ARC Advisory Group

ARC MarketMap for Engineering Services by GSPs in India 2025

A comprehensive research report analysing Global Service Providers' capabilities, key challenges, and unique competitive advantages

February 2026

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Executive Summary

Rapid Shift Toward AI-native Engineering and Automated Lifecycle Management

Engineering service providers are integrating AI throughout the product lifecycle, spanning model-based design, automated testing, predictive maintenance, and code generation. Those with robust data engineering capabilities, mature MLOps practices, and domain-ready AI accelerators are increasingly favored for complex digital engineering initiatives

Growing Convergence of OT/IT through Industrial Connectivity and Edge Intelligence

Demand is rising for engineering firms that can unify operational technologies with IT systems, offering capabilities in industrial protocols, secure connectivity, edge device engineering, and real-time data orchestration. This trend favors vendors with strong embedded, Industrial IoT, and protocol stack expertise.

> ***Artificial Intelligence, digital twins, and platform engineering are no longer enablers—they are the new engine powering next-generation engineering excellence.***

Executive Summary

Expansion of Platform-based Engineering Using Digital Twins, Simulation, and Model-Based Systems Engineering (MBSE)

Customers increasingly expect engineering partners to deliver reusable platforms, simulators, and virtual validation environments. Providers with strong simulation frameworks, physics-based modeling, and twin-ready architectures are gaining traction in automotive, manufacturing, healthcare, and industrial OEM ecosystems.

Consolidation through Targeted M&A for Capability Depth and Domain Expansion

Engineering service providers are acquiring niche players in AI governance, cybersecurity, cloud engineering, product design, and industry-specific IP to strengthen differentiated capabilities and accelerate access to premium accounts. This M&A-driven strategy is becoming central to scaling digital engineering portfolios and expanding market presence.

Increasing Client Preference for Domain-Specialized Engineering Partners

Customers are moving away from generic outsourcing toward partners with deep industry context, strong certifications, and proven solution accelerators. Providers with sector-specific playbooks across automotive, industrial, BFSI, medtech, and energy are better positioned to secure multi-year transformation and platform development mandates.

Introduction

This MarketMap report aims to understand key industry challenges and assess service providers' solution capabilities and strategic vision.

INDUSTRY – All Industries

GEOGRAPHY – Global

SUPPLIERS EVALUATED – 15

SERVICES/TECHNOLOGY – Engineering Services

Given the increasing complexity, customization demands, and rapid technological shifts across the engineering services landscape, this report serves as a strategic guide for organizations evaluating, deploying, and scaling advanced engineering service solutions. It presents a comprehensive assessment of 15 leading engineering service providers and their core offerings.

The evaluation leverages ARC's MarketMap framework, incorporating live capability demonstrations, rigorous secondary research, and detailed vendor responses to a 100-parameter questionnaire covering technical competencies, delivery excellence, digital maturity, innovation roadmaps, corporate alignment, and client satisfaction benchmarks. ARC's findings indicate that while engineering services is a well-established domain, competition remains intense, with providers differentiating through full-stack service delivery, deep integration of AI and GenAI, and strong enablement capabilities across design engineering, asset performance, lifecycle optimization, and operational risk management.

Introduction

Who Should Read this Report

This report is valuable for stakeholders across manufacturing, utilities, transportation, energy, life sciences, and public infrastructure who are assessing engineering service partners to accelerate modernization and operational excellence. It provides a clear view of leading providers' strengths, delivery maturity, and digital engineering capabilities, while offering practical guidance on selecting solutions that align technology investments with long-term business, efficiency, and sustainability objectives.

Technology Buyers

CIOs, IT directors, and digital transformation leaders can use this report to assess the maturity of engineering service providers, understand delivery and engagement models (on-site, remote, hybrid), and evaluate how effectively providers integrate with PLM, ERP, MES, and Industrial IoT ecosystems.

Operations and Maintenance Leaders

Plant managers, field service heads, and maintenance supervisors will benefit from insights on engineering partners that strengthen reliability programs, optimize maintenance workflows, improve uptime, and enable more efficient field and mobile execution.

Procurement and Finance Leaders

Procurement teams and CFOs can leverage this report to compare pricing structures, commercial models, and total cost of ownership, as well as the modularity, scalability, and expected ROI timelines of engineering service engagements

Strategy and Innovation Leaders

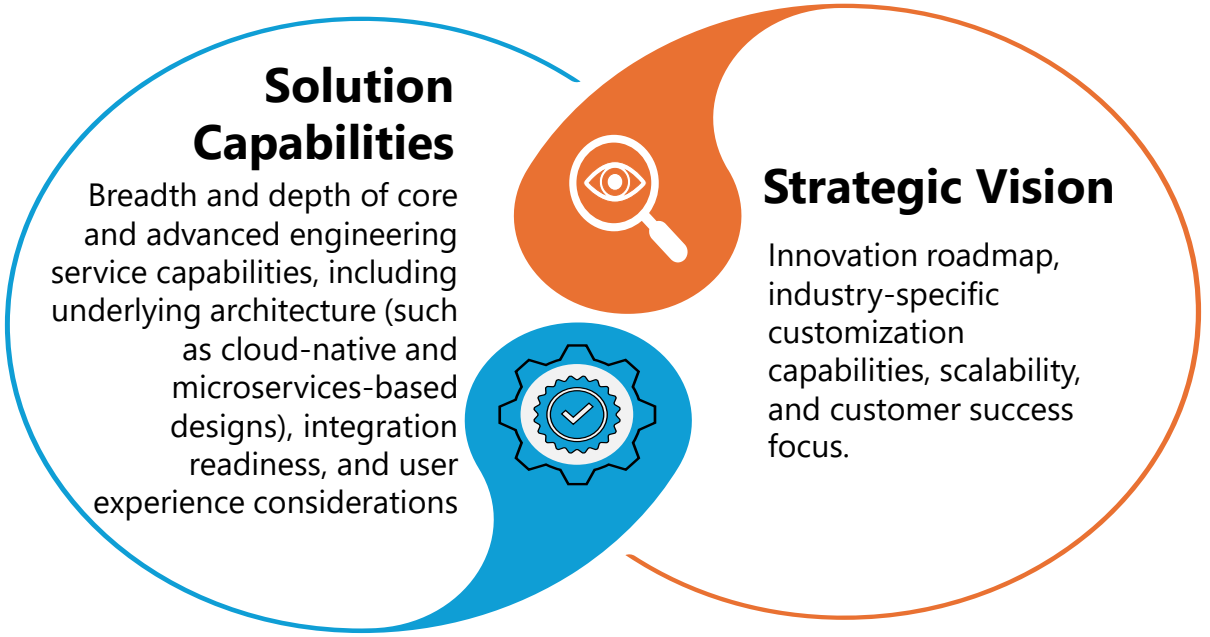
Digital innovation and sustainability heads should use this report to benchmark vendors based on ESG enablement, data-driven insights, and support for circular economy and Scope 1–3 emission tracking.

