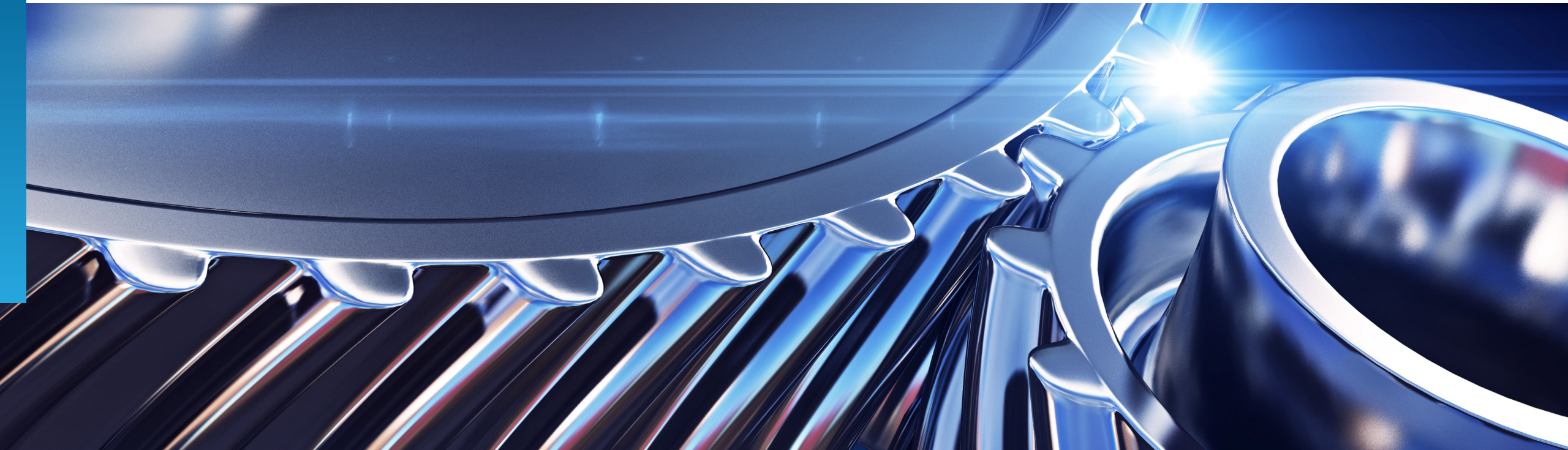


Industry 4.0 Service Provider Compendium 2023: Unleashing the Era of Phygital Manufacturing

October 2022: Complimentary Abstract / Table of Contents



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- ▶ Rewards and Recognition
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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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For more information on this and other research published by Everest Group, please contact us:

Nishant Udupa, Practice Director

Riya Agrawal, Senior Analyst

Mayank Dawar, Analyst

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Background and introduction of the research

Industry 4.0 is revolutionizing the manufacturing and operations ecosystem by converging the digital world with the physical world, integrating emerging technologies with physical systems. Enterprise outlook toward Industry 4.0 has changed post the COVID-19 pandemic, as early adopters realized significant benefits via enhanced operational efficiencies, improved asset utilization and labor productivity, and increased visibility and inventory tracking. Industry 4.0 enables cost savings, increased revenues, and the development of new platform-based business models; and as a result, enterprise investments in technologies enabling Industry 4.0 have increased across the value chain.

Engineering service providers are playing a critical role in accelerating enterprise adoption of Industry 4.0 by offering a wide range of services revolving around consulting and design, development and verification & validation (V&V), deployment & system integration (SI), and managed services and support.

This research is the second edition of Everest Group's Industry 4.0 Services PEAK Matrix® Assessment, wherein we have evaluated 22 engineering service providers featured on the PEAK Matrix®. This assessment is based on RFI responses from providers, interactions with their Industry 4.0 leadership, client reference checks, and an ongoing analysis of the engineering services market.

