ISG Provider Lens®

# Digital Engineering Services

Analyzing digital engineering capabilities from design to CX

Customized report courtesy of:

HCLTech

**QUADRANT REPORT | APRIL 2026 | EUROPE**

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*Report Author: P N Srinivasan*

**Europe advances intelligent, sustainable engineering powered by AI, platforms and deep domain expertise**

**Executive perspective**

European enterprises are shifting from digitalization to AI-native, software-defined and sustainability-anchored engineering amid stringent regulatory guardrails and accelerating innovation cycles. This transition places large service providers at the core of value creation: integrating chip-to-cloud stacks, converging IT/OT, industrializing digital thread and digital twin and operationalizing responsible AI. The near-term imperative is to compress time-to-impact, modernize legacy estates, scale intelligent automation and demonstrate measurable outcomes while building the talent, platforms and governance to sustain innovation. Leaders will combine platform-led delivery with domain depth to unlock resilient, compliant and differentiated growth across Europe.

**Evolving market landscape in Europe**

Europe's digital engineering landscape is defined by cyber-physical convergence and rising expectations around safety, privacy, sovereignty and sustainability. Engineering is no longer a back-office function; it is the strategic lever to deliver connected products, real-time services and circular business models. As software and silicon increasingly determine product performance, enterprises must align embedded systems, cloud platforms, edge analytics and OT into a unified, governable fabric.

Three structural forces shape the digital engineering services market. First, regulation and trust: explainability, data minimization, security-by-design and auditable processes are baseline expectations, not differentiators. European manufacturers and operators must design for conformity, traceability and lifecycle stewardship, from requirements to post-market surveillance. This shift demands an increased focus on Digital Product Passport-style constructs and ESG disclosures, as these mechanisms embed product data deeper into engineering, materials and supply chains.

# Digital engineering in Europe is powering **intelligent, secure and connected** products and services.


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Second, resilience at speed: supply chain disruptions, energy volatility and time-to-market compression demand model-based engineering, simulation-led validation and digital twins that shorten cycles while derisking quality. Cloud-based data fabrics, event-driven architectures and edge and 5G capabilities are becoming the substrate for near real-time decisions in production and field operations.

Third, talent and delivery geometry: the skills mix is shifting toward systems engineering, safety, AI and ML, platform engineering and security. Enterprises are seeking nearshore capacity, multilingual collaboration and partners fluent in European compliance and industry codes. As organizations replatform engineering workflows, they also expect repeatable, product-centric operating models with clear outcome visibility. The net result is that buyers increasingly favor large providers that can combine deep domain intellectual property, scaled delivery and governed AI with platformized accelerators, capable of meeting European standards without sacrificing velocity.

**Shifting enterprise mandates**

**Make engineering AI-native and safe by design:** Enterprises are evolving from AI-enabled features to AI-native products and operations, embracing agentic systems, autonomous decisioning and closed-loop optimization across design, manufacturing and service. European buyers emphasize explainability, robustness and certification readiness, expecting providers to operationalize responsible AI and rigorous validation alongside productivity gains.

**Compress time-to-market without compromising quality:** With shorter product launch cycles, enterprises are adopting shift-left verification, simulation-centric validation and model-based systems engineering (MBSE) to orchestrate multidisciplinary requirements. They are deploying digital twins (product, production and operational) to underwrite faster iteration, expand coverage and reduce physical prototypes while maintaining audit trails.

**Modernize legacy estates into platformized, modular architectures:** Siloed product lifecycle management (PLM), manufacturing execution systems (MES) and ERP, in addition to bespoke toolchains, results in slow change. Enterprises seek cloud-based data fabrics, API-first integration and platform engineering patterns that enable discoverability, reuse and golden paths for developers. The outcome is fewer fragile point-to-point integrations, more resilient releases and quick feature shipping at scale.

**Establish digital thread and lifecycle traceability:** From requirement to field performance, European organizations need end-to-end traceability. A digital thread connects engineering artifacts, manufacturing execution, service history and sustainability metrics, supporting conformity assessment, warranty analytics and circularity decisions (repair, reuse, recycle).

**Engineer for sustainability and circularity:** Buyers now treat energy use, material choices and end-of-life as primary design inputs. They seek partners that quantify lifecycle impacts, integrate DfS (Design for Sustainability) guidelines and embed carbon and ESG telemetry into product and operations twins, supporting evolving disclosure regimes and passport-style product data.

**Elevate data readiness and security posture:** AI scale-up stalls without clean, contextual data. Enterprises prioritize governed data products, role- and attribute-based access and zero-trust patterns across IT/OT. They expect LLMOps/MLOps with lineage, evaluation and model risk management, mandatory requirements in regulated sectors.

**Rewire operating models and skills:** The center of focus is shifting to product-centric, cross-functional pods that blend hardware, software, data and safety. Enterprises expect providers to bring accelerators, reusable assets and co-innovation constructs, while helping upskill internal teams on MBSE, platform engineering and AI. Talent pyramids are flattening with fewer purely operational roles, more senior practitioners, amplified by AI co-pilots across the SDLC.

**Protect intellectual property and preserve autonomy:** Clients want composable ecosystems without lock-in, retaining control


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of critical IP and the option to change components with minimal reengineering. Providers must meet this with open patterns, portability and clear intellectual property frameworks.

**Provider dynamics**

**From services to platforms:** Large providers are industrializing DES through platform-led delivery, domain-specific LLMs, agentic AI libraries, governed LLMOps, digital twin templates and factory patterns for code generation, test synthesis and SDLC telemetry. This shifts value from labor arbitrage to intellectual property-rich accelerators and repeatable blueprints that compress discovery-to-production timelines and make outcomes measurable.

**Integrated cyber-physical engineering:** To meet Europe's complex requirements, leaders have built chip-to-cloud stacks, silicon-embedded, real-time OS, connectivity, edge analytics, and hyperscaler services, linked to IT/OT integration and safety-critical engineering. In automotive, these services enable software-defined vehicle (SDV) roadmaps and virtual validation and in aerospace and energy, they support model-based certification and operational twins for reliability, turnaround time and sustainability.

**Nearshore scale and regulated market fluency:** Providers continue to expand European engineering hubs and CoEs, pairing multilingual delivery with knowledge of sector codes, safety cases and data residency. Responsible AI guardrails are embedded in patterns and tools, evaluation harnesses, policy as code, auditability and red teaming to deploy AI at pace without compromising governance.

**Outcome-aligned commercials:** Buyers favor consumption-based and outcome-linked models tied to performance metrics such as defect leakage, cycle time, first-pass yield and energy optimization. Providers respond with observability-to-value stacks, mapping telemetry and experience signals to KPI/XLA frameworks for line-of-sight benefits.