Scope of the Report

The engineering services market is exclusively delivered by independent global service providers (GSPs) headquartered in India.

Engineering services help address constraints in the availability of technical talent in developed and developing countries. These resources are needed to reduce operating costs, improve quality, create new products, and build infrastructure, while delivering greater value and shorter time-to-market. Engineering services provide a broad range of technical services, including mechanical, electrical, mechatronics, software, information technology (IT), business process management, and more. These services support product concepts; product and industrial design; automation of plants; mechanical, electrical, and embedded system designs; maintenance of products and plants; asset management; product lifecycle-related services; detailed engineering; testing; and prototyping. Across many organizations, engineering services are core activities for engineering companies, startups, and IT providers.

Suppliers will be assessed across two axes.



Scope of the Report

This MarketMap analyzes suppliers across two major parameters; **Solution Capabilities** and **Strategic Vision.**

ARC MarketMap

Technical Capabilities

Emphasizes foundational technology dimensions, including modular design, scalability, deployment models, data handling, security and compliance, system integration and interoperability, AI-enabled capabilities, and configuration and customization mechanisms.

Functional Capabilities

Addresses essential engineering service functions organized into four categories:

- Product engineering
- Process engineering
- Automation-related Services
- Asset management-related services

Execution & Support Services

Outlines the supplier's service portfolio and global channel strategy.

Product Vision & Strategy

Examines the supplier's long-term vision, innovation roadmap, and overall strategic direction.

Corporate Strategy

Encompasses financial planning, mergers and acquisitions, organizational structure, go-to-market strategy, and sustainability initiatives.

Customer Base

Emphasizes supplier revenue, customer retention, representative use cases, and key performance indicators (KPIs).

Supplier Scoring

SUPPLIERS	SOLUTION CAPABILITIES			STRATEGIC VISION		
	Technical Capabilities	Functional Capabilities	Execution and Support Services	Product Vision & Strategy	Corporate Strategy	Customer Base
Tech Mahindra	4.7	4.6	4.4	4.6	4.6	4.3

1 – Very Poor; 2 – Poor; 3 – Average; 4 – Good; 5 – Very Good

Note: The evaluations for AXISCADES, HCL Technologies, Infosys, ITC Infotech, KPIT Technologies, Persistent Systems, Tata Consultancy Services, and Wipro are conducted independently of supplier input. These assessments rely exclusively on ARC Advisory Group's proprietary database and publicly available disclosures from the respective suppliers

Source: ARC Advisory Group

Engineering Services

ARC Engineering Services Framework

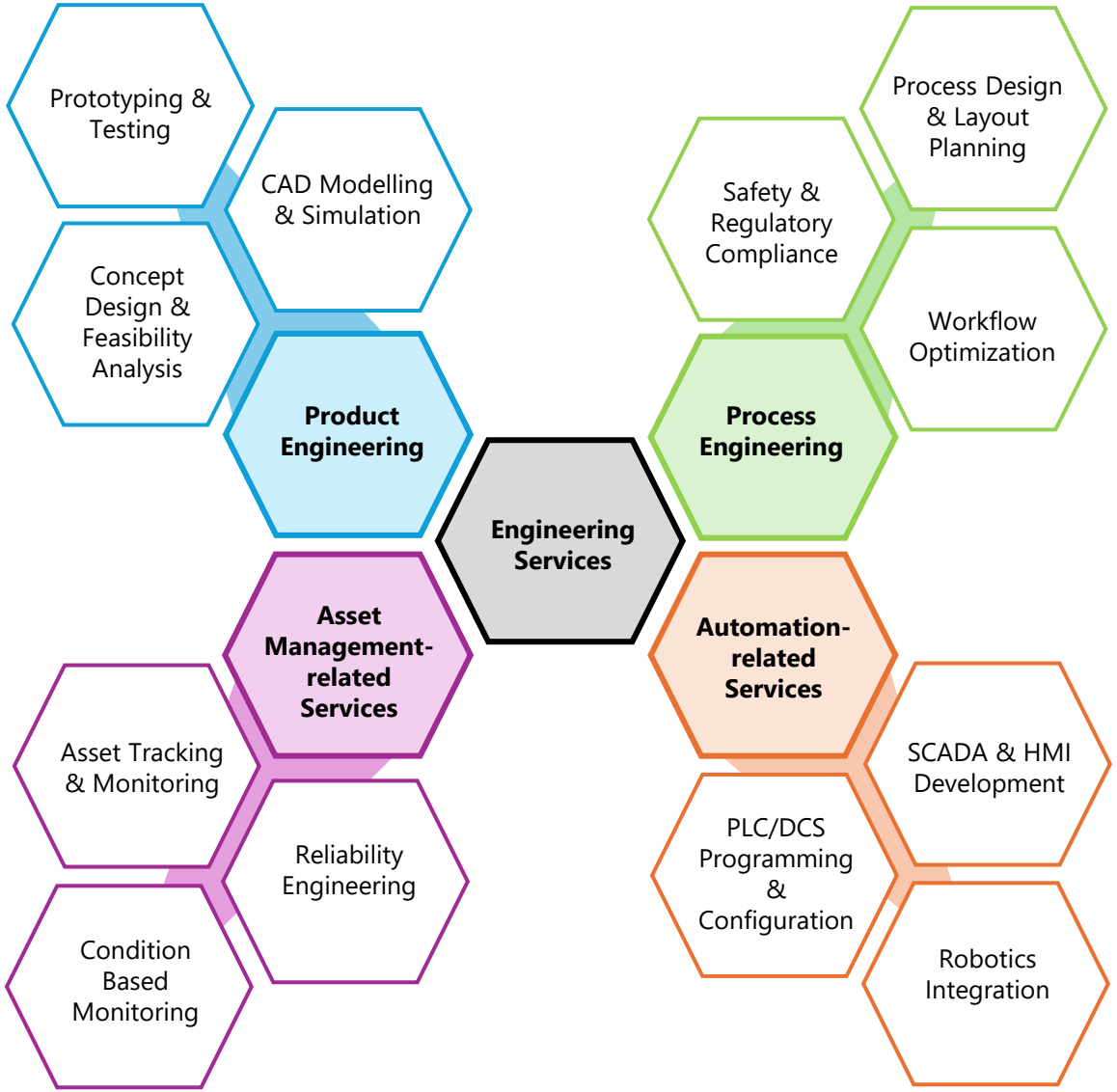
ARC Advisory Group defines engineering services as a comprehensive set of professional and technical activities delivered by Global Service Providers to support industrial and infrastructure projects across the full project lifecycle. These services typically encompass the following areas:

- **Product Engineering Services**
  Activities supporting product design, prototyping, testing, and validation.

