ISG Provider Lens®

Digital Engineering Services (DES) Midsize providers

A research report comparing provider strengths, challenges and competitive differentiators

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CYIENT

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The U.S. is moving from AI pilots to agentic systems, unifying silos to self-healing digital threads

The U.S. digital engineering midsize landscape has reached a strategic inflection point, where organizations are transitioning from fragmented experimental cycles to high-velocity, autonomous ecosystems. In an era that is defined by survival of the smartest, the focus has shifted from tactical digital intervention to foundational elimination of intelligence debt across the silicon-to-cloud continuum. This structural mandate unifies R&D, operations and CX into a single, AI-led digital thread, ensuring that every physical asset and digital platform functions as a self-optimizing growth engine.

The business metric-driven mandate

In 2026, the midsize market in the U.S. is defined by operational agility. Enterprises are architecting digital threads, connecting every business metric from R&D and cost efficiency to warehouse productivity. Leading organizations are those that address these functional silos and transform raw telemetry into self-healing workflows, ensuring that their limited capital delivers maximum, measurable impact across the entire value chain.

U.S. enterprises across sectors are enabling end-to-end traceability through digital threads, ensuring that every automated decision is explainable and secure. As geopolitical tensions strain global supply chains, a renewed domestic push for physical AI and smart manufacturing is emerging. Regulatory shifts are incentivizing the adoption of digital twins not just for design, but also as mandatory dynamic documents for market surveillance and sustainability reporting, effectively merging digital and physical compliance landscapes.

- **From pilot to agentic reality:** The market has moved past isolated AI chatbots to agentic AI autonomous multi-agent systems that plan, act and self-correct, effectively reducing intelligence debt by automating complex, cross-functional workflows.

Scaling **agentic AI** and **digital threads** to unify R&D, operations and CX platforms.

- **The vanishing silo and unified data:** The walls between R&D, operations and CX are breaking down as organizations adopt a single source of truth, replacing fragmented legacy spreadsheets with real-time, event-driven data architectures.
- **Cloud 3.0 and silicon sovereignty:** Cloud-first models have evolved into strategic hybrid ones, where enterprises use public cloud for elasticity. However, they move sensitive, high-frequency AI inference to private edge environments or custom-designed silicon to gain better control over performance and data sovereignty.

Enterprise priorities: The era of value orchestration

In 2026, enterprise priorities have shifted from digitizing the past to architecting the future. The primary investment has transitioned toward value orchestration, which extends beyond deploying new tools to integrating them into a cohesive, self-optimizing system. Midsize enterprises are striving to eliminate intelligence debt (the untapped potential trapped in siloed data) by investing significantly in agentic AI and digital threads. They are moving away from isolated pilots toward a top-down strategy where AI becomes the core infrastructure, managed with the same financial and operational rigor as traditional utilities. The primary goal is to achieve architectural liberation by replacing brittle legacy monoliths with composable, cloud-native platforms that can adapt to market shifts in real-time. Enterprises must strategically invest in and embrace emerging technology trends that unlock new opportunities and drive sustained business outcomes over the long run.

Organizations committing to unrealistic expectations to justify investments eventually experience widespread dissatisfaction with delivered outcomes. Newer initiatives that align stated objectives with achievable outcomes are restoring confidence and strengthening conviction in technology transformations.

In 2026, as AI governance transitions from ethical guidelines to mandatory regulatory compliance, companies are faced with issues related to the log and traceability of automated decisions. Thus, they are cross-training and upskilling the existing staff with the technology skills required to cater to the growing demand for AI-assisted problem solvers. Consequently, the transformation goal for 2026 is the realization of a phygital enterprise: a state where the silicon-to-cloud lifecycle is fully realized and every physical action is mirrored, analyzed and optimized within a dynamic digital twin. IT/OT convergence is another lever, which enables physical assets and digital systems to remain connected, integrated and orchestrated in synch.

Following is an outline of enterprise priorities in the midsize market:

- **Silicon-to-cloud continuum and hardware-software convergence:** Enterprises are prioritizing full-stack sovereignty by co-designing custom silicon with cloud-native software. This approach eliminates performance bottlenecks of generic hardware and enables highly optimized end-to-end use cases in which specialized chips at the edge feed real-time data into large cloud-based digital twins for near-instant global optimization.
- **Dissolving silos through digital threads:** A top transformation goal is the elimination of data islands through the implementation of a universal digital thread. By connecting R&D, manufacturing and post-market services into a single, continuous stream of intelligence, organizations are addressing intelligence debt and ensuring that insights from the physical field automatically inform the next generation of digital design.
- **Platform-led phygital ecosystems:** Platforms that bridge digital and physical assets are garnering investment. Enterprises are no longer building standalone applications but moving toward engineering-integrated platforms that treat factory floors, supply chains and consumer products as nodes within a unified network. This platform-as-the-product strategy ensures that every physical interaction is captured and monetized through a robust, scalable digital backbone.

Empowering the digital evolution

The U.S. digital engineering midsize landscape is characterized by a shift from traditional IT to

high-velocity, specialized innovation. Unlike larger counterparts, midsize providers offer a blend of agility and deep technical intimacy, acting as strategic catalysts for enterprises looking to modernize at scale without the overhead of global providers.

This summary evaluates top-tier providers across three critical pillars of the digital value chain:

- **Augmented design and R&D services:** Leverage AI-driven modeling and simulation to shorten product development lifecycles and enable next-generation hardware and software architectures.
- **Intelligent operations and connected experience:** Fuse IoT, edge computing and data analytics to create seamless, phygital ecosystems that optimize internal efficiencies and elevate customer engagement.
- **Integrated platform and application services:** Build the modern enterprise backbone through cloud-native engineering, microservices and robust API frameworks that ensure long-term scalability and resilience.

In the augmented design and R&D services space, providers are focusing on closing the silicon-to-cloud gap by integrating AI and ML directly into the hardware and software lifecycle.

Simultaneously, the convergence of intelligent operations and integrated platform services is redefining how value is delivered across both digital and physical touchpoints. Midsize specialists are increasingly deploying end-to-end use cases that treat infrastructure as a strategic asset rather than a commodity, facilitating a seamless flow of intelligence from edge devices to enterprise platforms. By architecting platforms that harmonize physical assets with cloud-native applications, these providers enable organizations to eliminate operational friction and respond to market shifts in real-time. This holistic integration ensures that digital transformation is not only an overlay but a foundational capability that powers connected experiences and resilient, platform-led growth.