**Green by design:** GreenOps practices are moving from slideware to embedded guardrails: energy-aware architectures, telemetry for carbon intensity and lifecycle analytics informing engineering choices. This shift is resonant in Europe, where sustainability is both a regulatory and commercial mandate.

**Partner ecosystems and co-innovation:** Leaders are curating selective alliances — industrial software, hyperscalers, silicon vendors, connectivity and security partners — to help clients get pre-integrated stacks. Co-innovation programs with OEMs and tiered suppliers turn pilot islands into portfolio-scale adoption.

**Targeted regional acquisitions strengthening European depth:** Over the last 12-18 months, major large providers have reinforced their European DES portfolios with targeted niche acquisitions, typically in the $50-$200 million range, focused on specialized engineering talent, local regulatory familiarity and sector-specific intellectual property. Providers such as Cognizant, Infosys, HCLTech, Accenture and Wipro have each added at least one such capability to strengthen regional relevance and accelerate delivery for European clients.

What differentiates the Leaders:

- AI-native engineering at scale: not just proofs, but governed rollouts across portfolios
- Systemic traceability: digital thread from requirements to field, integrated with conformity and sustainability data
- Composable foundations: API-first, event-driven and portable architectures to avoid lock-in and speed change
- Talent orchestration: senior practitioner density, nearshore depth and AI-augmented delivery
- IP velocity: reusable twins, safety case assets and automation patterns that reduce time-to-value

**Strategic Outlook**

The next phase in Europe will reward providers and enterprises that embed intelligence, traceability and sustainability into the core of engineering, not as add-ons. The reference architecture is becoming clear: platformized DES with governed AI, lifecycle twins and product-centric operating models that convert


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telemetry into action and actions into auditable outcomes.

For enterprises, the near-term no-regrets moves are:

1. Harden data foundations (quality, lineage, policies) to unlock AI at scale
2. Adopt MBSE and simulation-led validation to compress cycles while improving coverage
3. Establish digital thread across PLM/MES/ERP/field to support conformity, warranty analytics and circularity
4. Platformize engineering: golden paths, site reliability engineering (SRE) and DevSecOps for reliability and speed
5. Operationalize responsible AI with evaluation and risk controls
6. Codify GreenOps to allow sustainability metrics to shape design choices, not just reports

For large providers, differentiation will hinge on:

- AI-native portfolios that prove uplift beyond productivity (for example, quality, yield and energy)
- Composable, sovereign-ready platforms that preserve client intellectual property and switching optionality
- Outcome-aligned commercials with transparent value realization
- Selective M&A to deepen local, sector-specific capability, where build versus buy favors speed

Europe's DES market is consolidating around players that can blend scale with specialization, global platforms and delivery, along with local credibility, domain intellectual property and governance. Providers that master this blend will set the pace in speed, safety, sustainability and scale over the next planning horizon.

Europe is accelerating its digital engineering maturity, enabling smarter and sustainable value chains. While the region addresses regulatory complexity, data fragmentation and diverse cultural expectations, enterprises are turning to advanced engineering frameworks and responsible AI. Providers must demonstrate digital capabilities that bring efficiency, transparency and measurable outcomes, helping organizations modernize with confidence and precision.


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# Provider Positioning

**Page 1 of 3**

| | Augmented Design and R&D Services | Intelligent Operations and Connected Experiences | Integrated Platform and Application Services |
|---|---|---|---|
| Accenture | Leader | Leader | Leader |
| AFRY | Product Challenger | Product Challenger | Market Challenger |
| Akkodis | Leader | Leader | Leader |
| Alten | Rising Star ★ | Rising Star ★ | Market Challenger |
| Capgemini | Leader | Leader | Leader |
| CGI | Product Challenger | Product Challenger | Rising Star ★ |
| Cognizant | Leader | Leader | Leader |
| Deloitte | Product Challenger | Product Challenger | Product Challenger |
| DXC Technology | Product Challenger | Product Challenger | Product Challenger |


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# Provider Positioning

**Page 2 of 3**

| | Augmented Design and R&D Services | Intelligent Operations and Connected Experiences | Integrated Platform and Application Services |
|---|---|---|---|
| EPAM Systems | Product Challenger | Product Challenger | Product Challenger |
| Eviden (Atos Group) | Product Challenger | Product Challenger | Product Challenger |
| Fujitsu | Market Challenger | Contender | Contender |
| GlobalLogic | Leader | Product Challenger | Leader |
| Globant | Contender | Contender | Contender |
| HCLTech | Leader | Leader | Leader |
| IBM | Product Challenger | Not In | Product Challenger |
| Infosys | Leader | Leader | Leader |
| LTM | Product Challenger | Product Challenger | Product Challenger |


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# Provider Positioning

**Page 3 of 3**

| | Augmented Design and R&D Services | Intelligent Operations and Connected Experiences | Integrated Platform and Application Services |
|---|---|---|---|
| NTT DATA | Product Challenger | Leader | Leader |
| Publicis Sapient | Contender | Contender | Contender |
| PwC | Product Challenger | Product Challenger | Product Challenger |
| Samsung SDS | Contender | Product Challenger | Product Challenger |
| TCS | Leader | Leader | Leader |
| Tech Mahindra | Leader | Leader | Rising Star ★ |
| Vivicta | Market Challenger | Product Challenger | Market Challenger |
| Wipro | Leader | Leader | Leader |


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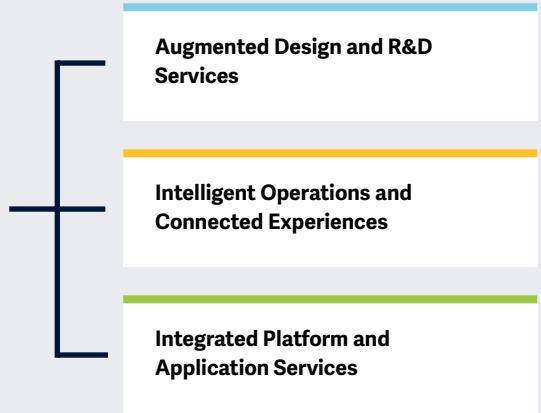
Key focus areas of **Digital Engineering** 2026 study

Simplified Illustration Source: ISG 2026




**Definition**

**The ISG Provider Lens® Digital Engineering Services 2026 study offers the following to business and IT decision-makers:**

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

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

**Large Providers** are those with revenues exceeding $2 billion and a workforce of more than 100,000 employees. They cater to multiple verticals, often spreading their resources across a broad range of industries. Their primary focus lies in serving large enterprises, often engaging in large transformation projects that require deep expertise, extensive resources and the ability to manage complex, enterprise-wide innovations. Their deep industry experience, broad service capabilities and strategic partnerships with technology giants position them as key players in the global digital services landscape.

