, leveraging AI, cloud, analytics and strategic partnerships.

### Capgemini

**Capgemini** offers a comprehensive suite of aftermarket CRM and CX solutions, including warranty and parts management, and BPO. It leverages its design expertise and partners with leading software players (SAP and Salesforce) to deliver intelligent after-sales solutions.

### cognizant

**Cognizant** offers comprehensive aftermarket solutions, focusing on CX, service requests, field services and warranty management. With deep CRM expertise and recent acquisitions, Cognizant drives digital transformation and enhances customer engagement.

### HCLTech

**HCLTech** offers outcome-based aftermarket services to drive growth and reduce operational costs. It focuses on proactive maintenance and optimized parts supply. By leveraging AI, IoT and partnerships, it helps clients explore new revenue streams through as-a-service models.



## Aftermarket Services



**IBM Consulting** leverages AI, blockchain, IoT and 5G to drive intelligent workflows. By partnering with Salesforce and leading industry players, such as SAP, IBM delivers transformative solutions, such as AI-powered dealer transformation and streamlined warranty claim processes.



**Infosys** offers comprehensive aftermarket solutions covering warranty, service parts and maintenance, repair and overhaul (MRO) inventory management. With a strong talent pool and investments in emerging technologies, Infosys empowers clients to optimize aftermarket operations and enhance CX.



**LTIMindtree** provides tailored aftermarket solutions for discrete and process industries. Leveraging AI, the company offers innovative solutions such as the Field Mechanic Assistant Bot and the Intelligent Voice Assistant to enhance field service efficiency.



**TCS** focuses on organic growth, new-age services and partnerships to drive its aftermarket strategy. The company leverages digital technologies and in-house accelerators to deliver innovative solutions, covering marketing, field services and CRM.



**Tech Mahindra** offers a comprehensive suite of aftermarket services, including service warranty and parts management. It utilizes its proprietary platform, AftEAZE, to empower clients to optimize after-sales operations and drive business growth.



**Wipro** offers a comprehensive suite of aftermarket services, including warranty management, field service transformation and parts optimization. Leveraging its intellectual property (IP) and technology partnerships, Wipro delivers innovative aftermarket solutions.



**Akkodis (Rising Star)** offers aftermarket services under its SMART-TIDE framework, covering areas such as field management, warranty and reverse logistics. With deep consulting expertise and partnerships, Akkodis empowers clients to optimize aftermarket operations.



# HCLTech



“HCLTech’s comprehensive set of aftermarket capabilities intends to deliver best-in-class solutions and services with a focus on outcomes and aftermarket-led growth for organizations.”

*Swadhin Pradhan*

## Overview

HCLTech is headquartered in Noida, India. It has more than 227,500 employees across over 215 delivery centers worldwide. In FY24 the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. The company has vast experience in applying next-generation technologies, such as automation, analytics, IoT, AI, cybersecurity, cloud, AR, VR, mixed reality (MR), 3D printing and blockchain, to key manufacturing value chain components, including aftermarket services. HCL Aftermarket Cloud is an SLM platform that drives aftermarket-led growth opportunities.

## Strengths

**Strong partner ecosystem:** HCLTech has many partners focused on customer engagement and experience. Apart from its partnerships with SAP and Oracle, it collaborates with leading platforms such as Adobe, Sitecore and Drupal to offer services in digital marketing and CX.

**Focus on expanding capabilities:** HCLTech delivers a mix of specialty capabilities and core solutions using its software and consulting expertise, driven by industry and domain knowledge. HCL Software’s Aftermarket Cloud enables manufacturers to manage millions of endpoints effectively, unlocking new revenue streams through connected service value chain via dealer management system, digital commerce and over 14 specialty apps. It has a dedicated

Aftermarket NeXT framework, which is part of its Industry NeXT framework.

