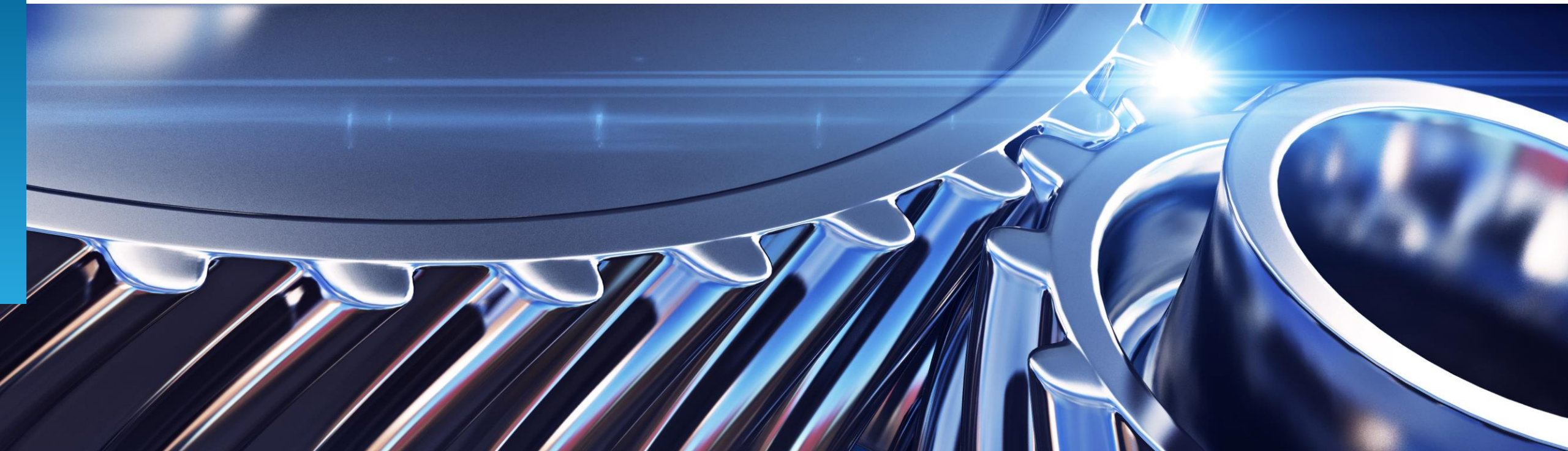


Industry 4.0 Services PEAK Matrix[®] Assessment 2020: the Transformational Leap in Cyber-physical Convergence

September 2020: Complimentary Abstract / Table of Contents



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- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background and introduction of the research

Industry 4.0 is the latest phase in the industrial revolution and a technology-intensive transformation of cyber and physical systems and their convergence. This transformation is characterized by advanced and modern themes of interconnectivity, digitalization, and automation and is made possible through technological developments in multiple fields, including Internet of Things (IoT), additive manufacturing, cloud computing, edge computing, analytics, robotics, cybersecurity, Artificial Intelligence (AI), and Machine Learning (ML). Enterprise adoption of Industry 4.0 is experiencing significant traction globally owing to the multitude of benefits that it brings for enterprises, including increased flexibility, visibility, quality, efficiency, and control. COVID-19 has further amplified the need for its adoption as it helps industrial setups enhance resilience.

Engineering service providers are playing a critical role in accelerating enterprise adoption of Industry 4.0 by offering a wide range of services in this domain. Industry 4.0 service offerings span four service functions, which broadly capture the Industry 4.0 services value chain:

- Consulting and design
- Development and Verification and Validation (V&V)
- Deployment and System Integration (SI)
- Managed services and support

This report examines the dynamics of global Industry 4.0 services and presents PEAK Matrix Assessments of 18 leading service providers associated with Industry 4.0 services. The report features these providers on five PEAK Matrix® Assessments, one for the overall Industry 4.0 services and one each for the four service functions mentioned above.

Scope of this report:



Geography
Global



Services
Industry 4.0 services
Consulting and design | Development and V&V
Deployment and SI | Managed services and support



Service providers
18 leading broad-based and pure-play engineering service providers

Overview and abbreviated summary of key messages

This report examines the global Industry 4.0 services landscape and assesses 18 engineering service providers associated with Industry 4.0 services. The report also assesses these service providers on each Industry 4.0 service function – design and consulting, development and V&V, deployment and SI, and managed services and support. It focuses on service providers' position, assessment of their delivery capabilities and market impact, and their key strengths and areas of improvement.