**Midsize Providers**, on the other hand, generate less than $2 billion in revenue and typically specialize in 3-4 verticals where they hold strong capabilities and significant revenue share. With a lean workforce of less than 100,000 employees, these providers adopt an agile and flexible approach, making them well-suited to serve both large enterprises and midmarket clients with tailored, industry-specific solutions. They also have strong inherent capabilities and heritage in Digital Engineering services. This combination of domain expertise, flexibility and a strong focus on innovation positions them as effective partners for businesses seeking to implement cutting-edge technologies with a faster, more agile approach.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**Scope of the Report**

This ISG Provider Lens® quadrant report covers the following three quadrants for services: Augmented Design and R&D Services, Intelligent Operations and Connected Experiences, and Integrated Platform and Application Services.

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

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

**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).


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**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.

**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.

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

**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.


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# Augmented Design and R&D Services

## Who Should Read This Section

This report is valuable for providers offering augmented design and R&D services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### Design leaders

should read this report to understand the developments in the industry, enabling them to choose and partner with the right provider that can transform their digital landscapes. The report allows them to understand the provider capabilities in terms of their design capabilities, usage of latest technologies like GenAI and AgenticAI, MBSE, innovation abilities.

### Engineering leaders

must read this report to comprehend the relative strengths and weaknesses of providers offering design and development services in the digital engineering space. The report also helps them understand the capabilities surrounding the use of advanced technologies such as GenAI or agentic AI, proprietary tools and intellectual property assets that could support enterprises in achieving business outcomes and value.

### Software development and technology leaders

should read this report to understand the relative positioning of providers and learn how their digital engineering offerings can impact transformation initiatives. The report also details the strengths and opportunities of areas of providers, including connected platforms and ecosystems, personalization and GenAI and agentic AI.


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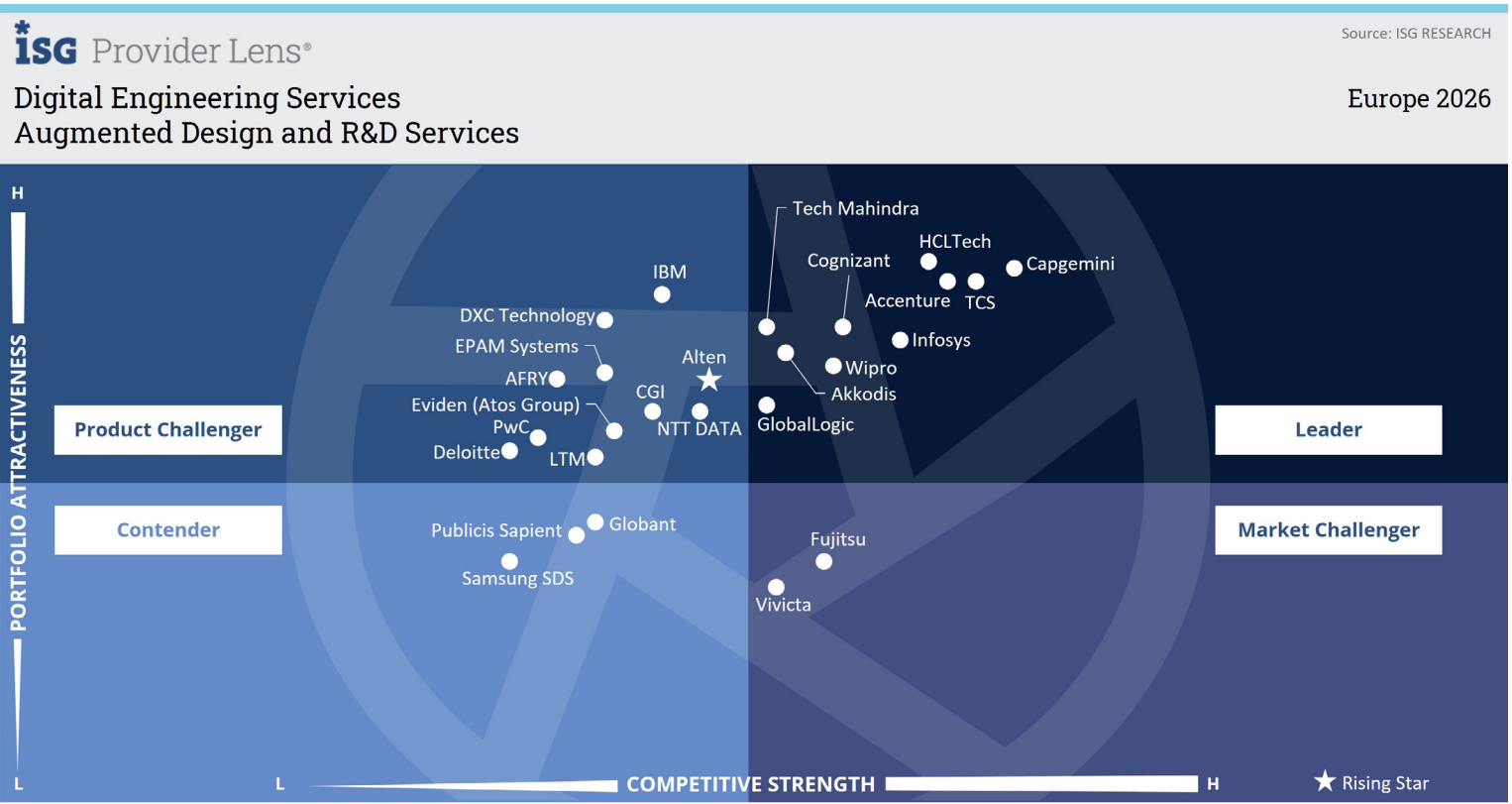


This quadrant covers providers enabling end-to-end **digital product design and R&D**, from ideation to prototyping. **GenAI-driven design exploration, simulation and virtual engineering** play a key role in accelerating innovation and enhancing design precision.

*P N Srinivasan*


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**Definition**

This quadrant assesses providers' ability to deliver advanced, AI-enabled design and R&D services across the full product and service innovation lifecycle. It emphasizes generative design, behavioral intelligence and cloud-native engineering to accelerate ideation, simulation, prototyping and validation. Providers enable agile, data-driven, model-based engineering using digital twins to simulate real-world conditions.

The services in scope support smart, sustainable and hyperpersonalized products and experiences. Key capabilities include digital design failure mode and effects analysis (DFMEA), virtual validation, GenAI and LLMs to automate design and testing, accelerate time to market, improve quality and strengthen early-stage quality assurance. V&V is prioritized, with virtual prototyping tools addressing extreme test cases via GenAI.