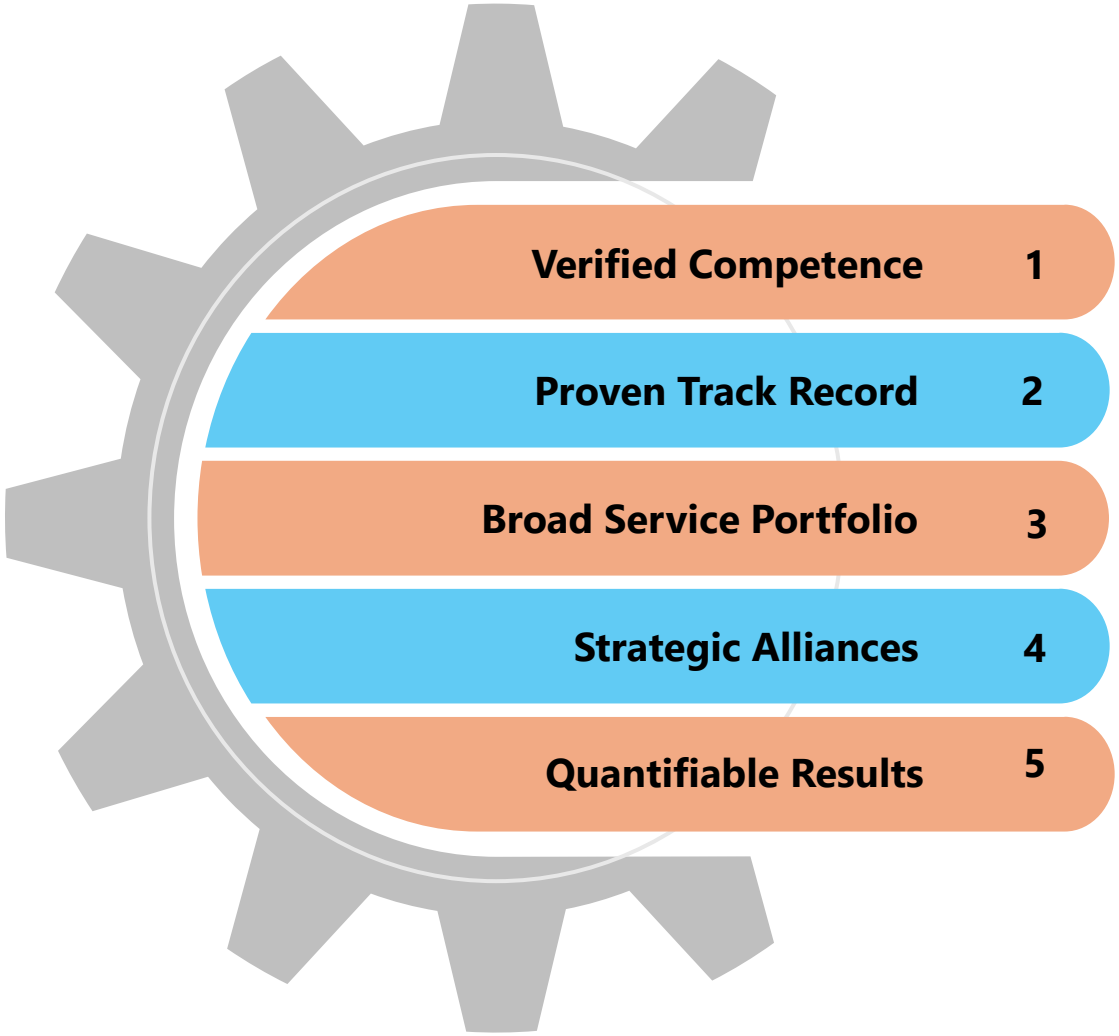
- **Process Engineering Services**
  Design and optimization of manufacturing processes to improve efficiency, quality, and regulatory compliance.

- **Automation-related Services**
  Development, configuration, and commissioning of automation systems, including DCS, PLC, HMI, and related control platforms.

- **Asset Management-related Services**
  Implementation and ongoing support for CMMS and EAM systems, lifecycle management, and predictive maintenance initiatives.



Eligibility Criteria for Supplier Assessment



Demonstrated expertise in delivering engineering services solutions across diverse industries and geographic regions.

Demonstrated success evidenced by measurable improvements in asset performance or lifecycle optimization.

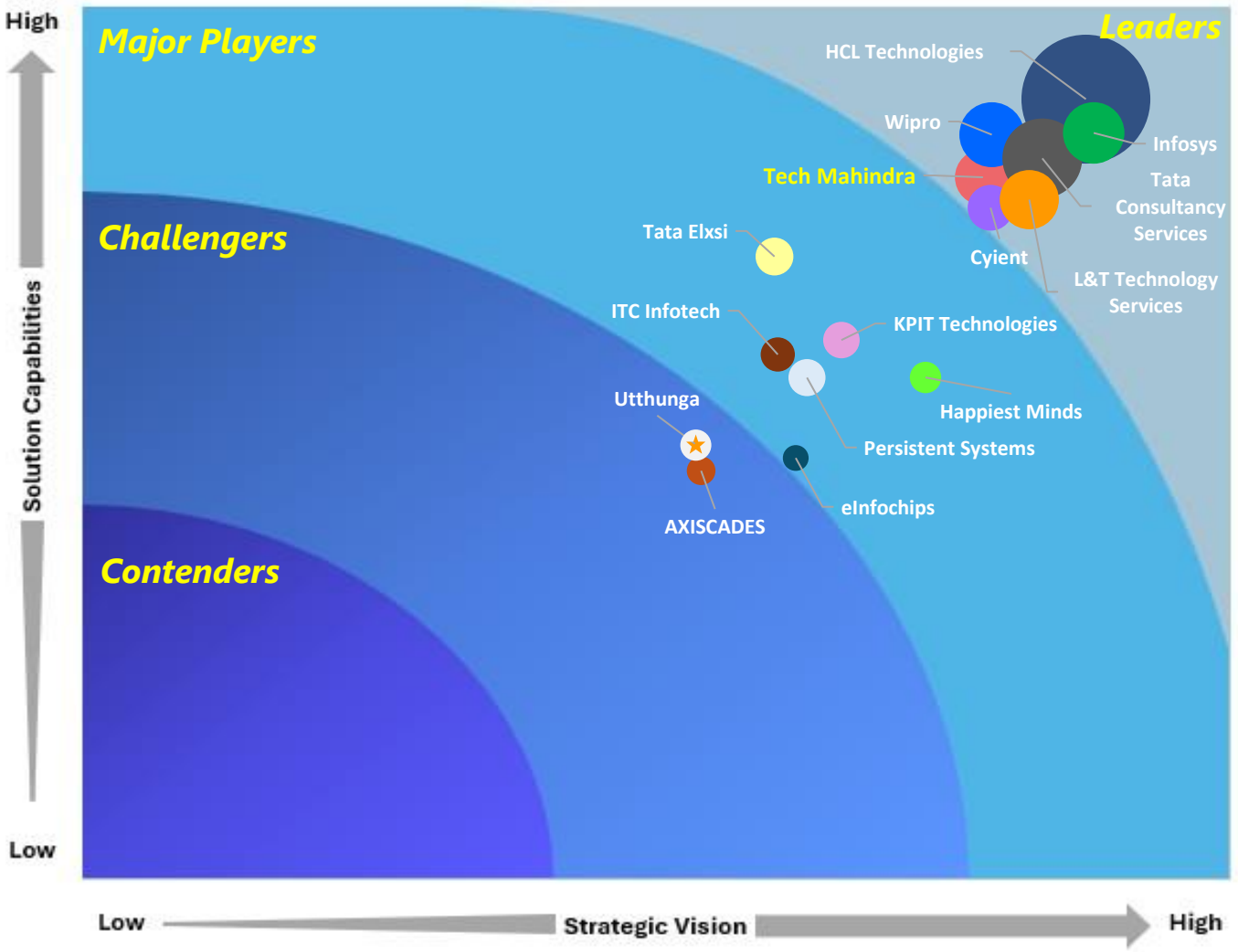
Broad service offerings spanning at least one of the following areas: product, process, automation, or asset management services.