Provider dynamics: Strategic responses to the intelligence crisis

Midsize service providers in the U.S. have evolved from tactical execution partners to strategic architects of the silicon-to-cloud continuum. To address the pilot fatigue experienced by enterprises, providers are differentiating through architectural liberation, the practice of decoupling legacy monoliths and rebuilding them as modular, event-driven platforms. Their competitive positioning centers on inference economics, helping clients navigate the rising AI compute costs by optimizing model placement across a strategic hybrid infrastructure. By investing in proprietary digital twin libraries and automated test rigs, midsize players are successfully compressing R&D lifecycles and offering a high-touch, agile alternative to the standardized delivery models of larger global integrators.

Partnership strategies have evolved from simple reseller agreements to deep co-innovation ecosystems with specialized AI-native startups and custom silicon designers. Providers are aggressively building agentic workflows and multi-agent AI systems to autonomously manage complex, cross-functional tasks such as supply chain remediation or predictive-to-prescriptive maintenance with the human-in-a-loop paradigm. To address the growing intelligence debt, they are embedding digital threads into every engagement, ensuring data provenance and traceability remain compliant by design. This shift from project-based billing to outcome-driven, platform-led models enables midsize providers to operate as persistent R&D extensions and directly link their engineering efforts to client top-line revenue growth and operational resilience.

- **Sovereign cloud integration:** U.S. enterprises are prioritizing architectures that address data residency and jurisdictional control. By decoupling from generic, black box public clouds and adopting integrated frameworks, they ensure sensitive IP and AI training data remain within regulated, localized boundaries.
- **The rise of physical AI:** Significant investment is flowing into the convergence of robotics, IoT and edge computing, creating phygital environments where digital twins are used as the primary nerve center for real-world autonomous operations.

- **Trust as a service:** Midsize leaders are positioning themselves as guardians of digital provenance by implementing responsible AI frameworks and knowledge graphs that allow every AI-driven conclusion to be traced to its source and meet stringent transparency mandates in 2026.

Strategic Outlook: The Unified Intelligence Era

The future of the U.S. midsize digital engineering space is evolving toward ambient autonomy, where the distinction between physical products and digital intelligence disappears. As the decade progresses, the market will shift from building connected solutions to orchestrating autonomous value chains. Strategic success will no longer be measured by the deployment of cloud platforms but by the ability to reduce intelligence debt across the entire silicon-to-cloud lifecycle. Providers that master inference economics, i.e., minimizing the energy and financial cost of AI while maximizing its real-time edge performance, will emerge as tier 1 partners for modern enterprises.

The trajectory of this market points toward the convergence of digital twins and digital threads into a unified dynamic enterprise nervous system. This evolution will dismantle remaining functional silos, as R&D, manufacturing and CX data flow through a unified, event-driven architecture. For enterprises, the goal is architectural liberation: the ability to swap, scale and evolve digital components without the constraints of legacy technical debt. As regulatory mandates around digital provenance and responsible AI intensify, providers that embed transparency and traceability into the foundational phygital fabric will lead the next wave of industrial and digital transformation.

- **The rise of human-centric agentic ecosystems:** The market is evolving toward a multi-agent economy where autonomous AI systems execute action with humans across the digital and physical environments, from procurement to predictive maintenance, with zero-latency synchronization.
- **Hardware-defined software:** Future engineering will drive reverse convergence, where software requirements define custom silicon architecture. This silicon-to-cloud integration will support high-performance end-to-end use cases in autonomous transport and remote surgical robotics.
- **From platforms to dynamic systems:** The next frontier is the self-healing enterprise, where integrated platforms leverage continuous feedback loops from digital twins to automatically reconfigure operations in response to geopolitical shifts or supply chain disruptions.

In 2026, the U.S. midsize market will have transitioned from a digital follower stance to a value-native leader. Facing tighter capital constraints, these agile organizations are bypassing legacy transitions of the past decade. Instead, they are adopting agentic AI and cloud-native architectures as key equalizers. By focusing on modularity through MACH-aligned (microservices, API-first, cloud-native and headless) ecosystems, these firms are industrializing innovation across the product lifecycle, effectively competing on speed and precision rather than sheer scale.

The current landscape is defined by the convergence of IT, OT and ET. Midsize leaders are leveraging digital thread platforms to unify siloed data from R&D labs to the factory floor and the end customer. This integration is now a survival mandate, as clean core strategies and model-based systems engineering (MBSE) enable these companies to reduce technical debt while scaling hyperpersonalized experiences. This report outlines and establishes how midsize providers are leveraging these digital tools to drive predictive R&D, self-healing operations and resilient enterprise platforms in the current fiscal year.

2026 marks a defining shift from digital intervention as enabler to autonomous orchestration as the foundational architect of the silicon-to-cloud enterprise.

Provider Positioning

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	Augmented Design and R&D Services	Intelligent Operations and Connected Experiences	Integrated Platform and Application Services
Accion Labs	Product Challenger	Product Challenger	Leader
ACL Digital	Product Challenger	Market Challenger	Market Challenger
Altimetrik	Product Challenger	Not In	Leader
Apexon	Leader	Leader	Leader
Ascendion	Not In	Not In	Leader
Bahwan Cybertek	Contender	Contender	Contender
Birlasoft	Leader	Leader	Not In
Bosch SDS	Leader	Leader	Leader
Coforge	Leader	Leader	Leader
Cyient	Leader	Leader	Leader

Provider Positioning

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	Augmented Design and R&D Services	Intelligent Operations and Connected Experiences	Integrated Platform and Application Services
eInfochips	Leader	Rising Star ★	Product Challenger
Happiest Minds	Product Challenger	Product Challenger	Product Challenger
Hexaware	Leader	Not In	Leader
IndX	Not In	Market Challenger	Not In
Infinite Uptime	Not In	Contender	Contender
InfoVision	Contender	Product Challenger	Contender
Innominds	Contender	Product Challenger	Contender
Innover Digital	Contender	Contender	Contender
Intellias	Contender	Contender	Not In
ITC Infotech	Rising Star ★	Product Challenger	Rising Star ★