The quadrant also covers AR/VR/MR, additive manufacturing, design for manufacturing – DFM and digital twins for collaborative design, rapid iteration and predictive simulation. Providers are expected to show maturity in managing complex engineering and adopting responsible, sustainable innovation practices.

Eligibility Criteria

1. Supporting **digital product development across both physical and virtual R&D** and **design strategies for new products, services and business models,** including integration and scaling across enterprise environments
2. Applying **design thinking, requirements analysis** and **iterative design** to drive creativity and innovation in product and service development while exploring thousands of options through iterative, parametric and sensitivity analyses to identify the optimal solution for each context
3. Delivering **human-centric design** through persona-based journey mapping, storyboarding, UI/UX, and industrial, service and interaction design, with GenAI-powered hyperpersonalization (for example, digital avatars as service assistants)
4. Enabling **model-based systems engineering (MBSE), digital twin, rapid prototyping and autonomous testing** using platforms and PLM tools, supported by data- and model-driven engineering
5. Integrating **AR/VR/MR, additive manufacturing** and **3D printing** to support immersive and extended reality-based design and validation
6. Demonstrating success stories in leveraging **GenAI** for design automation, simulation and product experience management, with a focus on **responsible and sustainable design**


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**Observations**

Enterprises are intensifying their focus on intelligent, high-velocity product development, yet many continue to face structural barriers that limit innovation. Increasing complexity across hardware, software, electronics and AI systems forces organizations to seek service providers that can operate as an extension of their R&D ecosystem.

Providers support the full lifecycle from idea exploration to engineering design, simulation, prototyping and validation, while also guiding teams through modern digital methods that blend MBSE, digital threads and domain-driven design. The adoption of GenAI in early stage exploration, engineering knowledge retrieval, automated documentation and validation is gaining significant traction, helping enterprises improve precision and reduce manual effort across engineering workflows. Virtual environments and digital twins are enabling faster iteration cycles with improved accuracy and traceability, especially in regulated industries where design intent and certification readiness must be tightly controlled.

This Augmented Desgin and R&D Services quadrant examines the extent to which providers elevate clients' design velocity, reduce physical iteration and enable scalable quality through advanced engineering capabilities. Providers demonstrating strong generative design, autonomous engineering agents and integrated simulation-driven approaches stand out by delivering measurable improvements in productivity, quality and time-to-market.

From the 26 companies assessed for this study, 26 qualified for this quadrant, with 10 being Leaders and one Rising Star.

**Accenture** integrates software, physical product, platform and silicon engineering into an AI-first, end-to-end product transformation offering. It operates from advisory through build and run, helping clients reimagine how products are conceived, engineered and maintained.

**Akkodis** positions itself as a digital engineering convergence specialist with strong product design, embedded engineering, SDV verification, digital twins and MBSE capabilities delivered through global practices and supported by new leadership hires and domain-focused academies.

**Capgemini** frames AI-enabled engineering around *AI for the product and AI in the product*. As clients shift from scattered PoCs to AI-first engineering transformations, especially in formulation-heavy industries, Capgemini recognizes the need for deterministic approaches for safety-critical physical products.

**Cognizant** delivers an integrated systems engineering-led approach using MBSE, digital thread and digital twins, strengthened by Belcan's deep aerospace, defense and complex ER&D heritage.

**GlobalLogic** positions itself as a design-led digital engineering partner, combining Method's consulting strengths with GlobalLogic's engineering depth to deliver upstream product definition and downstream development.

**HCLTech** delivers end-to-end product engineering across mechanical, hardware, embedded, silicon and software, with strong digital design, MBSE and experience design capabilities backed by over 50 years of engineering heritage.

**Infosys** positions its engineering business around AI-led physical product development with strong MBSE, digital twin and physical AI capabilities, supported by over 30 years of engineering expertise and next-generation mobility, IoT and device engineering practices.


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**TCS** leverages deep domain expertise, AI-first strategies and advanced frameworks to accelerate product engineering and design innovation across automotive, aerospace and semiconductor industries.

**Tech Mahindra** positions engineering transformation around its model-based everything (MBX) framework, integrating model-based design, manufacturing, maintenance and digital twins into a unified lifecycle thread.

**Wipro** Engineering as a chip to cloud engineering player with over 35 years of ER&D heritage, combines mechanical design, PLM/MBSE, Industry 4.0 and AI-first engineering across industries to offer end-to-end capabilities across the value chain.

### Alten (Rising Star)

**Alten (Rising Star)** differentiates itself in design and R&D through its engineering-first DNA, structured innovation programs and reusable technical assets that enable full lifecycle product development in complex, regulated industries.


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Leader

"HCLTech blends its chip-to-cloud engineering, MBSE-driven digital design and human-centric experience studios to accelerate the creation of intelligent, differentiated products."

*P N Srinivasan*

# HCLTech

**Overview**

HCLTech is headquartered in Noida, India. It has more than 223,400 employees worldwide. In FY25, the company generated $13.8 billion in revenue. In Europe, HCLTech strengthens engineering programs through its MBSE and digital thread capabilities, supported by labs in Munich and robust delivery centers across Germany, Sweden and the Nordics. The region benefits from HCLTech's in-depth automotive engineering expertise, including E/E validation, HIL labs, SDV development and medtech innovation. The company reinforces these capabilities through accelerators such as xLMate, AI Force and XR-led design systems to accelerate prototyping, compliance and R&D modernization.

**Strengths**

**End-to-end product and silicon engineering:** HCLTech offers a broad product engineering portfolio spanning mechanical design, embedded software, hardware and very-large-scale integration (VLSI), AI engineering, clean tech and software product engineering. These capabilities enable the development of software-defined, sustainable products across industries.

**Digital design, MBSE and PLM depth:** HCLTech's digital design portfolio covers systems engineering, application lifecycle management (ALM), PLM, E/E management, configuration and bill of materials (BOM) management, simulation process management and regulatory compliance, supported by an MBSE CoE and 360-degree ISV partnerships. This framework improves traceability, design quality and time-to-market for complex product programs.

**Integrated experience and XR design studios:** Through STRIDE and Experience and XR Studios, HCLTech brings UX, human-machine interface, industrial design, human factors, and spatial and XR design under one roof, delivering ergonomic, user-centric products. Case studies in cardiac systems, printers and smart implants illustrate its ability to combine design, engineering and connectivity for measurable clinical and operational impact.

**Caution**

HCLTech's rich portfolio of design platforms and frameworks could benefit from a concise narrative that explains how these components integrate into a unified, repeatable R&D transformation approach.


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# Intelligent Operations and Connected Experiences

## Who Should Read This Section

This report is valuable for providers offering intelligent operations and connected experiences in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### Operations leaders

should read this report, as it presents a comprehensive evaluation of providers that improve operational efficiency by making them to be more intelligent, connected and smart. This report can help them select partners who can support their execution of strategic goals while ensuring resilient, compliant and high-performing operations.