Some of the findings in this report, among others, are:

Service provider position and delivery capability

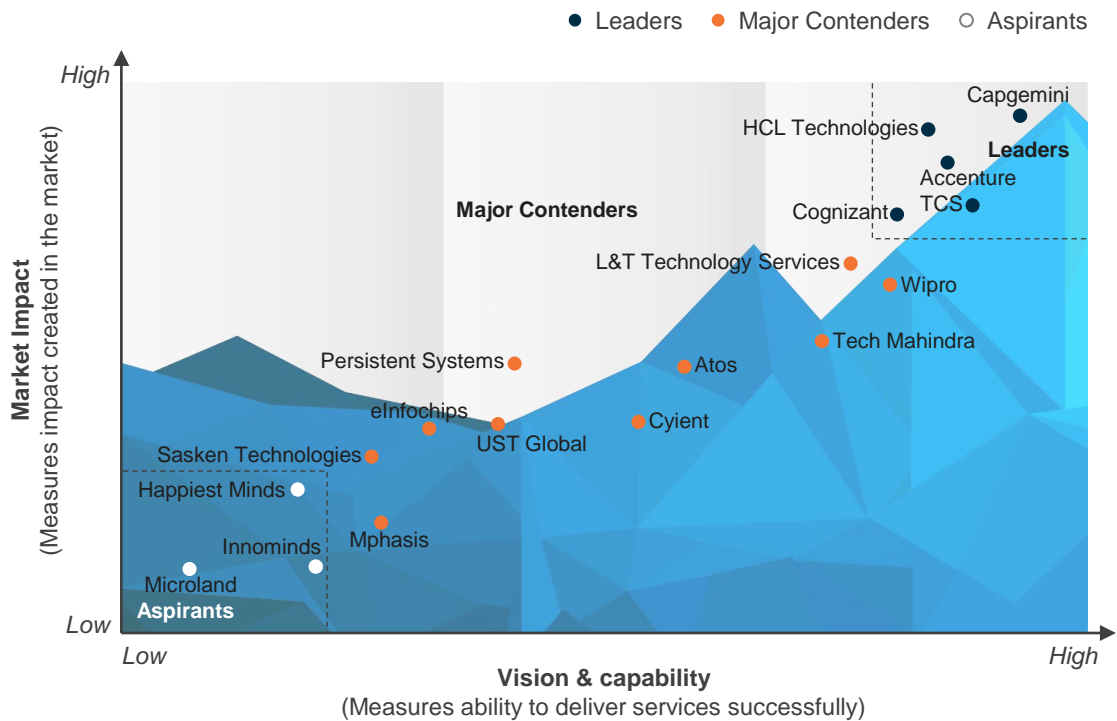
- Industry 4.0 service offerings can be categorized into four key service functions – design and consulting, development and V&V, deployment and SI, and managed services and support – that broadly encompass the Industry 4.0 services value chain
- Accenture, Capgemini, Cognizant, HCL Technologies, and TCS are the current Leaders in the overall Industry 4.0 services market. However, several service providers are emerging as major contenders across individual service functions and overall Industry 4.0 services
- L&T Technology Services and Wipro have emerged as Leaders in multiple individual service functions and they are posing as strong challengers for current Leaders in the overall Industry 4.0 services

Service provider characteristics

- Leaders in overall Industry 4.0 services have developed a strong suite of comprehensive capabilities spanning all four Industry 4.0 service functions. They are recognized for their ability to offer large-scale engagements leveraging their robust delivery capabilities across the globe
- Leaders in individual service functions have made considerable investments in developing capabilities in these functions, including investments in developing dedicated solutions and infrastructure establishments. They have also developed a robust ecosystem of partnerships to augment their capabilities and are focusing on multiple talent enhancement initiatives to strengthen their presence
- Major contenders have exhibited high growth in this space and have built meaningful capabilities to deliver Industry 4.0 services. They have developed leading offerings and competencies across select service functions, and they are focusing on bridging capability gaps across service functions that have hitherto not been a major focus, thus positioning themselves as strong challengers for Leaders
- Aspirants are at a relatively nascent/initial stage in terms of their Industry 4.0 service offerings. These players are primarily focused on one or two service functions and are expanding and building broader capabilities to enhance their presence in more service functions