Provider Positioning

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	Augmented Design and R&D Services	Intelligent Operations and Connected Experiences	Integrated Platform and Application Services
KPIT	Product Challenger	Product Challenger	Product Challenger
LTTS	Leader	Leader	Leader
Mastek	Not In	Not In	Product Challenger
Milestone Tech	Contender	Not In	Not In
Mindsprint	Not In	Product Challenger	Product Challenger
Motherson Technology	Product Challenger	Product Challenger	Not In
Movate	Not In	Product Challenger	Not In
Nagarro	Product Challenger	Contender	Product Challenger
Ness Digital Engineering	Not In	Not In	Product Challenger
Persistent Systems	Leader	Leader	Leader

Provider Positioning

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	Augmented Design and R&D Services	Intelligent Operations and Connected Experiences	Integrated Platform and Application Services
Prodapt	Contender	Contender	Market Challenger
Quest Global	Leader	Leader	Leader
R Systems	Not In	Not In	Product Challenger
Randstad Digital	Product Challenger	Product Challenger	Product Challenger
Simform	Contender	Market Challenger	Contender
Softdel	Product Challenger	Product Challenger	Product Challenger
Straive Digital	Not In	Contender	Not In
Sutherland	Market Challenger	Leader	Market Challenger
Tata Elxsi	Leader	Leader	Leader
TechWave	Not In	Not In	Contender

Provider Positioning

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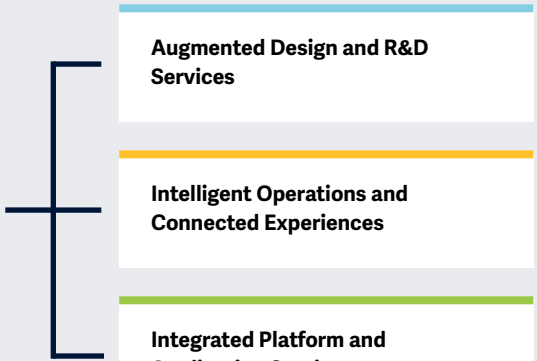
	Augmented Design and R&D Services	Intelligent Operations and Connected Experiences	Integrated Platform and Application Services
TO THE NEW	Contender	Not In	Contender
UST	Leader	Leader	Leader
Virtusa	Product Challenger	Product Challenger	Leader
VVDN Technologies	Market Challenger	Contender	Contender
Xoriant	Product Challenger	Product Challenger	Product Challenger
Zensar Technologies	Leader	Leader	Leader

Key focus areas of the Digital Engineering Services **(DES) Midsize** 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 midsize 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.

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).

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.

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 the U.S. 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 service depth and market presence. It focuses on generative design and model-based system engineering (MBSE) to enhance ideation, simulation and virtual validation, using Design Failure Mode and Effects Analysis (DFMEA), AR and VR prototyping and GenAI/LLMs to automate design and early testing for quality, sustainability and speed.

Chief digital officers

should read this report to align investments with AI-enabled engineering. The report outlines how GenAI, vision language models (VLMs) and digital threads reduce time-to-market, strengthen early QA and support responsible design. The report helps prioritize platform choices, such as PLM and application lifecycle management (ALM), and partner ecosystems that scale model-based engineering while meeting sustainability and compliance goals across complex programs.

R&D leaders

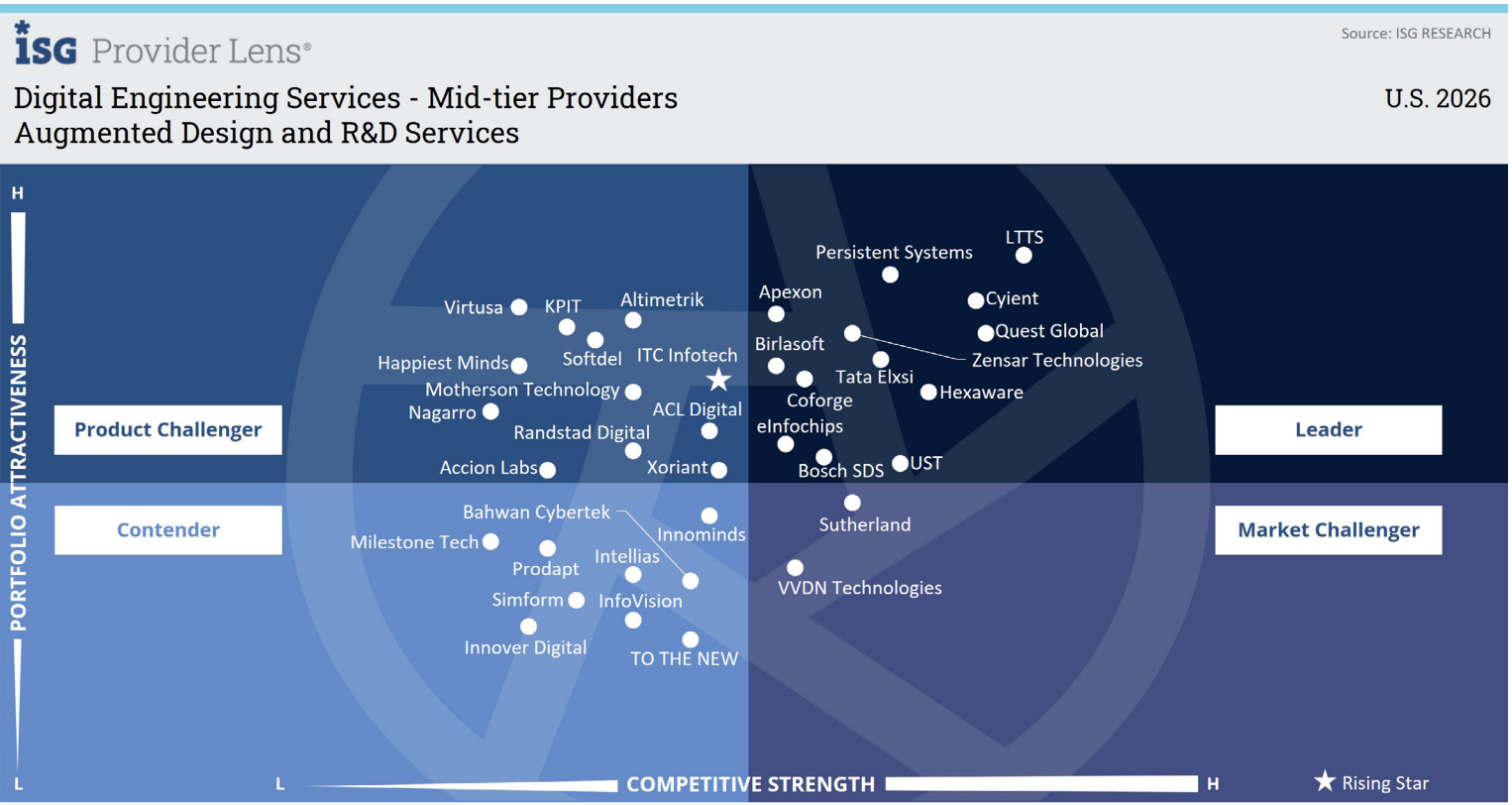
should read this report for guidance on adopting MBSE, DFMEA and large-scale simulation. The report covers generative design workflows, additive manufacturing for rapid iterations and autonomous test benches using digital twins. It outlines how to coordinate toolchains, leverage hyperscaler stacks and codify design rules to facilitate efficient collaboration between multidisciplinary teams on validated and manufacturable concepts.