**Outcome-based approach:** HCLTech provides aftermarket services to clients across various manufacturing industries to drive growth and OpEx savings, delivering tangible numbers. It focuses on delivering revenue realization and proactive maintenance, ensuring a 360-degree view of warranty statuses and aftermarket entitlements, and optimizing the efficiency of parts supply, catalog, orders and inventory. HCLTech’s solutions help clients minimize unplanned downtime with predictive maintenance, remote resolution and IoT. It also drives revenue growth through as-a-service models and eCommerce using analytics and AI.

## Caution

HCLTech, with its focus on key aftermarket areas such as e-commerce contract management and dealer audits, should leverage its intellectual property (IP) and investment in software products to deliver its business differentiators around ROI.





# Industry Transformation Services

### Who Should Read This Section

This report is relevant to manufacturing enterprises in North America that are evaluating industry transformation service providers.

In this quadrant, ISG highlights the current market positioning of providers offering industry transformation services to manufacturing enterprises in North America and how each addresses the key challenges faced in the region.

Enterprises in North America face geopolitical uncertainties, economic pressures and security concerns, which makes consulting and advisory services essential for manufacturing companies to navigate and mitigate these complexities.

Enterprises are investing heavily in digital transformation within the manufacturing industry. They are utilizing AI, IoT and cloud to enhance operational efficiency, CX and innovation. These enterprises also aim to boost revenue, optimize costs and achieve operational excellence through process

reengineering and automation. They are seeking providers that offer robust advisory and consulting services and employ digital tools and methodologies that align with their strategic goals.

Service providers are prioritizing industry-specific, cloud-based solutions and engaging in coinnovation initiatives with clients to create customized approaches that address the manufacturing industry's unique challenges and opportunities. They leverage deep industry expertise and strategic technology partnerships while also investing in strong security measures to safeguard operations and sensitive data.



**Marketing, sales and operations leaders,** such as CMOs, should read this report to gain insights into market trends and consumer behavior and enhance CX.



**Digital leaders,** such as chief digital officers and CIOs, should read this report to drive digital transformation and leverage data-driven solutions to align with market changes and meet business goals.

