

Intelligent Robotics and Physical AI Services

A research report comparing provider strengths,
challenges and competitive differentiators

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Embodied intelligence is reshaping robotics into scalable enterprise systems

Purpose, definitions and context:

This report analyzes the rapid convergence of robotic execution and physical AI intelligence, marking a structural inflection in enterprise automation. Historically, robotics focused on mechanization and task automation; today, physical AI is the dominant value driver, accounting for approximately 60 percent of enterprise differentiation and future ROI, with hardware and integration forming the remaining 40 percent.

ISG focuses on the physical AI layer because the next phase of AI is embodied AI. Robotics and autonomous systems require tight software-hardware-manufacturing integration. China, known as the world's factory, is rapidly embedding AI into physical systems, while the U.S., after decades of

offshoring, is redeploying hardware augmented by extensive IT capabilities. This shift is compounding manufacturing output.

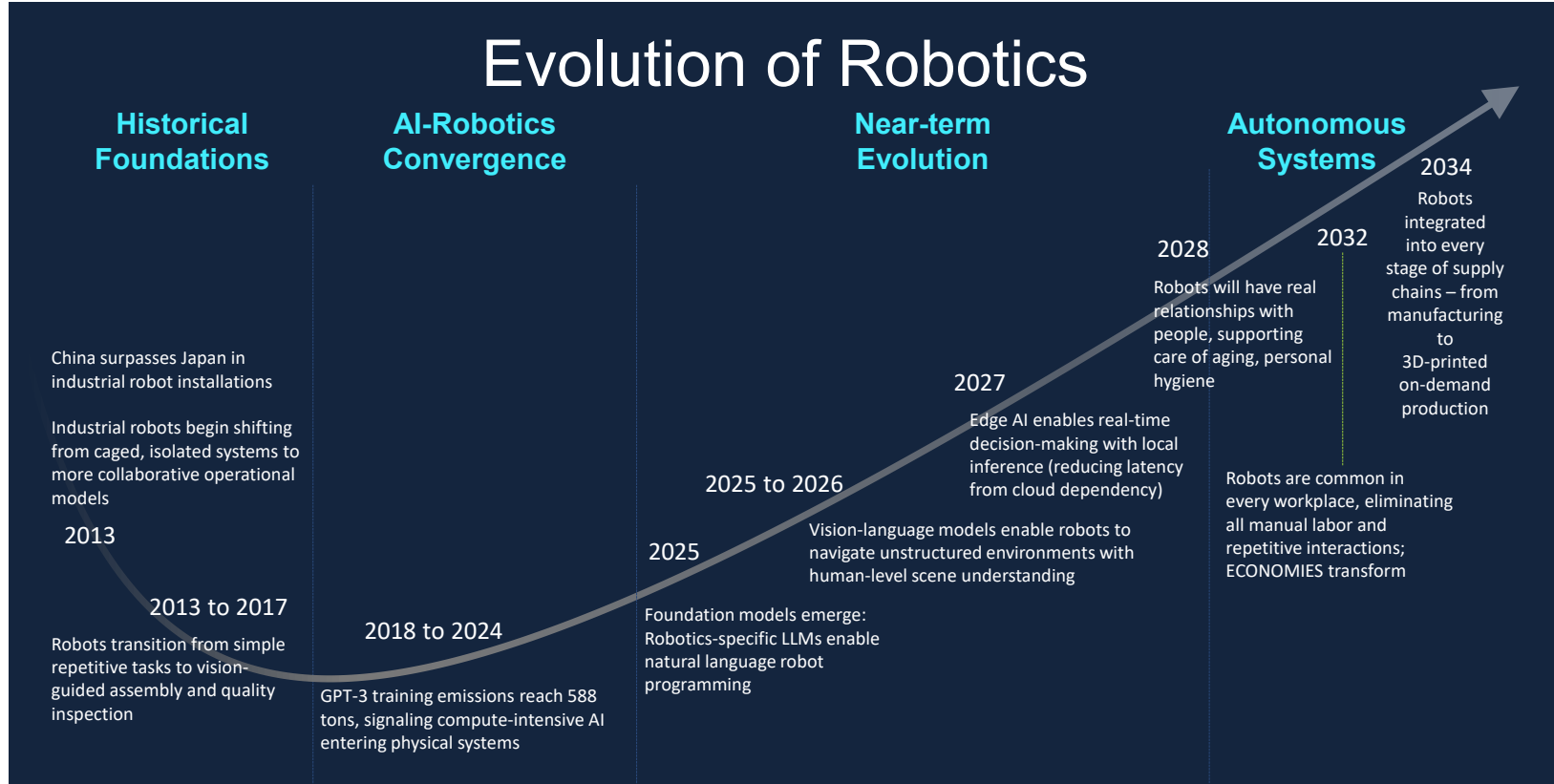
Consumers, enterprises and universities form feedback loops: real-world use improves products, driving adoption that further advances AI. This is visible across fintech, e-commerce, and logistics; the pattern now extends to physical AI. For general-purpose technologies, first-mover advantage in application often beats first-mover advantage in research. Infrastructure adoption creates lock-in and shapes standards; whoever defines defaults controls markets, regardless of who has the best technology.

Evolution of Robotics & Physical AI:

Physical AI and robotics have evolved from isolated pilots into enterprise-wide transformation levers spanning manufacturing, logistics, healthcare, and infrastructure. ISG defines physical AI as a framework integrating visual perception, spatial reasoning, and action-centric decision-making in a single system — going beyond standard visual

Physical AI is
transforming
robotics **from**
tools into
intelligent and
orchestrated
enterprise platforms.