Product and design leaders

should read this report to embed persona-led UX, behavioral intelligence and hyperpersonalization into physical and digital products. The report covers journey mapping, industrial and service design, and virtual prototyping with AR, VR and MR, connecting verification and validation (V&V) outcomes to experience KPIs. It shows how GenAI-driven content and assistants (avatars) refine concepts and minimize rework before the engineering freeze.

QA and V&V leaders

should read this report to identify approaches for virtual validation, GenAI-driven extreme test case generation and continuous verification of design outputs and validation results against domain standards. The report covers simulation fidelity, DFMEA traceability and automated documentation to help teams establish safety, reliability and compliance, reduce defect leakage and institutionalize audit evidence across regulated industries.



This quadrant evaluates providers using **AI-native engineering** and **digital twins** to industrialize the R&D lifecycle. It highlights the shift toward **autonomous simulation** and silicon-to-service speed for innovation.

Shirish Kulkarni

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 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**

Observations

Midsize firms in the U.S. are shifting from traditional product lifecycle management (PLM) to AI-native R&D, aiming for high-velocity discovery. Where large enterprises might spend years building digital twins of massive, monolithic systems, midsize leaders are deploying modular, domain-specific AI agents to simulate product performance.

In addition to the client-funded projects to derisk new technology, forward-thinking midsize firms are using internal innovation labs and positioning themselves as the zeroth customer for the digitally augmented R&D operations. Derisking complex industrial concepts in-house differentiates their offerings with a first-time-right assurance.

Midsize players are standardizing on MBSE and digital twin platforms. This approach allows for a first-time-right design rate that was previously impossible, significantly reducing product development cycle time through virtual-first validation.

To be ahead in this engineering orchestration race, end-to-end streamlining of workflows and elimination of functional silos are imperatives. Critical success factors include a unified approach to platformize digital and physical systems and well-organized and orchestrated business use cases targeting key business metrics.

From the 46 companies assessed for this study, 36 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon specializes in digital-first engineering, using AI-augmented workflows to accelerate R&D and high-fidelity prototyping.

birlasoft

Birlasoft combines deep domain manufacturing heritage with digital thread expertise to accelerate product innovation, specializing in e-PLM, multi-CAD migrations and sustainable R&D engineering.

Bosch SDS

Bosch SDS accelerates the product innovation cycle by combining the strong expertise in engineering, augmented with industrial AI for next-gen product development.

Coforge

Coforge is a global digital provider specializing in product engineering and AI-augmented R&D, focused on safety-critical systems in diverse industry verticals.

CYIENT

Cyient's strength lies in intelligent engineering, specializing in design-build-maintain services for safety-critical industries.

eInfochips An Arrow Company

eInfochips accelerates R&D through a silicon-to-software lens, leveraging Arrow's vast supply chain and proprietary intellectual property to deliver high-performance, complex hardware and embedded systems.

HEXAWARE

Hexaware is an IT provider specializing in AI-first product engineering. It uses rapid prototyping and agentic AI to accelerate R&D and modernize safety-critical industrial software.

L&T Technology Services

LTTS is a global pure-play ER&D leader that bridges mechanical and digital engineering and leverages AI-driven frameworks such as PLxAI to accelerate product lifecycles, using its own innovation labs to deliver high-fidelity virtual design and simulation.

Persistent

Persistent Systems is a digital engineering specialist that combines software product DNA with AI to accelerate R&D and modernize core products for global ISVs and enterprises.

Quest Global focuses strongly on pure-play independent engineering, providing specialized alternatives to larger IT generalists, delivering deep domain expertise in the engineering space.

Tata Elxsi

Tata Elxsi delivers comprehensive digital design R&D frameworks that enable products with connectivity, electrification and autonomous features.

UST is an orchestrator of the silicon-to-software continuum. It combines human-centered design with rapid digital engineering to transform static R&D into autonomous value loops that evolve through real-time AI and IoT data.

Zensar Technologies delivers experience-led engineering, focusing on AI, IoT and next-gen R&D to co-innovate and prototype high-impact digital products for global enterprises.

ITC Infotech (Rising Star)

ITC Infotech (Rising Star) accelerates R&D through a digital thread approach, merging advanced PLM expertise with AI to shorten product lifecycles and enhance design-to-manufacturing synergy.

Leader

"Cyient has a strong position in ER&D and digital engineering, leveraging its deep domain expertise across various industry verticals."

Shirish Kulkarni

Cyient

Overview

Cyient is headquartered in Hyderabad, India. It has more than 15,000 employees across more than 30 countries. In FY26, the company generated $820.8 million in revenue. In the U.S. digital engineering services market, Cyient integrates hardware and software through its silicon-to-service model, utilizing more than 50 CoEs and 35 innovation studios to deliver advanced digital thread and digital twin solutions. The company maintains a broad global footprint with a focus on high-complexity engineering offerings.

Strengths

Silicon-to-service leadership: Cyient's engineering heritage allows it to manage the entire product development life cycle (PDLC), from initial concept and complex ASIC design through production and long-term aftermarket support. By bridging physical hardware and software, it delivers intelligent engineering for safety-critical industries. Backed by a strong patent portfolio and a robust global delivery model, Cyient brings the technical depth required to execute in high-complexity, mission-critical environments.