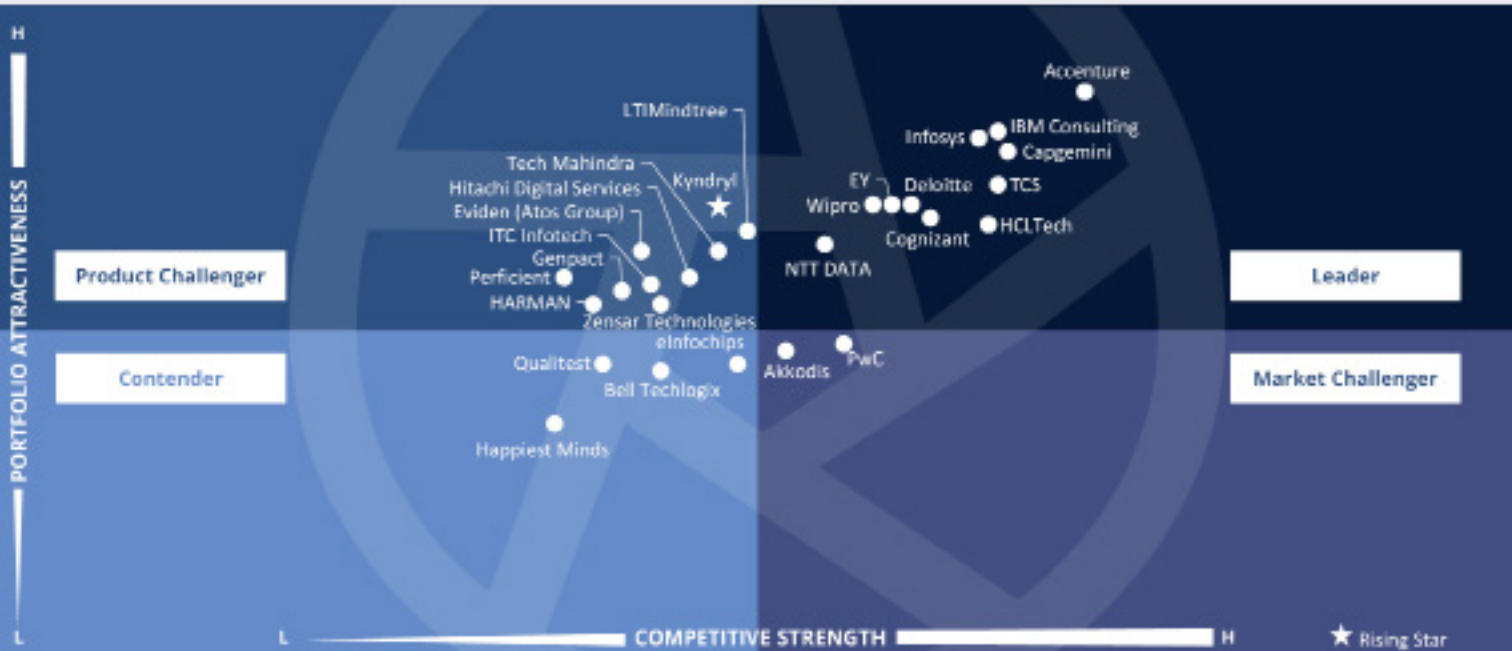


**Technology leaders,** such as CTOs, should read this report to find partners for building and developing industry-ready solutions by leveraging GenAI and industry clouds.



**Research and innovation leaders,** such as heads of research and innovation, can identify key trends for informed decision-making and integrate innovation into their management processes.





The quadrant assesses providers specializing in **operational and business consulting services** by leveraging technology that helps manufacturing companies gain efficiency and productivity in processes, accelerate innovation and achieve sustainability goals.

Swadhin Pradhan



### Definition

Manufacturing companies must modernize and transform their IT infrastructure to streamline operations, improve efficiency and support business transformation initiatives. Business transformation efforts in asset-heavy manufacturing industries are mainly driven by improving efficiency and productivity, enhancing customer experience, accelerating innovation, gaining competitive advantages, and achieving cost savings and sustainability goals.

Companies aim to achieve transformation by simplifying and reengineering processes, utilizing automation and AI, and exploring options such as ITO and BPO. They also reorganize IT operating models to meet changing business demands, such as leveraging global capability centers (GCCs). Manufacturers strive to improve revenues, optimize costs, achieve operational excellence and enhance business process efficiency through extensive reengineering and automation across business processes. This includes adopting digital tools and methodologies that align with their strategic objectives.

### Eligibility Criteria

1. Provision of **examples of work with various manufacturing industries** to develop a highly integrated model for driving transformation through broad-based solutions
2. Ability to **drive initiatives around** business and operations strategy, change management and end-to-end transformation
3. Ability to **reorganize IT operating models** to align with changing business demand (GCCs/ nearshoring/offshoring, agility and more)
4. **Offerings/services in areas** including, but not limited to:

- \* Digital strategy development
  - \* IIoT
  - \* Big data analytics
  - \* Infrastructure and cloud (multicloud and hybrid cloud)
  - \* Cybersecurity (SOCs and SIEM)
  - \* Service management
  - \* Vendor management
  - \* New-age ERP systems
  - \* Sustainability reporting
  - \* Cost optimization
  - \* Mobility solutions
  - \* Workforce enablement
  - \* Digital technology integration
  - \* Digitization/digitalization
  - \* Workplace of the future
5. Expertise in **next-gen technologies**, including automation, analytics, IoT, AI/ GenAI, cybersecurity, cloud, AR/VR/MR, 3D printing and blockchain
  6. Strong **partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in manufacturing
  7. **Referenceable case studies** from key manufacturing industries