### Engineering leaders

must read this report to comprehend the relative strengths and weaknesses of providers offering intelligent operations and connected experience services in the digital engineering space. The report also helps them understand the capabilities surrounding the use of advanced technologies such as GenAI or agentic AI, proprietary tools and intellectual property assets that can support enterprises in achieving business outcomes and value.

### Software development and technology leaders

should read this report to understand the relative positioning of providers and learn how their digital engineering offerings can impact transformation initiatives. The report also details the strengths and opportunities of areas of providers, including connected platforms and ecosystems, personalization and GenAI and agentic AI.

### Manufacturing leaders

should read this report to understand the relative positioning of providers and learn how their digital engineering offerings can impact an enterprise's transformation initiatives. The report also helps them understand the capabilities surrounding the digital supply chain, digital virtual assistants, proprietary tools and technologies used by providers to make legacy units smart and connected.


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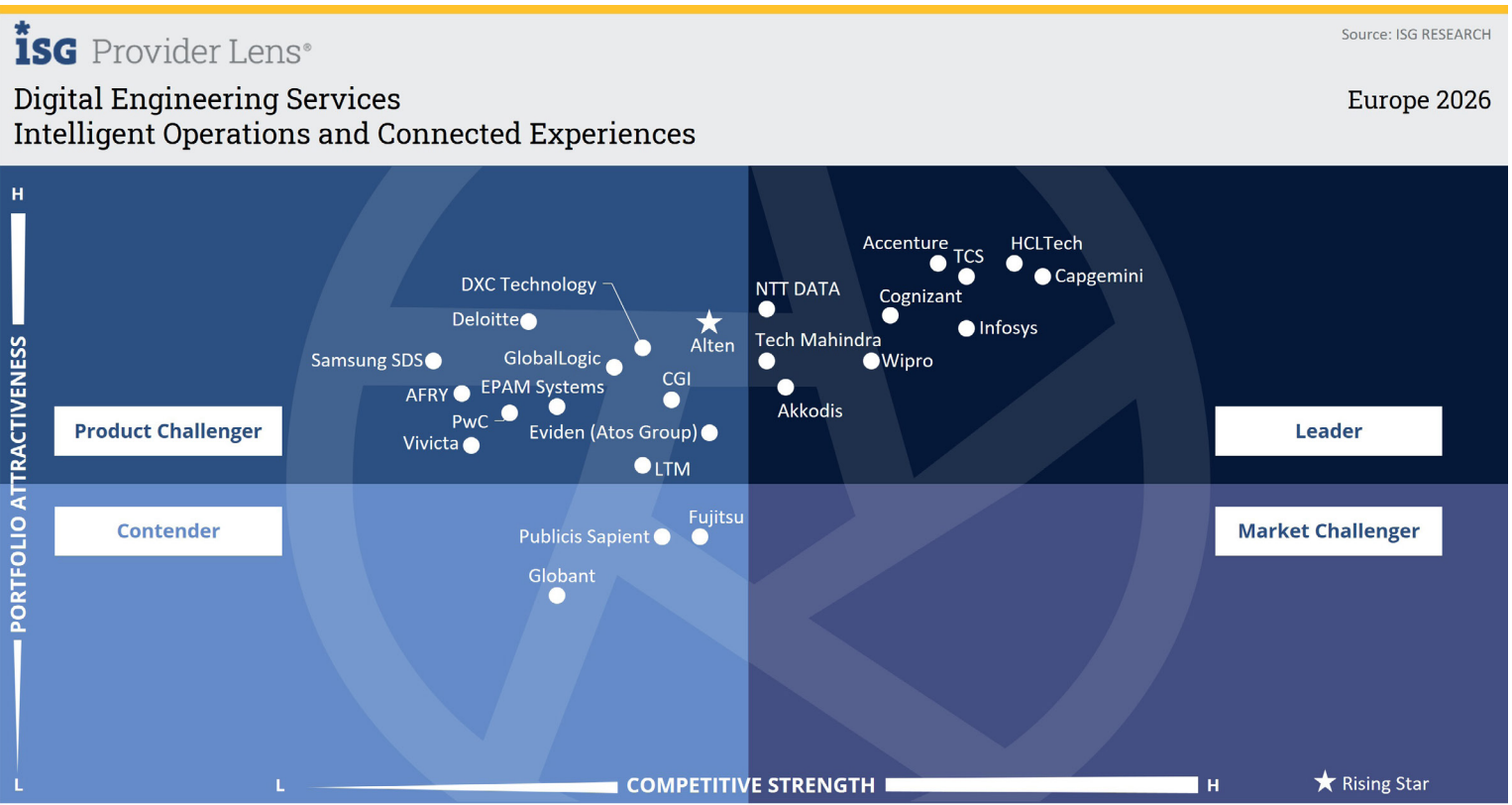


This quadrant evaluates providers that enable real-time, **connected and intelligent operations** by integrating technologiesandsupport **predictive insights, connected worker experiences and unified operations** for better efficiency and responsiveness.

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**Definition**

This quadrant evaluates providers that deliver standardized, intelligent, connected and adaptive operations across industries, enabling seamless CX and UX. It merges traditional operational intelligence with modern experience orchestration, reflecting backend efficiency and frontend engagement, extending value beyond the enterprise firewall. Providers support Industry 4.0 and 5.0 paradigms, including smart factories, IIoT, digital twins and edge computing, while integrating GenAI and behavioral analytics to optimize workflows, predict failures and enhance service delivery.

The quadrant also covers experience management: UX/CX/DX orchestration, VoC integration and hyper personalized support via digital avatars and conversational AI. The scope includes CX management, agile supply chains, self-healing systems and remote operations, with an emphasis on sustainability, automation and real-time responsiveness. Providers must deliver intelligent, scalable and controllable operations with manual interventions aligned with Industry 5.0, tightly coupled with customer visibility, feedback and experience data.

Eligibility Criteria

1. Having proven experience in **design, implementation and operation of technologies and processes** aligned with Industry 4.0 and 5.0, including smart production, intelligent supply chains, CX (physical and digital) and service operations
2. Delivering **connected operations** across diverse industries, with regional relevance and scalability
3. Integrating **IT/OT/ET environments,** covering data, security and workforce aspects, supported by robust OT solutions
4. Having capabilities in **asset performance monitoring, predictive maintenance** and **lifecycle optimization** using AI, ML and digital threads
5. Using **GenAI** for predictive analytics, process optimization, documentation automation and quality control
6. Delivering **experience management** through UX/CX/DX orchestration, real-time feedback loops and VoC integration
7. Supporting **remote operations, business continuity** and **self-healing systems** using AR, VR, drones and digital avatars
8. Using **conversational AI, NLP/NLU/NLG** and virtual agents for intelligent customer support and knowledge curation
9. Showcasing success in **hyperpersonalization, targeted content delivery** and **feedback-driven operations improvement** using GenAI


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**Observations**

Enterprises are under increasing pressure to create intelligent, adaptive and human-centered operational environments that integrate product, process and CX data into a unified, real-time decision framework. Many continue to face challenges due to fragmented IT and OT estates, inconsistent data quality, siloed processes and limited ability to act on insights at speed. As connected systems, edge computing, GenAI and predictive intelligence mature, enterprises are turning to service providers to orchestrate these capabilities into reliable and scalable operational models.