This report includes the profiles of the following 22 leading engineering service providers featured on the Industry 4.0 PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, HCL Technologies, LTTTS, TCS, and Wipro
- **Major Contenders:** Bosch SDS, Cyient, eInfochips, Globant, Happiest Minds, HARMAN DTS, Microland, Mindtree, SoftServe, Softtek, Tech Mahindra, and UST
- **Aspirants:** GS Lab, Incedo, and Onward Technologies

Scope of this report



Geography
Global



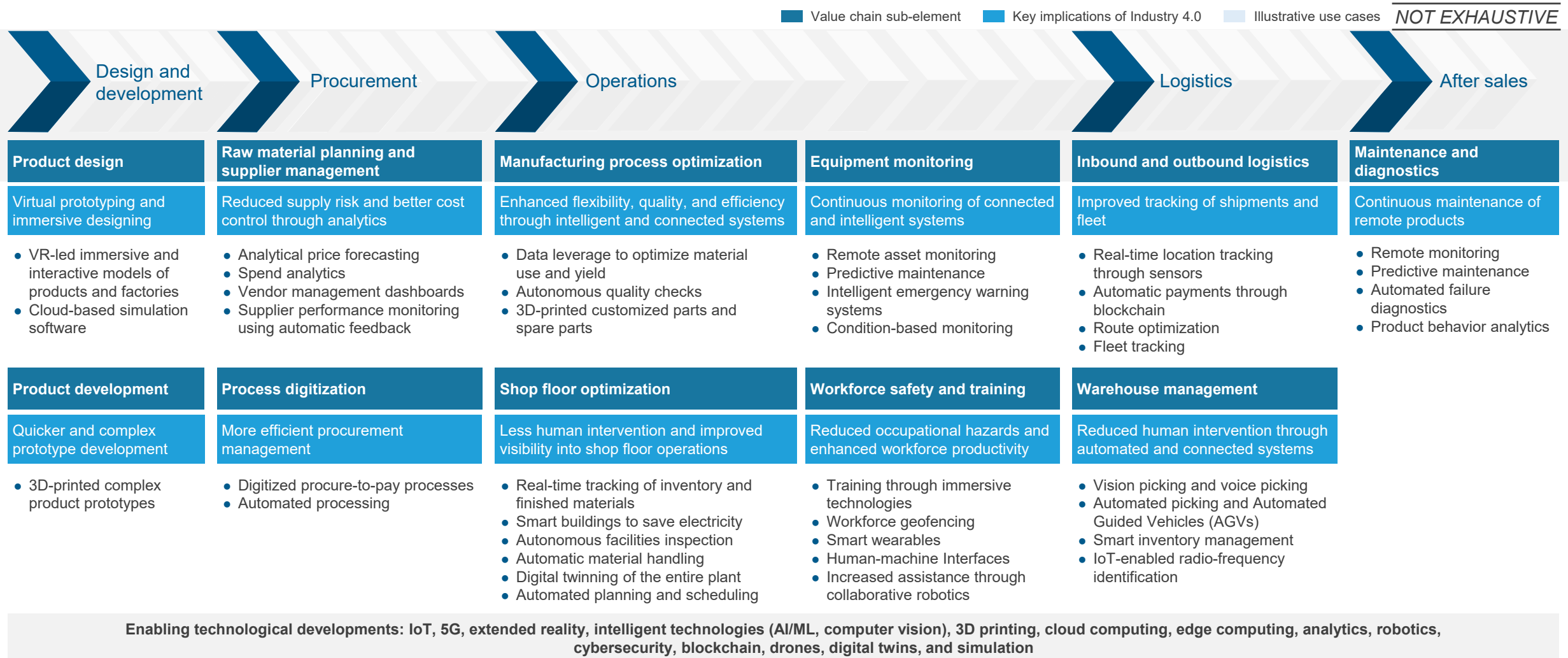
Providers
22 leading broad-based and pure-play engineering service providers



Services
Industry 4.0 Services

Key tenets of Industry 4.0 across the industrial value chain

Industry 4.0 has implications for each sub-element of the industrial value chain



The Industry 4.0 service provider compendium report has profiles and buyer case studies for 22 leading engineering service providers

Industry 4.0 Service Provider Compendium 2023: Unleashing the Era of Phygital Manufacturing

Provider | Industry 4.0 services profile (page 1 of 4) Everest Group assessment – Leader



Strengths

- Service Provider has a superior play in providing consulting and design services and support to clients
- It has made dedicated investments in forming strategic partnerships and developing IPs and solutions to bolster capabilities in IIoT, analysis, simulation, robotics, and additive manufacturing
- Clients appreciate service provider' ease of working, customer service delivery speed, as well as the ability to provide end-to-end support, to managed services and support

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Provider | Industry 4.0 services profile (page 2 of 4) Overview

Vision and strategy

Service Provider's vision is to continuously leverage technology for scaling the future for their customers. It envisions creating a sustainable world and delivering positive business boundaries.