Established partnerships with technology providers, industry bodies, or regulatory organizations to enhance capabilities.

Measurable outcomes demonstrating successful engineering service implementations across multiple sectors.

Supplier Positioning

ARC MarketMap for Engineering Services by GSPs in India 2025 | **Tech Mahindra** is positioned as Leader



"The MarketMap evaluates suppliers delivering engineering services across industrial sectors. These services support organizations in product design, process optimization, operational automation, and asset management, enabling scalable innovation, improved operational sustainability, and measurable business outcomes."

Note: The evaluations for AXISCADES, HCL Technologies, Infosys, ITC Infotech, KPIT Technologies, Persistent Systems, Tata Consultancy Services, and Wipro are conducted independently of supplier input. These assessments rely exclusively on ARC Advisory Group's proprietary database and publicly available disclosures from the respective suppliers
Source: ARC Advisory Group

Supplier Positioning

Supplier Classification

Leaders

Leaders exhibit strong current performance and a clearly articulated future strategy. They demonstrate well-established solution capabilities, consistent delivery execution, high levels of customer satisfaction, and mature technology foundations. Leaders typically maintain broad service portfolios, defined innovation roadmaps, alignment with industry requirements, and the ability to execute engagements consistently across global operations.

Major Players

Major Players demonstrate consistent performance across most evaluation criteria and maintain an established market presence. They offer broad service capabilities and reliable delivery execution, though they may trail Leaders in areas such as innovation depth, portfolio breadth, or strategic clarity. These providers show solid customer adoption and competitive capabilities but may be less differentiated or slower in scaling advanced technologies.

Challengers

Challengers demonstrate strengths in selected areas but show uneven performance across capabilities, market presence, or long-term strategic direction. They may exhibit depth in specific functionalities, industries, or regional markets, yet lack the breadth needed to compete with top-tier providers. Challengers are typically in the process of enhancing their offerings, maturing delivery models, or pursuing strategic expansion initiatives.

Contenders

Contenders demonstrate notable potential and may show strength in areas such as innovation, technology depth, or specialized engineering capabilities. However, they typically face constraints related to scale, market presence, or delivery consistency. These providers often differentiate through proprietary IP, agile delivery approaches, or alternative commercial models.

Rising Star

Rising Stars represent emerging vendors demonstrating rapid growth, notable innovation, and increasing market traction. They often introduce modern architectures, differentiated approaches, or industry-specific accelerators, but typically lack the scale, customer references, or operational maturity of more established providers.

ARC's Observation

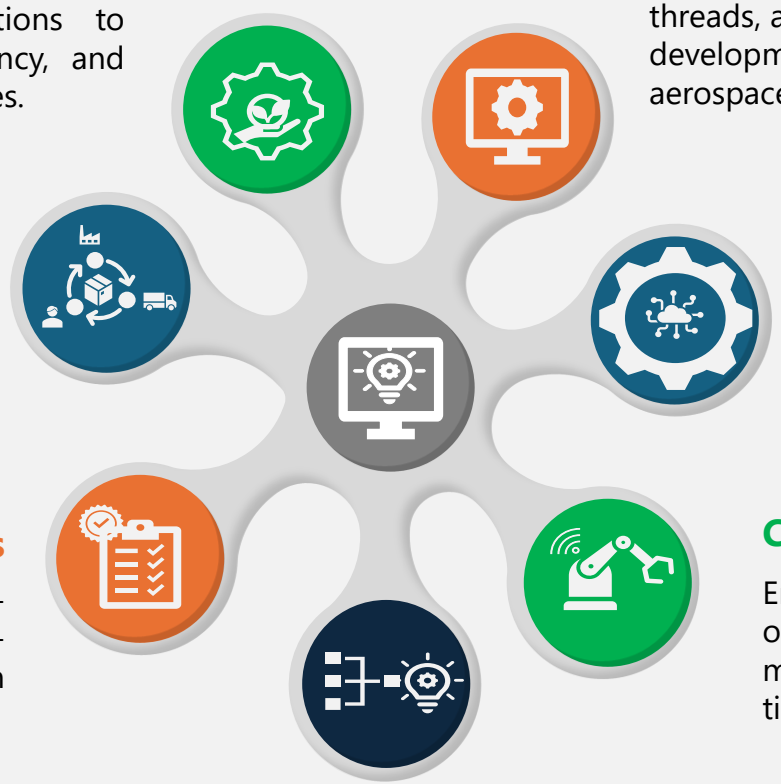
Key Trends in Engineering Services

Sustainability & Regulatory Pressures

ESG mandates, energy transition objectives, and safety regulations are driving organizations to redesign products, improve energy efficiency, and invest in carbon-neutral engineering processes.

Shift Toward Software-Defined Engineering

Rising adoption of software-defined vehicles (SDV), digital threads, and model-based engineering is reshaping product development cycles across the automotive, industrial, and aerospace sectors.



Supply Chain Realignment & Localization

Geopolitical shifts are driving increased investment in resilient, localized manufacturing and R&D hubs, creating new engineering opportunities across semiconductors, mobility, and industrial automation.

AI-Native Engineering Workflows

Engineering organizations are integrating GenAI, simulation intelligence, and autonomous code generation into design, validation, and testing workflows to improve productivity and shorten engineering cycle times.