## Industry Transformation Services

### Observations

Digital transformation is a core focus for manufacturing companies as they navigate external and internal challenges. The majority of companies in the manufacturing industry are heavily investing in digital transformation initiatives. Such initiatives involve leveraging technologies such as AI, IoT and cloud computing to improve operational efficiency, enhance CX and drive innovation. Thus, consulting and advisory services become critical for manufacturing companies as they look to mitigate the challenges posed by geopolitical uncertainties and economic pressures. Providers are recognizing the importance of strategic consulting and advisory services to guide their clients' digital transformation journeys. Firms such as Accenture, Capgemini, Deloitte, EY and IBM Consulting are leveraging their deep industry expertise and technology partnerships to provide tailored solutions.

Companies are focusing on industry-specific solutions and actively collaborating with clients through coinnovation initiatives. This approach enables them to develop customized solutions that address the unique challenges and opportunities within the manufacturing industry.

A cloud-first strategy is becoming increasingly important for manufacturing companies, and firms such as Accenture and Kyndryl are emphasizing cloud-based solutions. Additionally, cybersecurity is a critical concern, and companies are investing in robust security measures to protect their operations and sensitive data.

From the 100 companies assessed for this study, 27 qualified for this quadrant, with 11 Leaders and one Rising Star.



**Accenture**, with its cloud-first strategy, provides consulting and advisory services through its Industry X digital offerings. It is building digital transformation and engineering capabilities to help companies in the manufacturing industry.



**Capgemini** has a strong manufacturing advisory portfolio, including AI-powered solutions. The company has more than 1,500 manufacturing industry experts and has set up over 18 global manufacturing CoEs focused on various domains, technologies, tools and accelerators.



**Cognizant's** holistic approach, spanning smart manufacturing to smart utilities, highlights its expertise in tackling modern industrial challenges. Acquisitions have enhanced its capabilities in digital engineering and automotive technologies.



**Deloitte** leverages its extensive consulting expertise to help clients streamline operations and improve efficiency. With a robust network of technology partnerships and a dedicated advisory practice, the firm delivers transformation services.



## Industry Transformation Services

EY

**EY** employs a comprehensive approach to improving operational efficiency by utilizing its robust consulting expertise, frameworks, accelerators and extensive partnerships to advance its digitally driven innovation services.

### HCLTech

**HCLTech** provides extensive digital transformation frameworks leveraging AI and IoT to create resilient manufacturing operations. The company has many labs and multiple CoEs dedicated to various domains, technologies, tools and accelerators.

**IBM**

**IBM Consulting** leverages its technology and software solutions portfolio, deep consulting expertise, industry knowledge and extended partner network to provide differentiated end-to-end offerings to clients.

**Infosys**

**Infosys** continuously invests in its platforms and technologies to enhance its industry transformation services. Its strategic partnerships with key product companies and startups drive industry transformational solutions.

### NTT DATA

**NTT DATA**, with a consulting and technology-driven approach, has a significant presence in the global automotive sector. The company emphasizes investments in startups to advance IoT, digital twin, AI and ML solutions.

**TCS** TATA  
CONSULTANCY  
SERVICES

**TCS** employs a coinnovation approach with customers to explore new ideas, which are facilitated in pace ports, innovation centers and design studios through a design thinking-led methodology. Its portfolio of solutions and platforms helps clients accelerate their transformation process.

**wipro**

**Wipro** has strengthened its advisory capabilities through strategic acquisitions, such as PARI, and investments in critical assets and initiatives, such as OTNxT and Lab45, aiming to modernize its operations and promote innovative solutions.

**kyndryl**

**Kyndryl (Rising Star)** has made significant investments in building its consulting, cybersecurity, cocreation, partner ecosystem and OT capabilities to expand its solutions and offerings focused on digital transformation.



# HCLTech



“HCLTech utilizes its industry-centric tools and frameworks and advanced technologies to propel industry transformation services for manufacturing clients.”