Providers are helping organizations build connected worker platforms, predictive maintenance ecosystems, AI-powered orchestration engines and immersive interfaces that augment workforce performance while enhancing safety and efficiency. Real-time operational intelligence is becoming a core differentiator, enabling enterprises to align experience signals with process telemetry and to respond proactively rather than reactively. This quadrant assesses how effectively providers integrate intelligence, connectivity and experience design to create measurable business outcomes. Providers that excel in edge-to-cloud architectures, multi-modal interaction models, operational digital twins and unified command center constructs are emerging as leaders, enabling clients to achieve higher asset reliability, frictionless human experience and continuous operational improvement.

From the 26 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

**Accenture** targets intelligent operations by digitizing engineering and manufacturing, deploying AI-enabled digital twins and optimizing service and maintenance decisions across industries. It also positions GCCs as transformation hubs to sustain these changes at scale.

AKKODiS

**Akkodis** leverages a strong industrial and manufacturing heritage to offer intelligent operations across factory design, robotics, simulations, logistics optimization, predictive maintenance and digital twins.

Capgemini

**Capgemini** focuses on edge AI-driven manufacturing and operations, noting that processing hot data at the edge is critical for real-time decisions on the shopfloor. It emphasizes human-in-the-loop supervision, Industry 4.0/5.0 and the evolving role of operators augmented by AI, rather than fully autonomous dark factories.

cognizant

**Cognizant** advances intelligent operations with its APEx GenAI-enabled smart manufacturing platform, while Cognizant Moment and experience-led engineering deliver hyperpersonalized, connected experiences for customers and employees.

HCLTech

**HCLTech** positions itself at the intersection of Industry 4.0/5.0, physical AI and digital thread, using AIForce, Plant-in-a-Box and MetaTwin to transform factories from visible to increasingly autonomous and experience-rich operations.

Infosys

**Infosys** targets intelligent operations through AI-first approaches in engineering COTS, connected manufacturing, Industry 4.0 and cyber-physical systems, while leveraging design consulting and Kaleidoscope to shape human-centric experiences.

NTT DATA

**NTT DATA** uniquely combines digital twins, connected operations and AI-driven insights to create highly responsive, predictive industrial environments.


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**TCS** drives intelligent operations through its Neural Manufacturing framework and Connected Digital Enterprise platform, enabling end-to-end visibility and autonomous decision-making across manufacturing and supply chain ecosystems.

**Tech Mahindra** focuses on digitizing manufacturing and field operations through model-based intelligence, digital twins, engineering-grade AI agents and virtual commissioning. Its approach positions MBX as the foundational data layer for operational optimization, enabling improved quality and efficient supply chain, processes and asset workflows.

**Wipro** is a leader in smart manufacturing, industrial AI and connected experience, combining OT modernization, digital twins, industrial analytics, robotics (via Wipro PARI) and experience-led orchestration via Designit and Huemen.

### Alten (Rising Star)

**Alten (Rising Star)** leverages its Smart Factory frameworks, digital continuity capabilities and IT/OT integration expertise for intelligent operations, modernizing industrial environments and enabling data-driven operational performance.


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Leader

"HCLTech's combination of physical AI, robotics, digital twins and XR-driven experience design enables enterprises to move from instrumented plants to intelligent, self-optimizing operations."

*P N Srinivasan*

# HCLTech

**Overview**

HCLTech is headquartered in Noida, India. It has more than 223,400 employees worldwide. In FY25, the company generated $13.8 billion in revenue. HCLTech drives smart manufacturing and connected operations across Europe through its Plant-in-a-Box framework, digital twins and AI-driven predictive maintenance. Its engagement with major European manufacturers, including wind turbine OEMs and electronics firms, leverages platforms such as EdgeLITy, VisionX and SmartTwin and Industry 4.0 frameworks to improve throughput, integrate IT/OT environments and enhance sustainability. XR-enabled training and real-time quality analytics further strengthen autonomous operations in the region.

**Strengths**

**Robust Industry 4.0/5.0 and manufacturing stack:** HCLTech offers consulting, MES, manufacturing operations management (MOM), manufacturing intelligence, robotics and cobotics, plant and process simulation, and sustainability engineering, underpinned by assets such as Plant-in-a-Box, XTERN and AI Force. They are used to modernize OT landscapes, accelerate multi-plant rollouts and improve OEE, security and quality for pharmaceutical, appliance and automotive manufacturers.

**Physical AI and intelligent operations:** HCLTech offers solutions such as AssetTwin 360, Machine Integration Framework, InsightGuard and 3D industrial inspection, combined with physical AI offerings for vision-based inspection, predictive maintenance and robotics-enabled logistics. These offerings deliver tangible benefits, including high fault classification accuracy, significant cycle-time reduction and substantial cost savings.

**Connected and immersive experiences:** HCLTech's connected experience portfolio spans digital thread consulting, real-time location tracking (TraceX), XR at scale (XTERN) and MetaTwin-based industrial metaverse realms. Platforms such as Semiverse for semiconductor facilities, smart modular kitchens and aerospace digital threads illustrate how the company transforms engineering, manufacturing and service journeys into unified, data-rich experiences.

**Caution**

HCLTech should more explicitly link its intelligent operations and immersive experiences to end customers and workforce KPIs, to avoid being perceived primarily as a plant-side optimization and technology provider.


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# Integrated platform and Application Services

## Who Should Read This Section

This report is valuable for providers offering integrated platform and application services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### Chief digital officers

should read this report to understand the developments in the industry, enabling them to choose and partner with the right provider that can transform their digital landscapes. The report allows them to understand the provider's capabilities in terms of their execution competencies, delivery landscape, innovation quotient and strengths/opportunities areas.

### Engineering leaders

must read this report to comprehend the relative strengths and weaknesses of providers offering design and development services in the digital engineering space. The report also helps them understand the capabilities surrounding the use of advanced technologies such as GenAI or agentic AI, proprietary tools and intellectual property assets that could support enterprises in achieving business outcomes and value

### Software development and technology leaders

should read this report to understand the relative positioning of providers and learn how their digital engineering offerings can impact transformation initiatives. The report also details the strengths and opportunities of areas of providers, including connected platforms and ecosystems, personalization and GenAI and agentic AI.