Shift Toward Outcome-Based Models

Engineering spend is shifting from traditional FTE-based engagements toward co-innovation, risk-sharing, and revenue-linked models, particularly in sustainability and product-as-a-service initiatives.

Convergence of OT-IT-Indsutrial IoT Ecosystems

Enterprises are increasing investments in connected operations, digital twins, and edge AI to support predictive maintenance, improve energy efficiency, and enable real-time operational optimization.

Platform-Led Vendor Consolidation

Clients are increasingly favoring partners with platform-centric, IP-based, and cloud-aligned engineering capabilities, contributing to market consolidation, larger multi-year engagements, and ecosystem-driven differentiation.

Tech Mahindra

Headquarters: **Pune, India**

Founded: **1986**

Employees: **149,000+**

Engineering Services Revenue: >**USD 1 BN**

Website

Tech Mahindra offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 149,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consulting, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, AI & analytics, and cloud & infrastructure services.

Solution Overview

Tech Mahindra brings over three decades of experience in engineering services, across 10+ industries. The company combines design-to-build pedigree with chip to cloud capabilities, delivering innovative and human centric products and platforms to its customers. Along this journey, Tech Mahindra has enabled 1000+ successful new product launches and has contributed to 500+ patents. It has delivered billions of USD cost savings through strategic sourcing, supply chain optimization, design optimization and lean manufacturing practices. It has helped customers build and commission 100+ plants and factories across asset heavy industries, leveraging IIOT technologies. It has enabled transformation with digital twin and digital thread capabilities, improving productivity and efficiency gains up to 30%.

Differentiators

- TechM offers broad engineering coverage spanning product and process engineering, automation, simulation, embedded systems, and safety-critical engineering.
- TechM has onshore and nearshore footprint in US,. Eastern Europe, and Mexico, along with JV with Sumitomo Corporation in Japan. These are backed by investments in 30+ labs and partnerships with Universities.
- It demonstrates advanced use of AI models and agents in product and product lifecycle workflows
- Its engineering portfolio is supported by a strong OT and IT convergence foundation, including Industrial IoT platforms, private 5G and MEC deployments, and security controls aligned with IEC and NIST standards.

Key Industries

- **Automotive**
- **Aerospace & Defence**
- **Telecommunications**
- **Machinery**
- **Medical Products**
- **Semiconductor**

Note: This list is not exhaustive; only the primary industries are highlighted.

Mergers & Acquisitions

- **Pininfarina**, an iconic name in the world of design, brings in a combination of human centricity and style to phygital products
- **Com Tec Co (CTCo)** a Latvia-headquartered platform engineering company, to expand capabilities in digital platforms and AI-driven applications
- **Cerium Systems** a global company in VLSI and embedded software sectors

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Potential for Enhancements

- Tech Mahindra can deepen domain expertise in higher-value engineering areas like industrial automation, energy & utilities, CPG segments.
- Increase investment in AI-native engineering platforms, and productized offerings to improve time to market for customers
- Expand nearshore engineering centers to support complex R&D programs and improve client proximity and collaboration.
- Strengthen capabilities in OT cybersecurity, functional safety, and regulatory engineering to support long-cycle, high-trust engineering engagements.

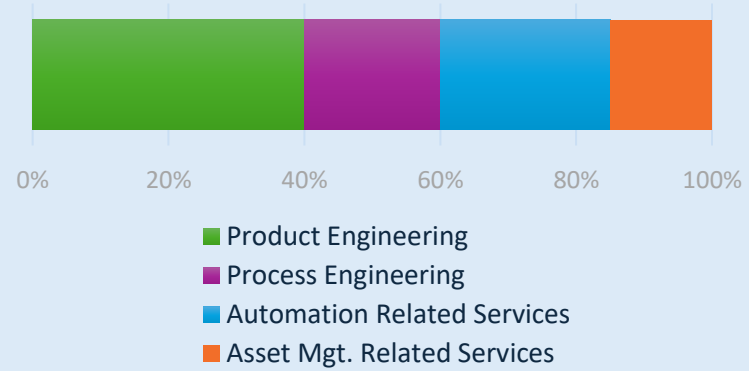
When to Consider Tech Mahindra

- Tech Mahindra is well suited for long term & strategic programs requiring scale, complexity and domain depth, across full product lifecycle, from design to aftermarket
- Appropriate for OT and IT modernization initiatives involving digital twin, thread and MBSE.
- A strong fit for AI and GenAI–enabled industrial use cases such as predictive maintenance, diagnostics, and digital platform engineering.

Geographies

Note: Darker shades indicate a higher presence in the region

Engineering Services Capabilities



Note: Percentages reflect revenue share (100% = total revenue)

Key Partnerships

AVEVA: Focused on asset-centric digital transformation, combining Asset Information Management, unified operations, digital twin capabilities, and joint go-to-market initiatives.
Siemens: Broad lifecycle capabilities, including Athena Solutions for scalable, AI-enabled MES, with emphasis on legacy modernization and shop-floor efficiency.
AWS: Strategic 360° partnership as a Consulting and Managed Service Provider, leveraging global SI status, reusable cloud-native frameworks, and joint GTM to accelerate cloud transformation.
Mimik Technologies: Partnership focused on agentic AI at the edge, supported by a production-first Physical AI lab to enable development, certification, and deployment of agentic-native workflows.

Portfolio Analysis of Tech Mahindra

Current State

- Tech Mahindra offers a broad engineering services portfolio spanning telecommunications, connected products, Industry 4.0, IoT, AI-enabled operations, and software-defined product development.
- The company maintains a strong global delivery footprint across APAC, EMEA, North America, and Latin America, supported by platforms such as Swifter.io, TechMVerse, and Orion.
- Its rich heritage in discrete manufacturing and communications provide delivery scale and operational maturity, while capabilities in process manufacturing continue to expand

Business Goals

- Tech Mahindra is strengthening its presence in high-growth areas like digital manufacturing while further advancing AI-enabled operations.
- Expand platform-led offerings and non-linear revenue models that deliver to promise of AI at the core and experience at the edge
- Expanding presence and coverage with Global Capability Centres in India and Eastern Europe.

Opportunities

- Tech Mahindra would benefit from stronger specialization in safety-critical and domain-intensive sectors such as oil & gas, lifesciences, and industrial automation.
- Platform maturity related to productization, systems integration, and monetization requires further development to support scalable engineering offerings.
- Reinforcing capabilities in OT cybersecurity, regulatory compliance, and functional safety would improve competitiveness in long-cycle, high-trust engineering programs.

Recommendations

- Tech Mahindra can deepen domain expertise through targeted talent acquisition, expanded ecosystem partnerships, and development of specialized engineering centers.
- Strengthen platform strategies by articulating clear commercial models and demonstrating enterprise-scale use cases to improve differentiation.
- Enhance capabilities in OT security, compliance-driven engineering, and model-based development to increase the share of digital revenue in overall engineering.