AI-driven R&D acceleration: Through its EnGeneer Center of Excellence, Cyient leverages GenAI to significantly compress R&D cycles and automate engineering workflows. This approach is reinforced by industry-specific proprietary platforms such as Cyfast, which streamlines medical-device compliance, and CyArc, which accelerates regulatory processes. These platforms allow global OEMs to navigate stringent certification processes more efficiently.

Digital convergence: Cyient augments R&D through advanced AR, VR, MR and high-fidelity digital twins. Its AR/VR View applications enable virtual prototyping and real-time remote collaboration, allowing engineers to visualize and test complex systems, such as aerospace engines and medical diagnostic equipment, before physical production begins. This approach significantly reduces time-to-market and R&D costs.

Caution

Cyient should diversify its digital engineering services into adjacent industries to cross-leverage its strong aerospace and defense foothold. This would help broaden growth opportunities in the competitive U.S. market.

Intelligent Operations and Connected Experiences

Who Should Read This Section

This report is valuable for service providers offering intelligent operations and connected experiences in the U.S. 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. These offerings in this quadrant include operational intelligence and experience orchestration capabilities across Industry 4.0/5.0, IIoT, edge computing and digital twins, using analytics, VoC and AI to enable predictive maintenance and adaptability.

COOs and operations leaders

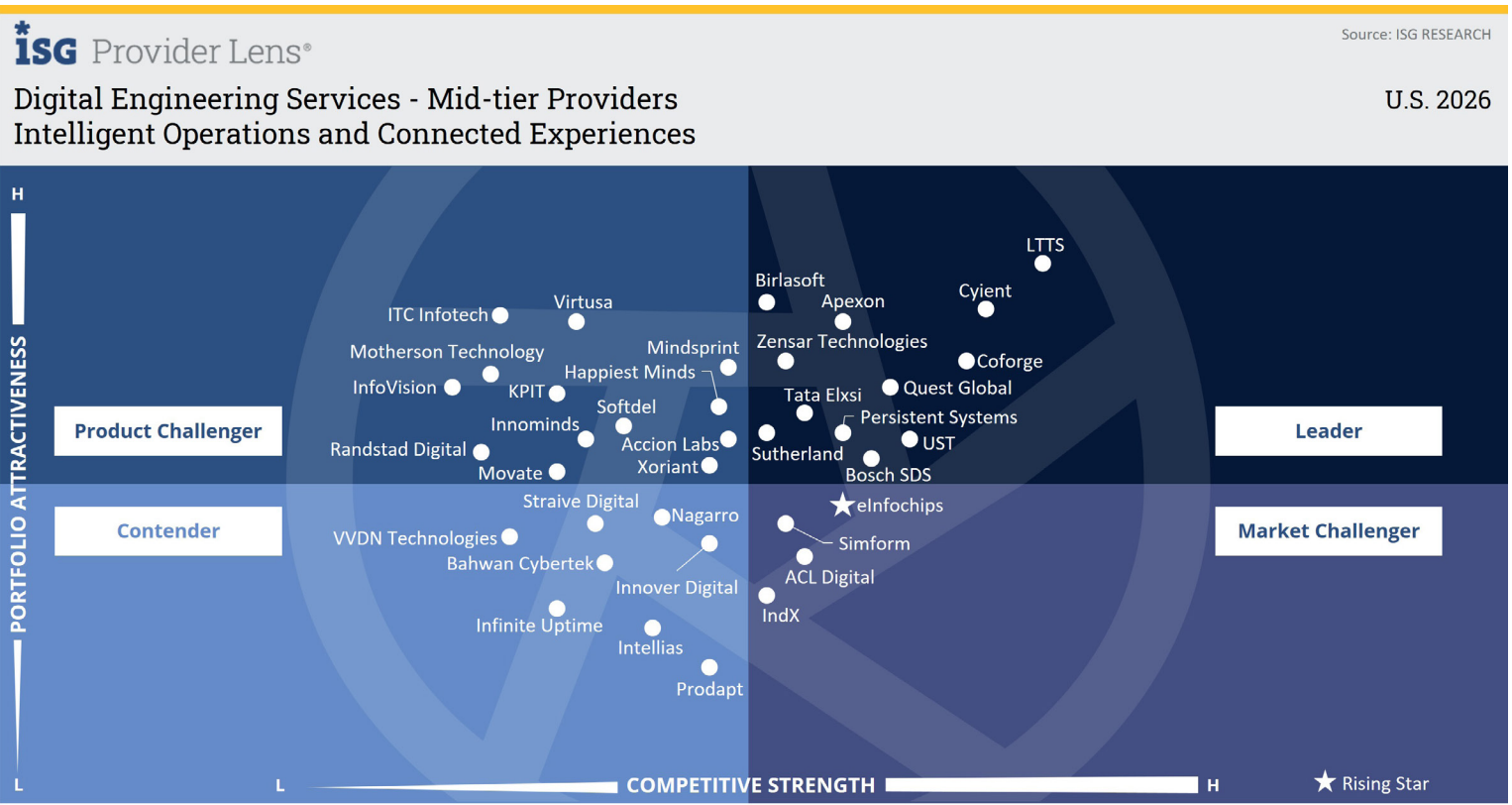
should read this report to connect shop-floor telemetry to service operations via digital threads. The report shows how smart factories, adaptive supply chains and asset performance management utilize AI and ML to predict failures, optimize throughput and orchestrate maintenance. Guidance spans OT readiness, resilience and governance to achieve controllable, scalable operations aligned with Industry 5.0 human-in-the-loop principles.

CX and experience leaders

should read this report to learn how to unify UX, CX and DX through real-time feedback loops, VoC analytics and hyperpersonalized support. It explains experience orchestration with digital avatars and conversational AI, GenAI-driven knowledge curation and content generation and how to connect satisfaction, quality and field outcomes to product telemetry, closing the loop between customer signals and operational improvements.

OT and plant leaders

should read this report to gain practical insights into IT, OT and ET integration, secure data flows and workforce enablement. The report covers edge architectures, AR- and VR-assisted remote support and safety and ESG considerations. It outlines how to standardize device onboarding, enable condition monitoring and run remote diagnostics to minimize downtime while ensuring compliance across diverse brownfield and greenfield environments.



This quadrant evaluates digital levers on operations and CX via **virtual Gemba for self-healing systems,** featuring providers **bridging physical and digital worlds** through anticipatory intelligence to deliver **hyperpersonalized user journeys.**

Shirish Kulkarni

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

Observations

This quadrant monitors the fundamental collapse of the silos separating business operations and UX. In 2026, the U.S. midsize market is moving beyond predictive maintenance toward anticipatory intelligence. We see a notable change in provider positioning: firms that have mastered the virtual Gemba by integrating AR and VR with real-time operational data are gaining significant ground over those still focused on traditional ITSM.