Swadhin Pradhan

## Overview

HCLTech is headquartered in Noida, India. It has more than 227,500 employees across over 215 delivery centers worldwide. In FY24 the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech offers targeted consulting services that align business needs with technology opportunities, focusing on large-scale transformation programs. The company provides industry-specific advisory services to more than 200 clients in 60 countries, helping them leverage data insights, optimize processes, reduce costs and enhance their competitive advantage in the manufacturing industry.

## Strengths

**Comprehensive frameworks for digital transformation:** HCLTech's suite of prebuilt solutions and frameworks help clients in their digital transformation journey. HCLTech's Industry NeXT framework, which focuses on supply chain, IT/OT convergence, digital manufacturing and operations, sustainability, connected asset data and immersive experiences, facilitates seamless digital transformation. This framework enables manufacturers to create resilient operations and connected experiences to drive operational excellence and efficiency improvements.

**Proven track record in manufacturing:** HCLTech brings over four decades of expertise in industry and process consulting to clients in the manufacturing industry,


offering deep insights into industry challenges. The company's IT consulting and BPO services integrate advanced technologies such as 5G, digital twin and cybersecurity with the help of its robust partner network.

**Focus on sustainability:** HCLTech provides digital transformation consulting services focused on sustainability, with skilled professionals delivering services across various domains. The company demonstrates its commitment to sustainability through green IT solutions that support eco-friendly initiatives. HCLTech is also upskilling its workforce in sustainability to embed eco-friendly practices across its operations.

## Caution

HCLTech should build strong partnerships with niche technology companies and industry specialists to enhance its capabilities and solutions for sustainable operations, thereby improving efficiency and competitiveness in manufacturing.





# Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.





# Appendix

The ISG Provider Lens 2024 – Manufacturing Industry Services and Solutions research study analyzes the relevant software vendors/ service providers in the North America 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 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.

The study was divided into the following steps:

1. Definition of Manufacturing Industry Services and Solutions market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies



*Lead Analyst*

**Swadhin Pradhan**  
**Assistant Director and Principal Analyst**

Swadhin Pradhan brings more than two decades of technology, business and market research experience and expertise to ISG clients. He has rich experience executing market/competitive intelligence (MI/CI) and quasi-consulting projects in the manufacturing, energy and resources industry.

Prior to ISG, Swadhin worked with MI/CI and thought leadership organizations of large tech and consulting firms such as IBM and Deloitte. At ISG, He focuses on ISG Provider Lens™.

His research and analysis for ISG clients concentrates on Energy, Resources and Manufacturing market development, disruption and change. He currently contributes to ISG's Provider Lens™ global research studies as a lead analyst.

Swadhin holds an MBA in Marketing and Finance from the Institute for Integrated Learning in Management (IILM), New Delhi, and an engineering degree in Electronics and Telecom.



*Research Analyst and Co-author*

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Varsha Sengar is a senior research analyst at ISG and is responsible for supporting ISG Provider Lens™ studies on Workday, Retail & CPG, Manufacturing and Chemicals Services and Solutions. She has over 7 years of experience in technology research and consulting. At ISG, she is responsible for delivering enterprise' perspective for IPL and collaborates with analyst, advisors, and enterprise clients on various research requests which include primary and secondary research.

She supports the lead analysts across multiple regions in the research process and authors the global summary report. Prior to this role, she has carried out multiple ad-hoc projects and competitive benchmarking reports delivering industry level actionable insights and recommendations Her area of expertise lies across various technologies like IoT, Artificial Intelligence, Smart Homes, and Autonomous Driving.



## Author & Editor Biographies



*Study Sponsor*

**Iain Fisher**  
**Director, Research**

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximize benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.



*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

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 partner and global head of 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™

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™

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, cities) as well as higher education institutions. Visit: [Public Sector](#).

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## \*ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit [isg-one.com](http://isg-one.com).





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