Key Takeaways

Tech Mahindra exhibits broad capabilities in digital and connected engineering; however, competitiveness in deeply domain-intensive industries would benefit from more focused strengthening. Advancing platform maturity, deepening domain specialization, and expanding nearshore R&D capabilities will be important to enhance its overall positioning within the engineering services market.

Buyer Recommendations

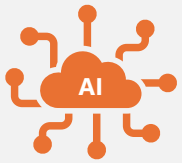
Buyer Advisory

Engineering success is being redefined by vendors that can support intelligent, connected, and scalable digital engineering across the full product lifecycle.

HIGH

PRIORITY

LOW



Prioritize vendors with strong AI-enabled engineering capabilities

Focus on partners that demonstrate mature use of AI and ML across verification, validation, predictive engineering, and automated code generation to accelerate development cycles and improve engineering accuracy.

Select providers with proven digital thread and digital twin maturity

Ensure the vendor can seamlessly integrate product lifecycle data across PLM/ALM, simulation, manufacturing, and field performance to enable continuous, closed-loop engineering.

Evaluate cloud-native and scalable architecture expertise

Select suppliers with proven skills in microservices, containerization, event-driven architectures, and hybrid cloud deployment to support high-performance engineering workloads and cross-domain data processing.

Choose vendors with strong Industrial IoT, edge, and real-time data engineering depth

Look for demonstrated experience in sensor integration, OT–IT convergence, industrial protocols, time-series data processing, and secure device management at scale for asset-intensive environments.

Assess mastery in model-based systems engineering (MBSE)

Prioritize partners that apply MBSE to complex, multi-domain systems to improve requirements traceability, reduce rework, and enable early-stage performance simulation across engineering programs.

Buyer Advisory

Engineering Services Concentration Matrix

- The categorization reflects engineering capability emphasis and engagement patterns across suppliers, based on their relative strengths in product engineering, process engineering, automation, and asset management-related services.
- It is intended to help inform buyer shortlisting and comparative evaluation, and should not be viewed as a ranking of performance or overall suitability.
- Buyers are encouraged to align supplier selection with their specific engineering requirements, ownership expectations, and desired outcomes, rather than defaulting to any single category as inherently superior.

Transformation Pioneers

Supplier's delivering broad, integrated capabilities that enable complex, enterprise-wide initiatives, supporting long-term value creation through innovation, IP, and outcome-aligned partnerships.

CYIENT, HCLTech, Infosys, L&T Technology Services, TCS TATA CONSULTANCY SERVICES, TECH mahindra, wipro

Growth Enablers

Suppliers demonstrating consistent and structured delivery models that support efficiency, predictability, and expansion across repeatable or multi-initiative engagements.

happiest minds The Mindful IT Company Born Digital . Born Agile, ITC INFOTECH, KPIT, Persistent, TATA ELXSI

Value Specialists

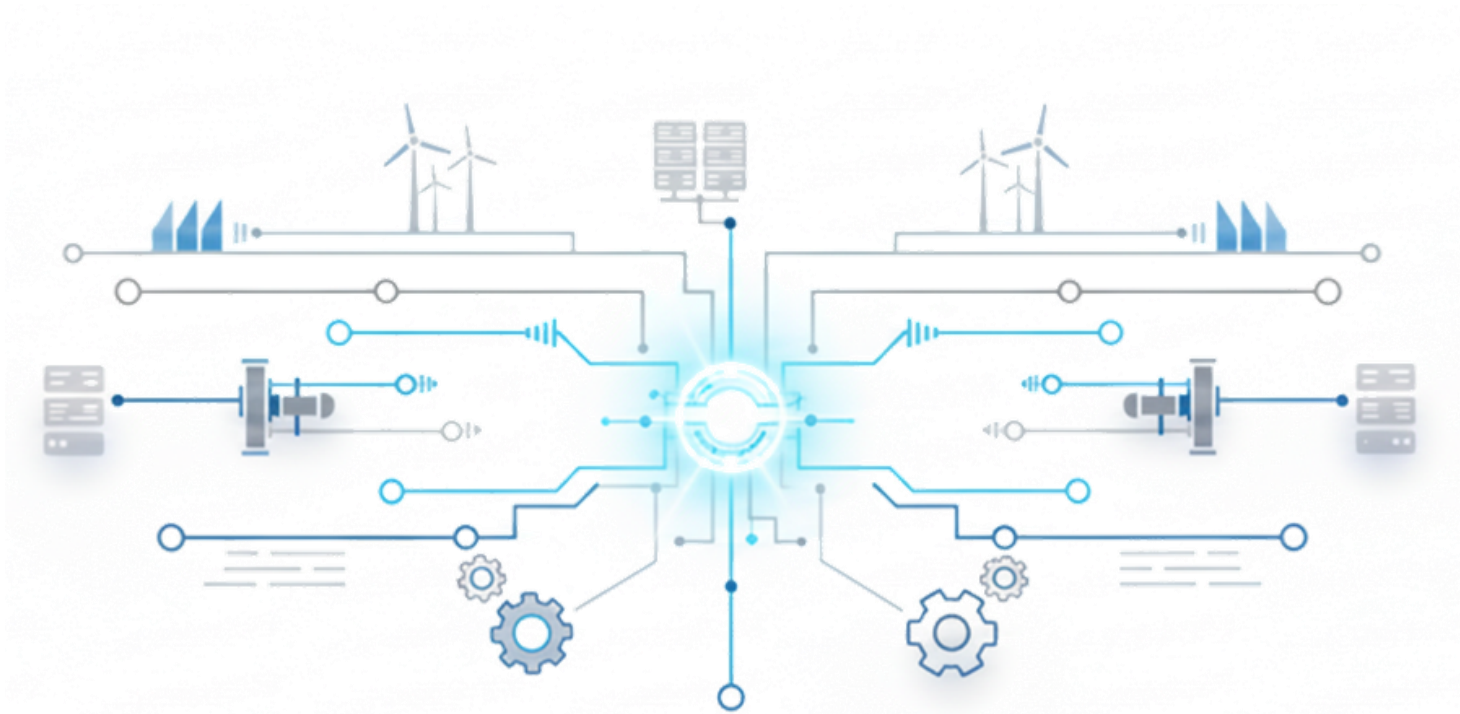
Supplier's offering specialized capabilities aligned to specific, well-defined initiatives, making them well suited for targeted programs with clear scope and near-term objectives.