Strategic movements in the experience design space have continued, with providers acquiring specialized affective AI-related capabilities to better sense and respond to human emotion in digital-physical environments. This shift has redefined the connected experience from a transactional interface to a continuous, empathetic value loop. Providers are increasingly evaluated based on their ability to deliver XLAs that link operational uptime directly to employee productivity and customer sentiment. Leading providers are those that have successfully moved end-to-end operations to the sovereign cloud environments, enabling persistent virtual collaborations and remote diagnostics that eliminate geographical constraints for enterprises.

From the 46 companies assessed for this study, 37 qualified for this quadrant, with 12 being Leaders and one Rising Star.

Apexon

Apexon delivers autonomous operations through its AgentRise™ platform, converging AI and data to create intelligent, responsive CX and EX.

birlasoft

Birlasoft delivers AI-driven operational resilience solutions that unify supply chain visibility with immersive, AR-VR-enhanced stakeholder experiences.

Bosch SDS

Bosch SDS converges AI, IoT and domain knowledge to deliver autonomous operations and smarter digital experiences that bridge the physical and digital worlds.

Coforge

Coforge's strength lies in delivering intelligent automation and CX through its branded Quasar AI ecosystem.

CYIENT

Cyient enables smart operations by converging IT, OT and geospatial data to optimize manufacturing plants, utility networks and autonomous mobility ecosystems globally.

LTTS, as a global ER&D provider, enables intelligent operations by converging IT, OT and IoT. It leverages AI, digital twins and edge intelligence to transform manufacturing and infrastructure into connected, resilient and autonomous ecosystems.

Persistent

Persistent Systems delivers intelligent IT operations and CX transformation, using AI-led automation to ensure business continuity and personalized, always-on customer engagement.

Quest global

Quest Global serves as an orchestrator of intelligent operations, specializing in closing the traditional IT/OT divide for industrial OEMs by integrating real-time shop-floor data with enterprise-level intelligence.

SUTHERLAND

With a strong focus on agentic operations, **Sutherland** unifies AI-powered agent assist, predictive diagnostics and omnichannel orchestration to deliver autonomous, self-healing CX.

Tata Elxsi

Tata Elxsi drives autonomous operations by converging AI and IoT to deliver predictive maintenance and hyperpersonalized consumer journeys.

UST delivers sentient operations, using GenAI and IoT to create self-healing supply chains and provides digital CX through hyperpersonalized customer journeys.

Zensar Technologies optimizes enterprise estates using ZenseAI and EvolveOps, orchestrating autonomous IT and business operations that prioritize self-healing and superior customer engagement.

eInfochips (Rising Star) delivers smarter digital operations by unifying edge intelligence with cloud-native monitoring. It also specializes in autonomous robotics and self-diagnostic IoT ecosystems.

Leader

"As a leader in Industry 4.0 and sustainability, Cyient integrates digital threads across operations and IoT to drive operational excellence."

Shirish Kulkarni

Cyient

Overview

Cyient is headquartered in Hyderabad, India. It has more than 15,000 employees across more than 30 countries. In FY26, the company generated $820.8 million in revenue. In the U.S., Cyient's operations focus on *designing intelligent operations together*, emphasizing sustainability and autonomous operations through its IntelliCyient suite. Cyient helps asset-intensive industries achieve net zero goals with energy storage and carbon capture solutions. Additionally, its EIP based agentic flows, quality digital thread and KPI linked consulting accelerate OT/IT convergence and operational value realization.

Strengths

Operations intelligence powerhouse: Cyient delivers visibility into physical infrastructure by leveraging its deep expertise in operations data. Its proprietary offerings, Vismon™ (an AI-powered network management tool) and CyPlaNet (an automated fiber expansion framework), enable telecom and utility providers to significantly reduce network operations time. By integrating satellite imagery, LiDAR and sensor data, Cyient creates high-fidelity digital maps that enable autonomous network planning and real-time fault detection.

Consulting-driven service redesign: Cyient integrates as-is and to-be modeling, KPI-linked transformation and forward-deployed engineers to accelerate operational re-architecture. Data cleaning accelerators, catalog intelligence and workflow templates reduce integration effort, enabling U.S. clients to rationalize aftermarket portfolios and scale production-grade AI into service operations with consistent value realization.

Unified physical-to-digital bridge: Cyient's core differentiator is its ability to create a seamless *system of systems* by integrating real-time shop-floor IoT data with enterprise ERP and SCM platforms. This bridge provides a single pane of glass for global supply chains and smart cities, enabling data-driven decision-making at scale.

Caution

Cyient should further standardize and package its platform based delivery solutions to balance deep customization with scalability. Strengthening repeatable deployment blueprints will help reduce integration effort, accelerate timelines and ensure consistent outcomes.

Integrated platform and Application Services

Who Should Read This Section

This report is valuable for providers offering integrated platform and application services in the U.S. 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.

CIOs, CTOs and platform owners

should read this report to formulate platformization strategies that reduce complexity and increase reliability. The report discusses ecosystem orchestration, API governance, multicloud options and operating models for platform engineering. The guidance helps select partners that deliver common platforms, reusable modules and telemetry-driven service-level objectives (SLOs), aligning product roadmaps with secure, scalable digital foundations.