This study comprises seven distinct chapters that offer a deep dive into 18 leading service providers' Industry 4.0 service portfolios and capabilities; the seven charts below illustrate the report's depth (page 1 of 3)

Everest Group Industry 4.0 Services PEAK Matrix® Assessment 2020^{1,2}



1 PEAK Matrix specific to Industry 4.0 services
 2 Assessment of Capgemini is inclusive of Altran (part of Capgemini) and reflects their joint capabilities and market impact

Source: Everest Group (2020)

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	○	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	●	●	●	○	○	○	●
Service provider 4	○	○	●	●	●	○	●	○	○
Service provider 5	○	●	○	○	○	○	○	○	○
Service provider 6	○	○	●	○	○	○	○	○	○
Service provider 7	○	○	●	○	○	○	●	○	○
Service provider 8	○	○	●	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○

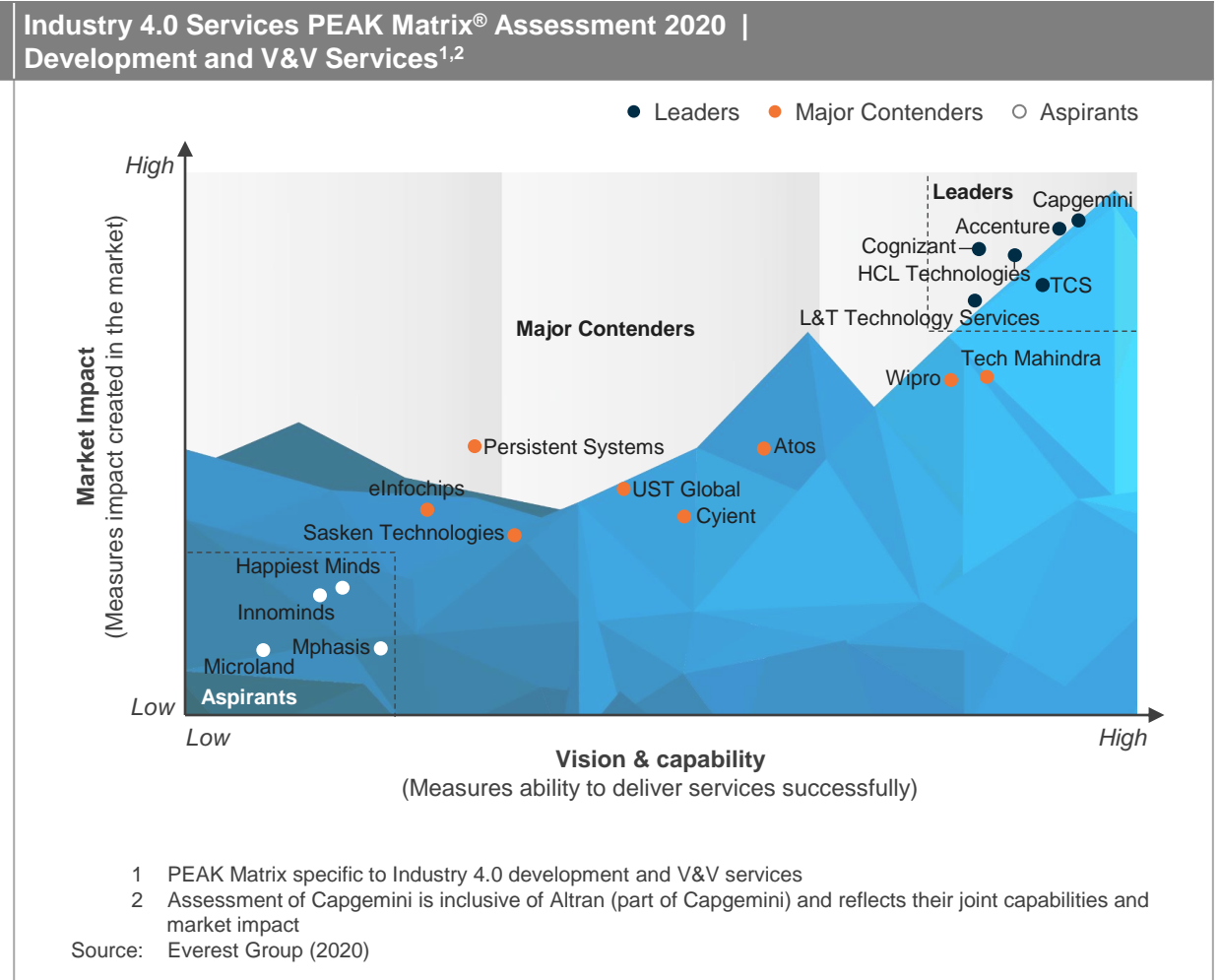
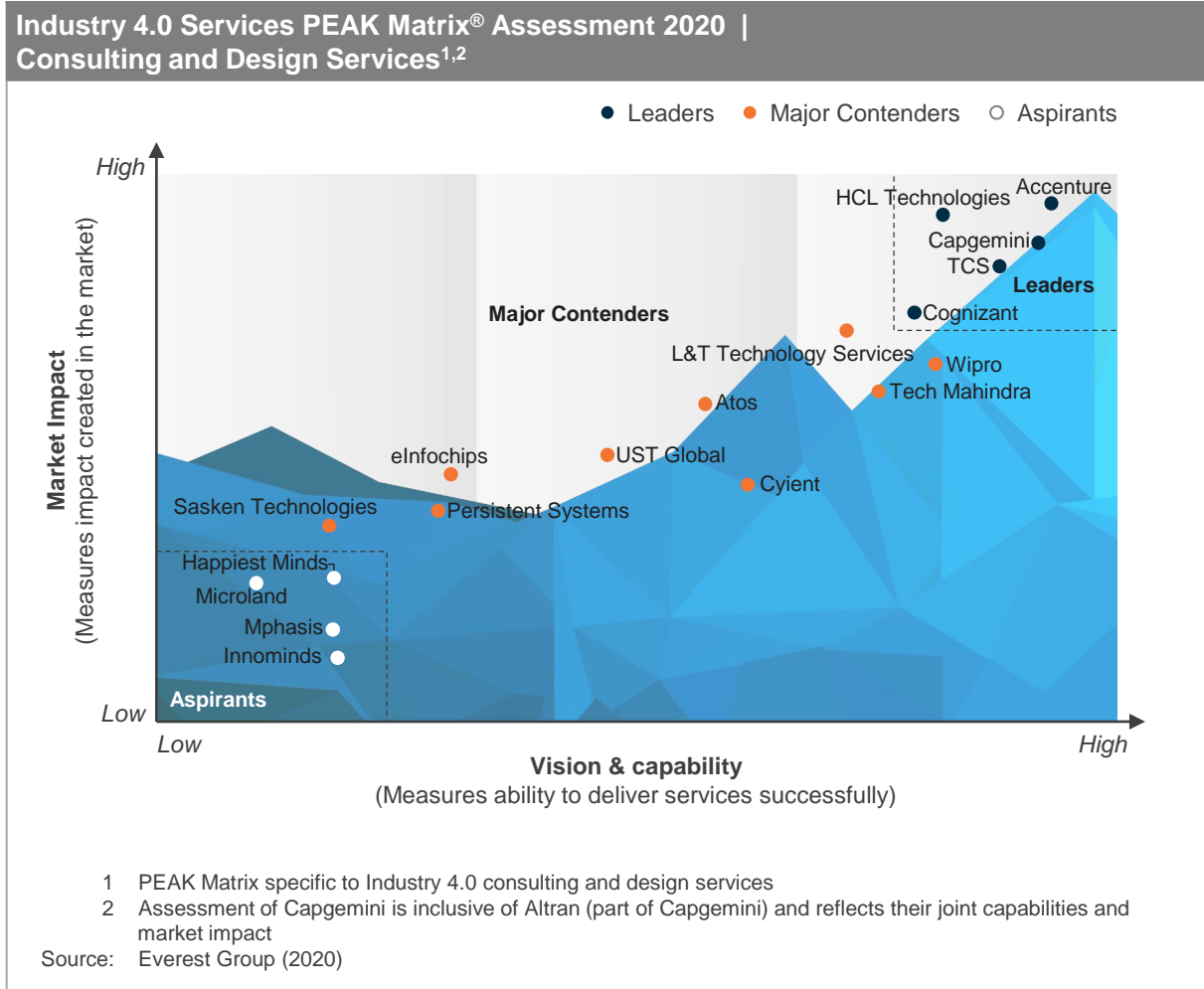
Strengths

- Possesses strong domain understanding and provides vital business recommendations to support and enhance client's decision-making
- Market-recognized project management and organizational change management capabilities
- Well-rounded portfolio of offerings across service functions and a significant presence in offering managed services and support for Industry 4.0