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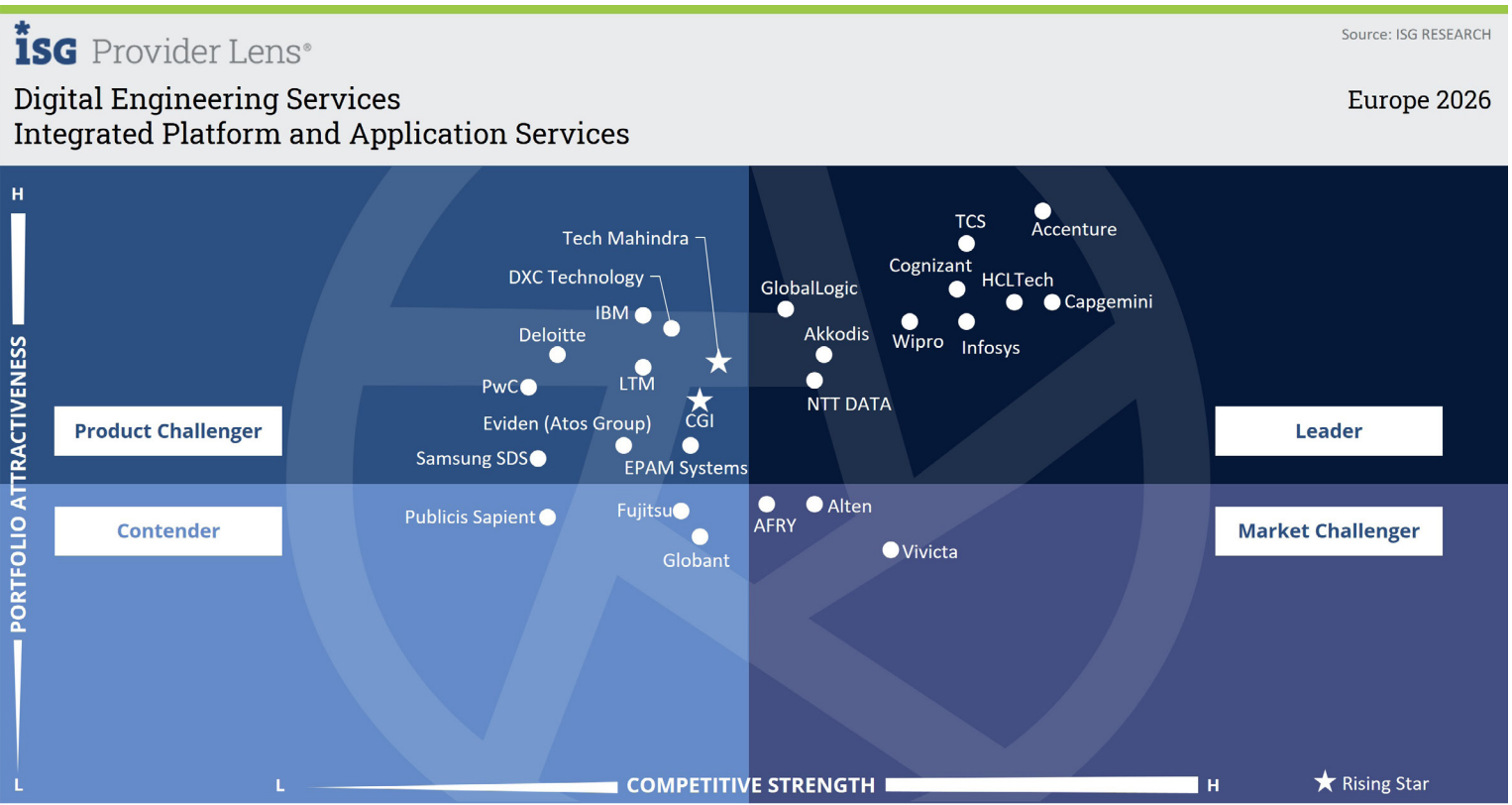


This quadrant assesses providers that **modernize and unify** application and platform ecosystems. Its focus areas include **cloud-native engineering, platform engineering, AI-enabled automation** and secure, composable architectures that improve speed, scalability and reliability.

*P N Srinivasan*


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**Definition**

This quadrant evaluates providers' ability to design, build and manage digital platforms and applications that serve as the foundation for scalable, secure and intelligent enterprise operations, covering lifecycle management for both physical and virtual aspects of the product. The focus is on modular, cloud-native and API-driven architecture that enable rapid innovation, seamless integration and consistent UX.

Providers in this quadrant are expected to deliver platform-as-a-product capabilities, orchestrate digital ecosystems, and support microservices, containerization and behavioral intelligence. The quadrant also covers real-time experience management, multi-platform integration and the use of GenAI for content development, knowledge curation and platform augmentation.

The goal is to assess how providers help enterprises shift from product-centric to platform-centric models, enabling plug-and-play operations, simplified maintenance and enhanced reliability across the value chain.

Eligibility Criteria

1. Using **digital ecosystem orchestration platforms** to build and operate common platforms that reduce complexity and accelerate time to market
2. Delivering **integrated digital technology platforms** that connect systems, hardware and software across multi-disciplinary, cross-functional enterprise environments
3. Having the ability and implement **API strategies, microservices** and **containerized solutions** for scalable platform engineering
4. Using **cloud-native platforms** and **digital-native design** to support smart and connected product development
5. Applying **behavioral intelligence** and **predictive analytics** to real-time data from users and devices
6. Synchronizing **UX** across platforms in real time to ensure consistency and responsiveness as a feedback loop for continuous improvement across the value chain
7. Delivering **ADM capabilities** for platform and app modernization, including DevSecOps and CI/CD
8. Demonstrating experience in **multi-platform integration, code capability** and reusable module development running in parallel and in close sync with physical product platforms to support the iterations and product variants
9. Proven success in using **GenAI** for platform augmentation, content development and intelligent knowledge curation in customer-centric use cases


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**Observations**

Enterprises that aim to modernize and scale digital engineering capabilities continue to grapple with complex legacy applications, siloed platforms and fragmented data ecosystems that slow innovation and increase operational risk. The shift toward cloud-native architectures, platform engineering and product-centric operating models requires partners that can simplify estates while enabling intelligent, secure and composable digital foundations. Providers are increasingly tasked with unifying applications, data, integration frameworks and AI-infused automation into cohesive platforms capable of supporting continuous change. GenAI-driven development acceleration, automated testing, observability and AI-governed security layers are rapidly becoming essential for transformation at scale. Enterprises also expect providers to deliver platform blueprints aligned to regulatory expectations across European markets, while ensuring interoperability across IT, OT and engineering systems.