AXISCADES, eInfochips An Arrow Company, utthunga Engineering Transformation

Note: The suppliers are mentioned in alphabetical order
Source: ARC Advisory Group, 2025

Engineering Services Concentration Matrix

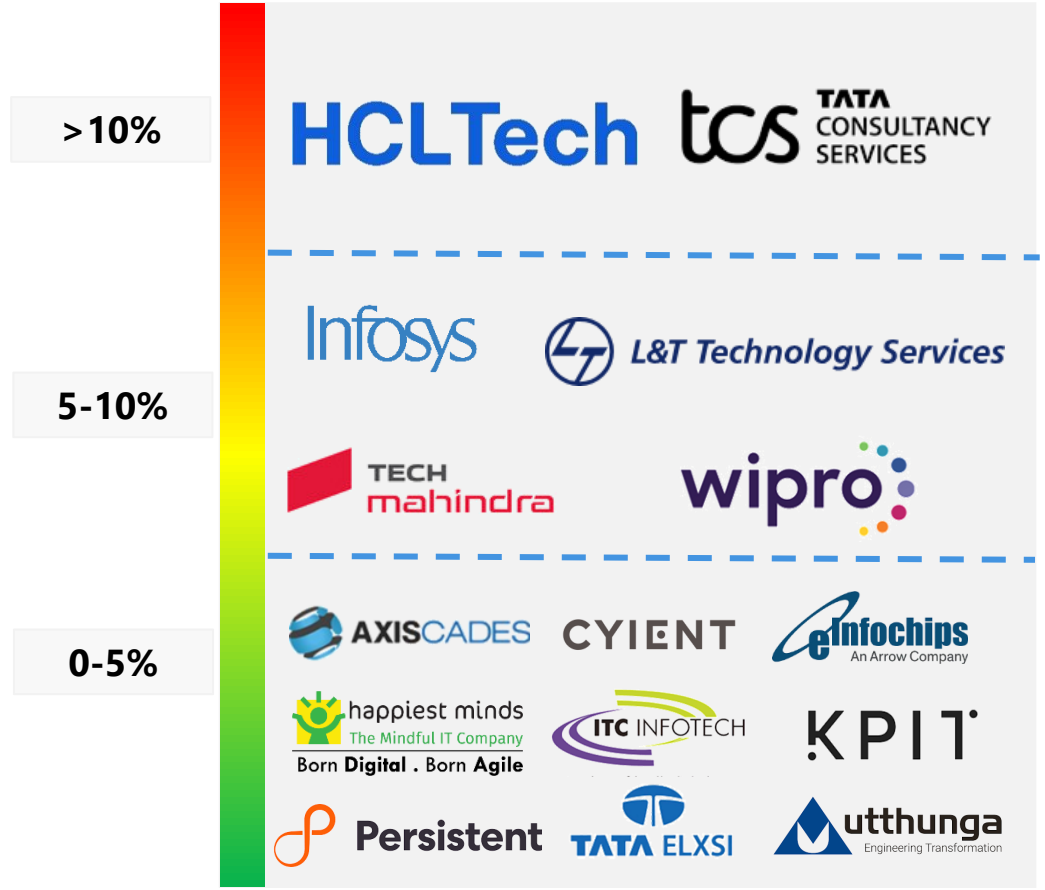
Category	Supplier	Reason
Transformation Pioneer	TECH mahindra	Broad capability mix covering engineering services, automation, and process engineering, with asset management integrated into managed services and long-term operational programs, particularly where continuous engineering support is required.



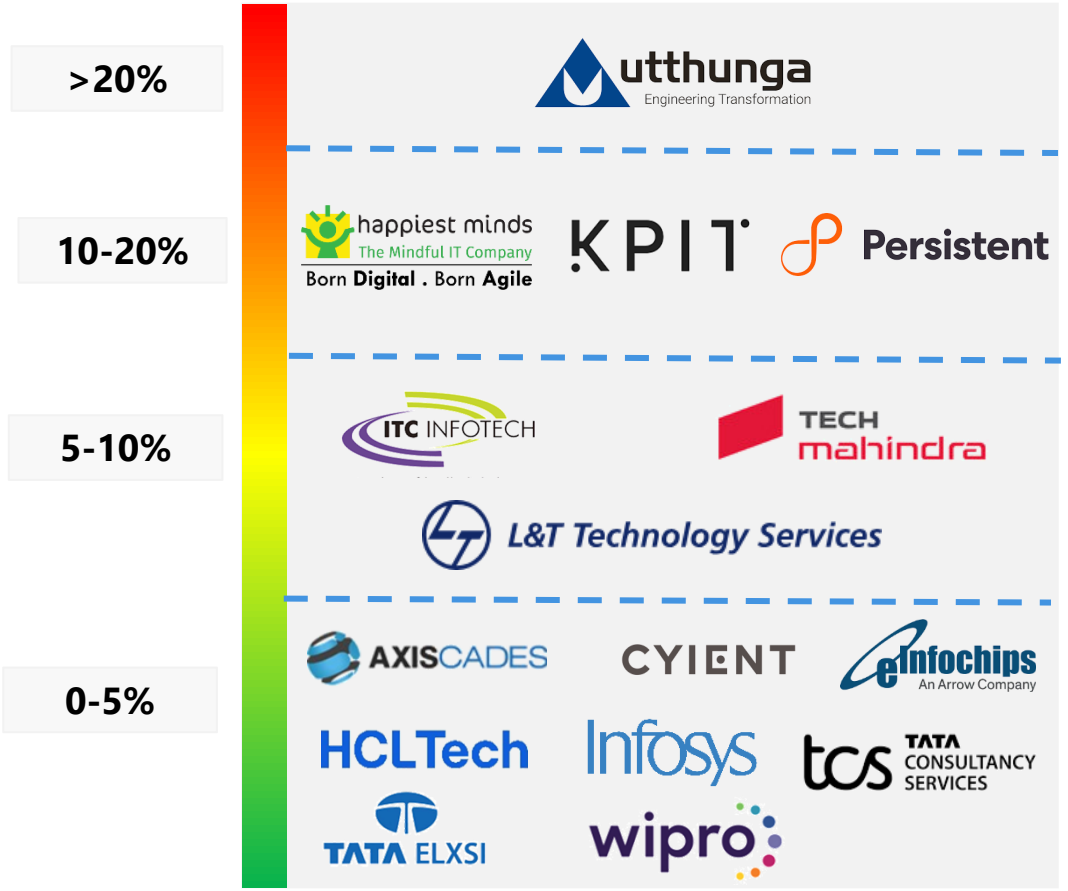
Engineering Service Providers Landscape

Of the 15 suppliers assessed, HCL Technologies, Infosys, L&T Technology Services, Tata Consultancy Services, Tech Mahindra, and Wipro together account for more than two-thirds of the engineering services market.