Areas of improvement

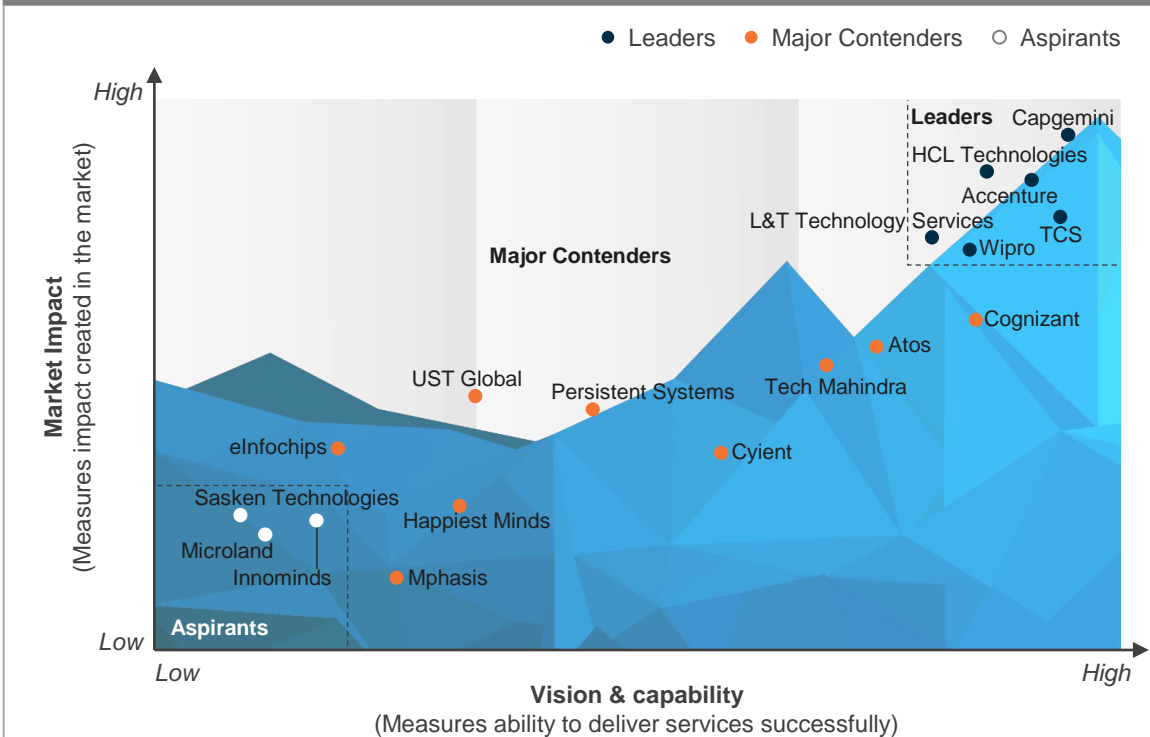
- Needs to further enhance the resource quality in engagements and improve coordination and interpersonal interactions within the team
- Can consider enhancing the presence in nearshore locations to further improve client proximity and better balance the delivery mix as compared to other Leaders

This study comprises seven distinct chapters that offer a deep dive into 18 leading service providers' Industry 4.0 service portfolios and capabilities; the seven charts below illustrate the report's depth (page 2 of 3)