AppDev and application development and maintenance (ADM) leaders

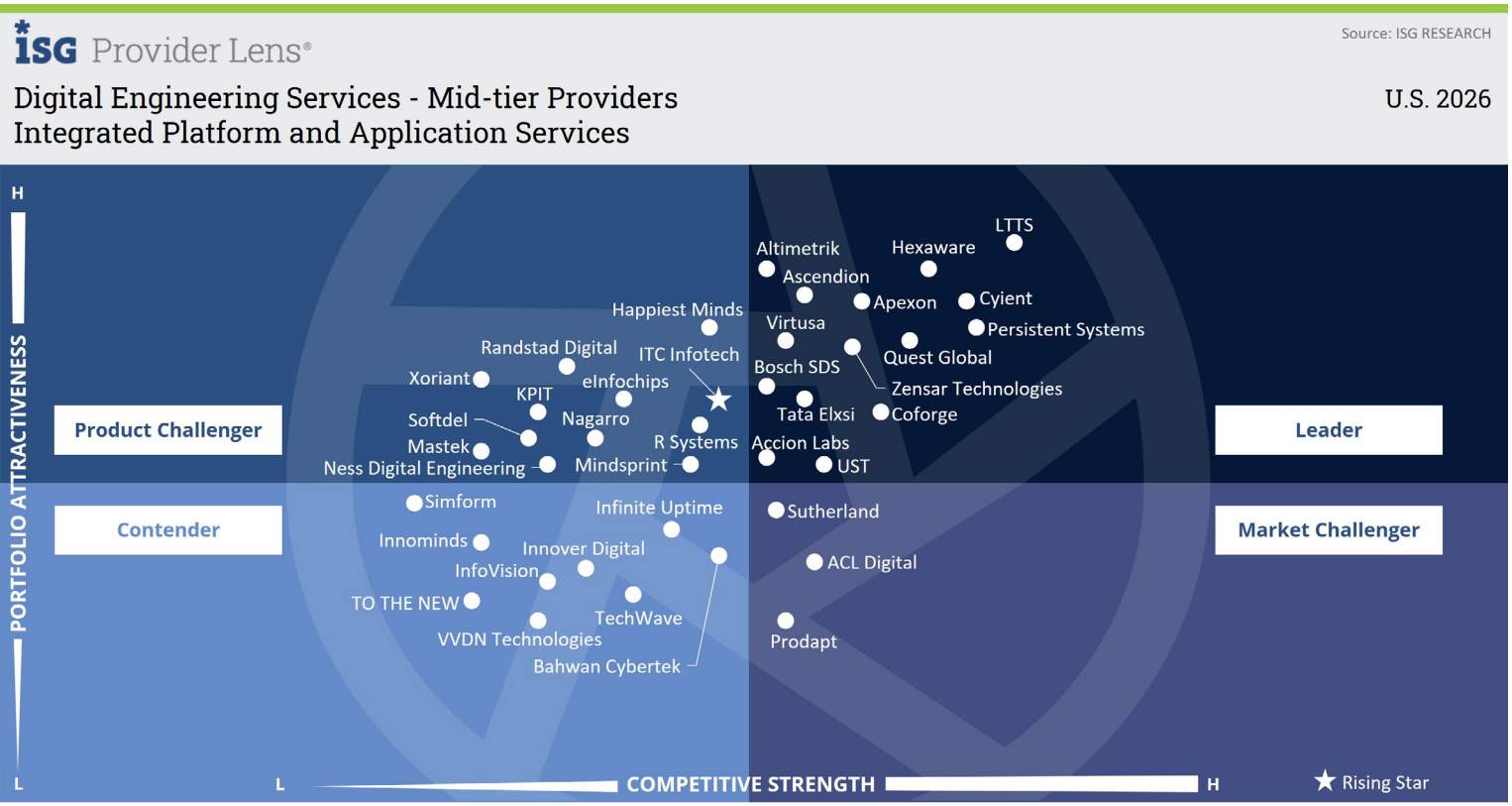
should read this report to accelerate modernization with CI/CD, infrastructure as code and refactoring strategies. The report outlines code capabilities, reusable components and parallel development aligned to product platform variants. It covers backlog hygiene, value stream metrics and developer experience, helping teams deliver secure, reliable features without compromising velocity.

Enterprise architects

should read this report to gain insights into composable architectures, event-driven integration and containerization. The report covers domain APIs, policy as code and service mesh to standardize interoperability across physical and digital product platforms. It also shows how behavioral intelligence integrates user and device signals into continuous improvement loops, ensuring consistent UX across channels in near real time.

Security and DevSecOps leaders

should read this report to identify controls for GenAI augmentation, supply chain security and runtime protection. The report outlines how to integrate threat modeling, software bill of materials (SBOMs), policy gates and secrets management into pipelines, while applying zero trust patterns and provenance checks across microservices. It helps establish guardrails that enable rapid innovation while maintaining compliance in regulated environments.



This quadrant assesses the providers' ability to build a platform of virtual and physical architectures with **agent-native infrastructure.** It evaluates legacy modernization abilities using **self-refactoring code** to ensure platform-led enterprise agility.

Shirish Kulkarni

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

Observations

The Integrated Platform and Application Services quadrant in 2026 notes that U.S. midsize enterprises are increasingly seeking out-of-the-box architectures. As organizations struggle with the prohibitive costs of legacy technical debt, provider positioning is now dictated by the ability to offer self-refactoring application environments. We observe that providers that have invested in agent-native infrastructure are displacing traditional cloud-migration specialists.

The year has been marked by capabilities focused on sovereign cloud platforms and automated code remediation tools, reflecting the need for hyper-secure and elastic foundations for agentic AI. Compared to last year, the providers ahead of the curve have demonstrated internal first-customer benefits, quantifying in USD how platform-led modernization has reduced their own operating costs while showcasing their revenue impact externally. The distinction between application development and infrastructure management has blurred, giving rise to sovereign AI fabrics that enable U.S. enterprises to move workloads autonomously across hybrid environments based on real-time regulatory and cost triggers.

From the 46 companies assessed for this study, 39 qualified for this quadrant, with 15 being Leaders and one Rising Star.

Accion Labs

Accion Labs is an innovation-first engineering partner specializing in rapid prototyping and modernizing legacy product stacks using AI-integrated software development lifecycle (SDLC) practices.

Altimetrik

Altimetrik is advancing to be a modernization powerhouse that re-architects legacy systems into clean core AI-native platforms using automated accelerators and a practitioner-led engineering approach.

Apexon

Apexon modernizes legacy portfolios into AI-native platforms, specializing in cloud-native development and high-compliance application services for regulated industries.

Ascendion

Ascendion is striving to become a modernization specialist that replatforms legacy systems into agentic AI-native ecosystems, using the AAVA™ platform to ensure transparency, security and high-velocity code migration.

Bosch SDS

Bosch SDS modernizes enterprise structure into AI-native platforms, specializing in cloud-to-edge connectivity, cybersecurity and ERP-driven operational agility.

Coforge

Coforge provides AI-native cloud-modernization and platform engineering, specializing in low-code/no-code and cloud-native transformations for the global mid-market.

CYIENT

Cyient provides AI-native platform engineering and application modernization, specializing in migrating legacy systems to cloud-native, software-defined architectures for the industrial enterprise.