The provider aims to achieve this by engineering the change and setting up innovative globally to effectively use technology, such as 5G, AI, collaborative robots, digital fact transport, while being committed to achieving environmental stewardship, social development progress for all its stakeholders.

Industry 4.0 Services revenue



Revenue by service function



Revenue by geography



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Adoption by industry

Industry 4.0 Service Provider Compendium 2023: Unleashing the Era of Phygital Manufacturing

Provider | Industry 4.0 services profile (page 3 of 4) Case studies and solutions

Case study 1

Developed a connected diverse device ecosystem for a aerospace enterprise

Business challenge

The client was operating in a highly complex and fragmented ecosystem and was looking to simplify the managed services. It intended to address special devices that traditional teams failed to address.

Solution

Service Provider implemented the Plant Workblaze solution using DECoDe platform management of 26,500 special devices for five years. The solution enabled asset specific industrial, hardware & software such as remote operations & configuration, firmware patch update, special devices reporting/dashboards, and family model implemented diverse device families and optimized operational efficiencies from a single pane of glass.

Case study 2

Smart factory assessment for a global HVAC manufacturer

Business challenge

The client experienced a lack of standardization in processes and tools across multiple plants for a partner to develop a business case and global roll-out plan for smart factory implementation. The provider recommended best fit for three business models to-Order, and Engineer-to-Order – with a view to standardize major platforms across plants.

Solution

Service Provider performed a fit-gap analysis of existing technology and processes for MES, supply chain collaboration, and smart factory deployment. Engaging with the client, the provider also developed an implementation plan for multi-site roll-outs and complete within eight weeks time.

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Provider | Industry 4.0 services profile (page 4 of 4) Investments and partnerships

Key alliances and partnerships (representative list)

Company	Details
Thingworx, Axeda, Vuforia, Windchill, Navigate	A partnership to provide IIoT solutions to clients for smart manufacturing, product engineering, and AR
Azure IIoT	A partnership to provide IIoT solutions to clients
AWS	A partnership to provide IIoT solutions to clients
OrCAD Capture	A partnership to provide schematic and PCB design services to clients
Allegro PCB	A partnership to provide PCB design services to clients
Mentor Graphics - xDX Designer	A partnership to provide schematic design services to customers
Mentor Graphics - xDX Library	A collaboration to provide a library for electronic designs
Expedition	A partnership to provide PCB design services to clients
Schneider Electric	A partnership to provide development and industrial automation research
Aveva	A partnership to build industrial software that will shape the future across a range of industries, from water and energy to food and infrastructure

Recent Industry 4.0 services investments/acquisitions (representative list)

Investment/target	Details
Zenith Technologies	An acquisition to provide end-to-end consultancy, design implementation, optimization, and support for applications in the pharma manufacturing stack
Brightwolf	An acquisition to provide custom IIoT solutions and technological solutions such as IIoT application engine, secure data management infrastructures, edge suites, and device managers (for quick and optimized connectivity)
TQS Integration	An acquisition to accelerate growth in IIoT, data, and analytics in Ireland
ESG Mobility	An acquisition to provide digital automotive engineering R&D for connected, autonomous, and electric vehicles

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Research calendar

Engineering services

Published Planned Current release

Reports title	Release date
Engineering Services Outsourcing Handbook	March 2022
Digital Product Engineering Service Provider Compendium 2022: Bridging the Chasm between the Physical and Digital Worlds	March 2022
The Growing Need for Inclusive Talent Models: Learning from Impact Sourcing Specialists	May 2022
Engineering Services Enterprise Pulse: Sustaining Customer Satisfaction Amid a Talent Shortage	May 2022
Impact Sourcing Specialist Profiles 2022	June 2022
Engineering Next-Generation Digital Products	June 2022
Digital Twin Services PEAK Matrix® Assessment 2022	July 2022
Connected Medical Device Services PEAK Matrix® Assessment 2022	August 2022
Mirror into the Megatrends	August 2022
Trends for the Top 200 Engineering Research & Development (ER&D) Enterprises	September 2022
Industry 4.0 Services PEAK Matrix® Assessment 2022: Unleashing the Era of Phygital Manufacturing	September 2022
Industry 4.0 Services Provider Compendium 2023: Unleashing the Era of Phygital Manufacturing	October 2022
Engineering Services Top 50	Q4 2022
Software Product Engineering Services PEAK Matrix® Assessment 2023	Q4 2022
5G PEAK Matrix® Assessment 2023	Q1 2023

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Blog

everestgrp.com/blog

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto

canada@everestgrp.com
+1-647-557-3475

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