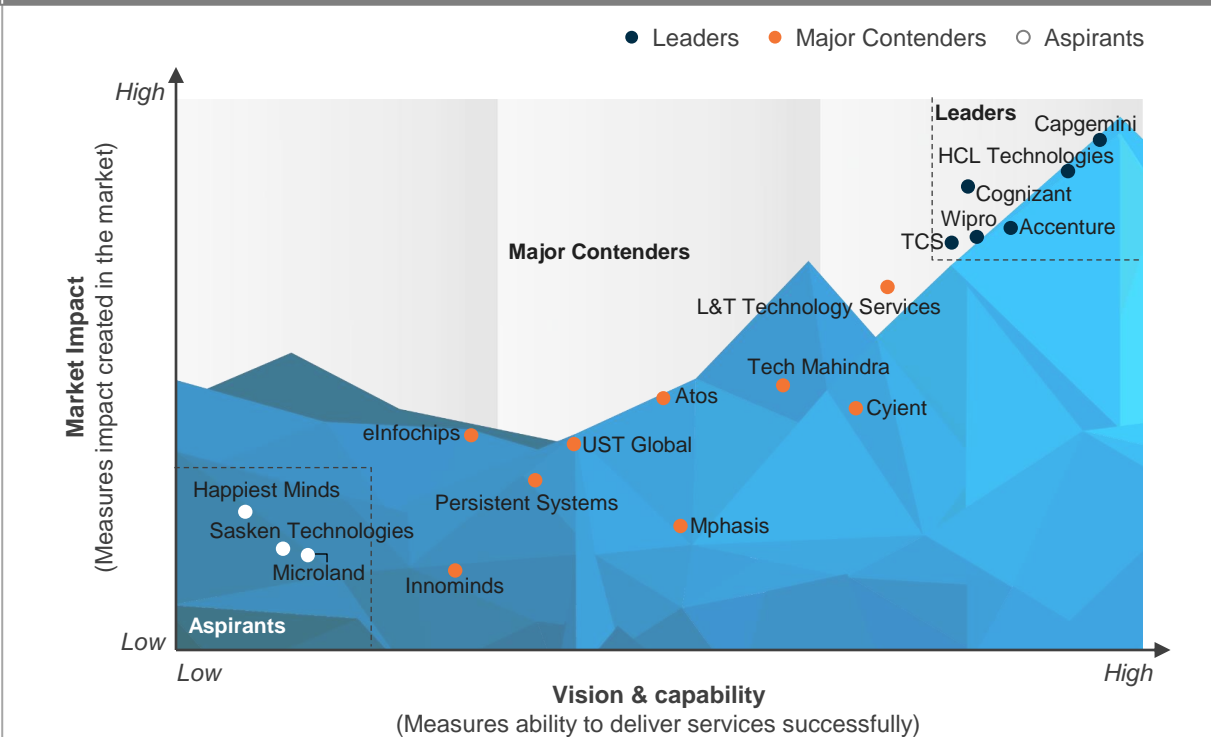


This study comprises seven distinct chapters that offer a deep dive into 18 leading service providers' Industry 4.0 service portfolios and capabilities; the seven charts below illustrate the report's depth (page 3 of 3)

Industry 4.0 Services PEAK Matrix® Assessment 2020 | Deployment and SI Services^{1,2}



Industry 4.0 Services PEAK Matrix® Assessment 2020 | Managed Services and Support Services^{1,2}



1 PEAK Matrix specific to Industry 4.0 deployment and SI services
 2 Assessment of Capgemini is inclusive of Altran (part of Capgemini) and reflects their joint capabilities and market impact

Source: Everest Group (2020)

1 PEAK Matrix specific to Industry 4.0 managed services and support services
 2 Assessment of Capgemini is inclusive of Altran (part of Capgemini) and reflects their joint capabilities and market impact

Source: Everest Group (2020)

Research calendar

Engineering Services

■ Published
 ■ Planned
 ■ Current release

Flagship Engineering Services reports

	Release date
Verification & Validation Engineering Services PEAK Matrix® Assessment	January 2020
Industry 4.0 Services PEAK Matrix® Assessment: the Transformational Leap in Cyber-physical Convergence	September 2020
Semiconductor Engineering Services PEAK Matrix® Assessment	Q4 2020
Software Product Engineering Services PEAK Matrix® Assessment	Q4 2020
Digital Engineering Services PEAK Matrix® Assessment	Q4 2020
Medical Device Engineering Services PEAK Matrix® Assessment 2021	Q1 2021
Automotive Engineering Services PEAK Matrix® Assessment 2021 – Focus on ACES	Q1 2021

Thematic Engineering Services reports

	Release date
Global Services Market Pressing Issues in 2020: Enterprises Engineering Perspective	February 2020
Digital Engineering: An Opportunity Unparalleled	February 2020
Engineering R&D (ER&D) in 2020: Who Will Move My Cheese?	February 2020
A Framework-driven Approach for Verification and Validation (V&V) of IoT Systems	May 2020
The Future of Mobility – on the Cusp of the Electrification Revolution	May 2020
Engineering the 5G World	June 2020
Engineering Services Skills Handbook: Preparing for Next Wave of Growth in Global ER&D	July 2020
Leading the Pack: Trends for the Top 200 Engineering Research & Development (ER&D) Enterprises 2020	Q4 2020
Digital Twins and their adoption across industries	Q4 2020

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