HEXAWARE

Hexaware integrated platform and application services focus on RapidX-led modernization, strong low/no-code depth, scaled cloud-native delivery and AMS–engineering convergence.

LTTS, as a global ER&D provider, bridges the gap between hardware and software. It specializes in cloud-native application development, platform engineering and AI-led digital integration, helping enterprises modernize legacy systems into scalable digital ecosystems.

Persistent Systems builds and modernizes software-defined platforms, specializing in legacy-to-cloud migration and data monetization for high-compliance industries.

Quest Global specializes in integrated software platforms that unify hardware, embedded systems and cloud layers.

Tata Elxsi

Tata Elxsi modernizes legacy estates into AI-native platforms, specializing in cloud-based connected care and high-compliance software.

UST is strongly driving modernization as a focus that replatforms legacy cores into AI-first ecosystems for secure and scalable growth using digital frameworks.

Virtusa

Virtusa is quickly becoming a platform engineering specialist that modernizes legacy systems into future-ready digital cores using AI-augmented tools, MACH architectures and a clean core cloud strategy.

By fusing its product engineering culture with a deep-rooted expertise in legacy systems, **Zensar Technologies** serves as a bridge for enterprises looking to transition from reactive IT maintenance to becoming proactive, AI-native organizations.

ITC Infotech (Rising Star)

ITC Infotech (Rising Star) is aiming at being a modernization specialist, replatforming legacy cores into AI-native digital foundations. It employs a clean core strategy to reduce technical debt and accelerate innovation and industrial-grade business agility.

Leader

"Cyient extensively leverages GenAI platforms and analytics to extract insights and deliver robust, autonomous software-defined products, solutions and services."

Shirish Kulkarni

Cyient

Overview

Cyient is headquartered in Hyderabad, India. It has more than 15,000 employees across over 30 countries. In FY26, the company generated $820.8 million in revenue. As of FY26, the company co-innovated with over 300 global customers and maintained a considerable workforce for its digital engineering and technology division. Cyient operates through its Digital, Engineering & Technology (DET) segment in the U.S. intelligent platforms space, transforming traditional engineering companies into digital enterprises. It adopts a cloud-to-edge strategy to build autonomous platforms that sense, learn and adapt in real time.

Strengths

Product-to-platform monetization: Cyient empowers its clients to shift away from selling products to offering data-driven platform services through its Digital Data Foundation and CyientifIQ platforms. These tools allow rapid deployment of product-to-platform strategies, enabling organizations to monetize vast datasets through advanced analytics and AI. Cyient also embeds edge intelligence and 5G connectivity directly into client application suites, resulting in faster time-to-market for digital offerings, recurring revenue models and improved monetization of connected products and services.

AI-native modernization: Cyient distinguishes itself through a strong focus on software-defined excellence and automated legacy migration. Its proprietary Coddy platform leverages advanced GenAI and ML technologies to automate the refactoring of legacy codebases into modern, cloud-native architectures. By significantly reducing technical debt and manual intervention, Cyient enables enterprises to accelerate their digital transformation.

High-compliance application engineering: The firm's ability to engineer mission-critical applications in highly regulated environments, such as SaMD and autonomous mobility platforms, is a critical differentiator. Cyient's deep domain expertise in medical electronics and automotive ACES (autonomous, connected, electric and shared) allows it to build integrated platforms that adhere to stringent global safety and security standards.

Caution

As a strong design-heavy engineering firm, Cyient must continue to build its edge in the enterprise application space by strengthening end-to-end delivery, platform-led capabilities and industry-specific solutions to compete against conventional IT service providers.

Appendix

The ISG Provider Lens® 2026 – Digital Engineering Services (DES) Midsize providers study analyzes the relevant providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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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 May 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Digital Engineering Services (DES) Midsize providers 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

Lead Analyst

Shirish Kulkarni
Senior Lead Analyst

Shirish Kulkarni brings in a vast and well-rounded experience of 30 years from Global Corporations with the DNA of leveraging IT for Business Transformation. Last 7+ years, he has been sharing his entrepreneurial learnings for Small and Medium Businesses to better business effectiveness and efficiencies. He has a unique blend of experience covering contributions in Consultancy & Advisory, Innovation & Transformation, R&D center of an Indian automaker, customer management, and support, exposure to the end-to-end product development lifecycle from renowned organizations from inception to stabilization, and finally inward / outward-looking experience in a services organization.

He has been instrumental in driving a global domain practice in the space of Manufacturing Excellence by identifying it as a white space in comparison with the competition and creating the whole of GTM (Go-To-Market) Strategy with the thought process of offerings, solutions to success stories on the Global Landscape with close interaction with the Research & Advisory firms. He specializes in the areas of Business Innovation & Technology changes, possessing an ability - to build a Larger Picture by Connecting Dots, to drive changes from Concept to Realization, to work on Inner Conviction, to question the Status-Quo, aiming to optimize Business Operations.

Research Analyst

Sachin Kamgonda Birajdar
Senior Research Analyst

Sachin Birajdar joined ISG as a Senior Research Analyst in November 2024. Based in Pune, India, he holds an MBA in Marketing from Savitribai Phule Pune University. Sachin brings over five years of experience in market research, competitive intelligence, and strategic advisory, specializing in the ICT domain. His expertise spans both qualitative and quantitative research, covering technology areas such as information security, imaging and print solutions, and digital transformation technologies.

At ISG, Sachin contributes to the Digital Engineering Services study, where he focuses on analyzing market trends, provider capabilities, and innovation strategies that drive next-generation engineering and platform services. He has a proven track record of conducting end-to-end research projects, from client briefings and primary research to data modeling and insight-driven reporting.

Prior to joining ISG, Sachin worked at IDC (International Data Corporation) and Quadrant Knowledge Solutions, where he led multiple research and consulting projects, delivering market insights that supported clients' go-to-market

Study Sponsor

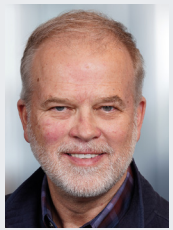
Iain Fisher

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.

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. 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 and cities) and higher education institutions. Visit: Public Sector.

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ISG

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

For more information, visit isg-one.com.

ISG Provider Lens®

MAY, 2026

REPORT: DIGITAL ENGINEERING SERVICES (DES) MIDSIZE PROVIDERS