Market Share of Suppliers



YoY Growth of Suppliers



Note: The market share and YoY growth data are for 2024 and the suppliers mentioned in each category are in alphabetical order
Source: ARC Advisory Group

Author

Karthik Umachigi, *Senior Analyst*

Karthik has experience in market research, strategic consulting, and go-to-market strategy, with a focus on the technology sector since 2019. He has worked with a leading market research firm and a management consulting startup, supporting technology providers and enterprise buyers across the Asia Pacific region in navigating digital transformation initiatives. His core expertise is in artificial intelligence and generative AI within APAC, where he has authored market research reports, delivered briefings to technology buyers, and led custom research engagements addressing client-specific and ad hoc requirements.

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Rajkumar Paira, *Director of Research*

Rajkumar has been part of the ARC team since 2015 and currently leads a team of researchers delivering in-depth analysis across industrial process equipment and control systems, automation and IT, engineering services, Industrial IoT, and digital transformation. He is responsible for overseeing the planning, development, and execution of research initiatives, ensuring alignment with ARC's strategic objectives and research standards.

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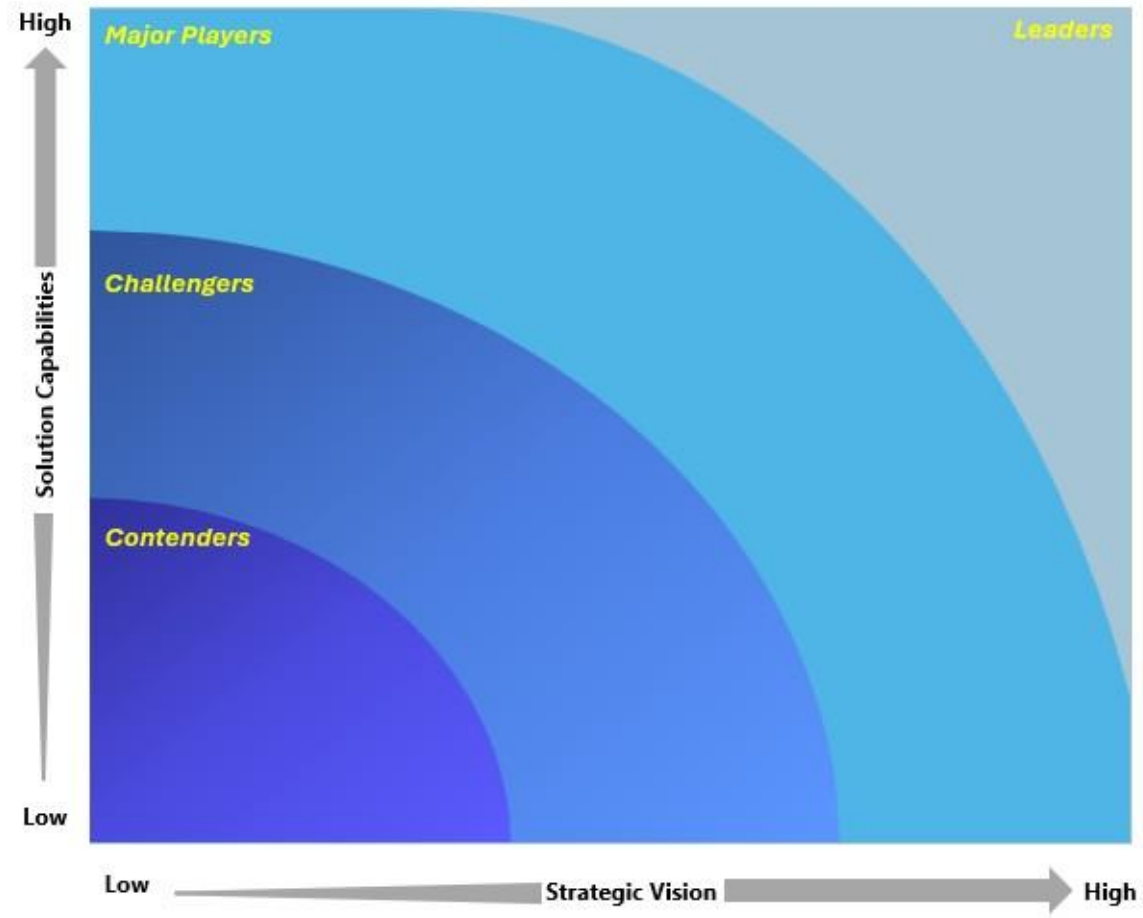
Appendix

ARC MarketMap Framework

ARC MarketMap Framework

- **Technical Capabilities**
- **Functional Capabilities**
- **Execution & Support Services**

This is represented through the supplier's product and service capabilities across the following parameters.



This is represented through subdimensions that reflect the supplier's visibility in the market.

- **Product Vision & Strategy**
- **Corporate Strategy**
- **Customer Base**

ARC MarketMap Framework

Suppliers are evaluated across two primary dimensions—**Solution Capabilities** and **Strategic Vision**—each weighted equally at 50 percent. The overall score is calculated based on the weighted aggregation of the respective sub-parameters under each dimension.

SOLUTION CAPABILITIES		STRATEGIC VISION	
Sub Parameters	***Weightage***	***Sub Parameters***	***Weightage***
Technical Capabilities	15%	**Product Vision & Strategy**	15%
Functional capabilities	20%	**Corporate Strategy**	25%
Execution & Support Services	15%	**Customer Base**	10%
Total	50%	**Total**	50%

About ARC Advisory Group

Founded in 1986, ARC is a global research and advisory firm specializing in AI, digitalization, and sustainability across industrial, energy, and infrastructure sectors. The firm operates globally, with offices in the US, Canada, the UK, Europe, the Middle East, Japan, China, Singapore, India, and Brazil.

What We Do

For Technology Users:
ARC provides strategic advisory services spanning digital transformation, sustainability, executive insights, technology evaluation, consulting, training, and industry forums.

For Technology Providers:
ARC supports technology providers through market intelligence, strategic planning, marketing and consulting services, and access to its global forums and summits.

Expertise & Coverage:

ARC's research spans a broad set of domains, including AI and ML, Industrial IoT, cybersecurity, asset management, supply chain, energy transition, digital twins, and related areas. Industry coverage includes aerospace, automotive, chemicals, consumer packaged goods, energy, life sciences, logistics, mining, oil and gas, smart cities, water, and other asset-intensive sectors.

Community & Events:

ARC engages the global industrial community through initiatives such as ARC Viewpoints newsletters, the Digital Transformation Council, open digital ecosystem programs, and global forums held across the US, Europe, India, Japan, and Singapore. The firm collaborates with more than 30,000 executives, 1,500 journalists, and leading industry organizations worldwide.

Why ARC Advisory Group?

ARC Advisory Group combines deep industry expertise, pragmatic thought leadership, and an experienced, collaborative analyst team. The firm offers a comprehensive range of services, including strategic advisory, technology and supplier selection, best-practice frameworks, market intelligence, and consulting. By working closely with clients, ARC effectively extends internal teams and helps accelerate informed decision-making and value creation.

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