The Integrated Platform and Application Services quadrant evaluates the ability of providers to deliver cohesive, future-ready platforms that are modular, sovereign-aware and optimized for AI. Providers that stand out are those offering strong LLMOps and MLOps governance, industry-specific accelerators, API-first designs and platform engineering constructs that reduce release cycles, improve reliability and empower teams with consistent, governed digital foundations.

From the 26 companies assessed for this study, 26 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

**Accenture** combines its full-stack cloud, data, AI and security capabilities with strong hyperscaler and SaaS partnerships to build adaptive, AI-centric platforms that can host evolving ecosystems of products and services.

AKKODIS

**Akkodis** combines cloud engineering, data platforms and AI-enabled accelerators to modernize complex enterprise estates into secure, scalable and intelligent digital platforms.

Capgemini

**Capgemini** uses horizontal stack integration (silicon, OS, middleware, applications) and vertical integration (chip to cloud for sectors such as automotive and space) for platform and application modernization. It uses GenAI for deep legacy analysis and modernization, especially in AS/400, COBOL and ERP landscapes.

cognizant

**Cognizant** uses an intellectual property-led, AI-native approach to platform and application services, with Flowsource, Neuro AI Engineering and other platforms underpinning large-scale modernization, multicloud adoption and AI-driven SDLC acceleration.

GlobalLogic
A Hitachi Group Company

**GlobalLogic's** platform engineering capabilities are enhanced by its partnership, cloud-native migration accelerators and AI-assisted modernization utilities. Its scalable integration frameworks help clients transition from legacy middleware toward API-first, cloud-native ecosystems.

HCLTech

**HCLTech** leverages a chip-to-cloud engineering stack, MACH-based architectures and a rich suite of digital engineering platforms to build and modernize planet-scale products and platforms.

Infosys

**Infosys** brings an AI-first, platform-heavy approach to software product and platform engineering via Infosys Topaz, AI Next and an AI-infused SDLC/DevSecOps stack that targets exponential engineering productivity and modernization.


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**NTT DATA's** platform and application services blend reusable intellectual property, domain depth and digital innovation to deliver scalable, client-specific solutions.

**TCS** drives intelligent operations through its Neural Manufacturing framework and Connected Digital Enterprise platform, enabling end-to-end visibility and autonomous decision-making across manufacturing and supply chain ecosystems.

**Wipro** positions its platform and application services around full-stack engineering across cloud, data, AI and security, helping enterprises move from product-centric to platform-centric models and build composable, cloud-native business platforms at internet scale.

**Tech Mahindra (Rising Star)** approaches platform engineering with a strong focus on engineering AI agents, multi-modal ingestion capabilities and deterministic decision frameworks.

**CGI (Rising Star)** excels in scalable, industry-aligned platforms that balance intellectual property reuse with tailored engineering solutions.


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Leader

"HCLTech's chip-to-cloud platform engineering and planet-scale delivery experience make it a strong partner for enterprises rearchitecting products into composable, AI-infused digital platforms."

*P N Srinivasan*

# HCLTech

**Overview**

HCLTech is headquartered in Noida, India. It has more than 223,400 employees worldwide. In FY25, the company generated $13.8 billion in revenue. In Europe, HCLTech advances platform engineering through cloud-native modernization, PLM transformations and multicloud orchestration, supported by centers across Germany, France, the U.K. and the Nordics. The region shows strong traction in composable architectures, secure integration and domain-specific platforms, including semiconductor test modernization, trade surveillance platforms and industrial IoT ecosystems. Accelerators such as PAS, Cloud Bridge and EdgeLITy help shorten release cycles and improve platform resilience.

**Strengths**

**Comprehensive chip-to-cloud stack:** HCLTech integrates silicon engineering, hardware, systems software, cloud/platform engineering and digital experience into a unified chip-to-cloud stack, providing visibility across silicon, hardware, system software, business platforms, and cloud and site reliability engineering (SRE). This enables consistent security, observability, and performance from the device to the experience layer.

**IP suites for modernization and resilience:** Intellectual property suites such as CodeSense, Cloud Bridge, Data Propel, Connected Platform Suite and SRE Suite, together with AI Force-based accelerators, support monolith-to-microservices transformation, cloud-to-cloud and on-premises-to-cloud migration, FinOps, hybrid observability and automated testing. These assets help reduce modernization efforts and improve platform resilience for complex estates.

**Proof points on planet-scale platforms:** HCLTech has engineered and modernized mission-critical platforms for global financial services, healthcare and consumer brands, encompassing digital money transfer, omnichannel banking, connected care and unified commerce. This approach has helped the firm achieve zero-defect cutovers, rapid onboarding, multimarket expansion and double-digit digital revenue growth.

**Caution**

With hyperscalers and SaaS vendors pushing their own modernization toolchains, HCLTech should sharpen how its proprietary intellectual property and chip-to-cloud capabilities deliver differentiated value beyond standard cloud migration and refactoring services.


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# Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of the March and 2026 when the fact check stage is closed for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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


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*Lead Analyst*

## Srinivasan
**Senior Lead Analyst**

Srinivasan PN is a Senior Lead Analyst at ISG Research with over 12 years of experience in the technology and market research industry. He specializes in Digital Engineering Services, the AWS cloud ecosystem, and broader digital transformation trends, with a strong focus on how emerging technologies are reshaping enterprise IT landscapes.

In his current role, Srinivasan leads and co-authors ISG Provider Lens® studies, particularly across Digital Engineering and AWS Ecosystem domains. He is responsible for developing quadrant assessments that provide actionable insights for enterprises and service providers. His work combines deep domain expertise with rigorous primary and secondary research methodologies.

Srinivasan is also an active contributor to ISG's thought leadership, authoring research articles and papers that analyze market developments, technology evolution, and competitive positioning. He works closely with advisors to support enterprise clients through tailored, ad-hoc research engagements, delivering insights across industries and use cases.

Prior to his current role, Srinivasan was involved in end-to-end research delivery, building strong capabilities in both primary and secondary research. His analytical rigor and industry perspective enable him to translate complex technology trends into strategic insights for business and IT stakeholders.


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*Study Sponsor*

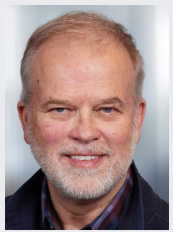
## Iain Fisher

**Director, Research**

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

*IPL Product Owner*



## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens®/ISG Research**

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

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

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

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

For more information, visit isg-one.com.


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ISG Provider Lens®

**APRIL, 2026**

# REPORT: DIGITAL ENGINEERING SERVICES

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