Source: ISG, 2026



recognition to interpret complex, multi-view observations. Closely related, embodied AI refers to intelligence that emerges through active interaction with environments rather than abstract data processing. While promising, current embodied AI remains largely confined to controlled settings, breaking down when faced with unpredictable, real-world conditions.

Enterprises are no longer debating adoption; they are asking how to scale responsibly, integrate autonomy into legacy environments, and deliver measurable business value while meeting regulatory, safety and governance requirements. This report examines market evolution, provider responses, and how enterprises should prioritize, integrate and govern physical AI deployments over the next three to five years.

Thus, the purpose of this study is to help enterprise leaders, technology buyers and service providers understand how AI-driven perception, reasoning and action are redefining robotics from static automation into adaptive, learning and outcome-driven systems. The aim is to map the competitive

landscape of physical AI in robotics, identify key players and technologies, and guide strategic positioning for organizations investing in next-generation autonomous systems. The study evaluates how providers are enabling this shift through consulting, engineering and managed services models across industrial, commercial and service environments.

ISG covers providers across Consulting and Transformation Services, Integration and, and Managed Services and Robotics as a Service quadrants within this study.

Market snapshot:

In 2025-26, the market narrative shifted from *AI for analytics* to *AI that acts in the physical world*. Advances in vision-language-action (VLA) models, multi-modal foundation models, edge inference and closed-loop telemetry now enable robots to perceive context, reason about tasks and adapt behavior in real time. As a result, enterprises are moving beyond isolated pilots to scaled, orchestrated fleets of intelligent machines embedded in core operations.

Market sizing, efficiency gains with rise of AI models:

Physical AI extends GenAI with an understanding of 3D space and physical dynamics, trained heavily in simulation and digital twins, allowing autonomous machines to safely perceive, reason and act in real time. It is moving robotics from fixed, caged automation to software-defined, AI-orchestrated systems across logistics, surgery, construction, data centers, infrastructure inspection and security, creating a large, rapidly forming services opportunity for consultancies, integrators and robotics-as-a-service (RaaS) providers. The market is transitioning from asset-centric robotics investments to platform- and service-led physical AI ecosystems, where value is measured by uptime, productivity, safety and business outcomes rather than unit deployments.

Some of the regional observations:

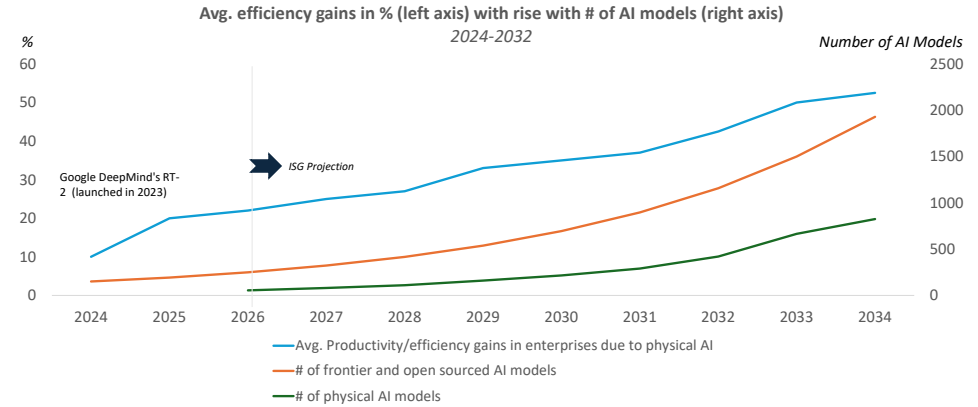
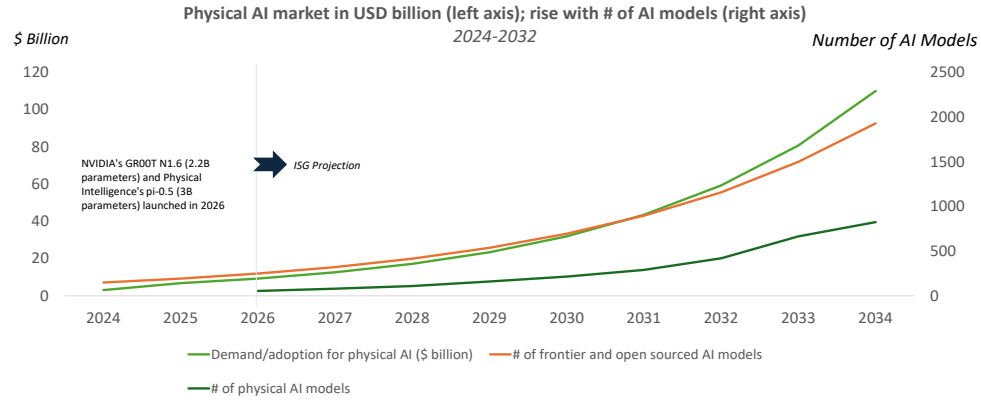
- **North America:** Rapid warehouse automation expansion and private capital investment in robotics ecosystems, along with strong hyperscaler and AI platform influence
- **Europe (DACH, Nordics):** Emphasis on regulatory compliance, data sovereignty and industrial cybersecurity with a strong manufacturing digitalization push
- **APAC:** Manufacturing scale and electronics ecosystems driving embedded AI and robotics adoption with government-backed industrial modernization initiatives
- **Middle East:** Infrastructure modernization into airport and utility automation investments with state-backed innovation funding

Scope exclusions:

Humanoid and general-purpose robots are not the focus of this ISG report. The emphasis on humanoid platforms, such as Agility Robotics, Figure AI and Apptронik, is excluded, even though they are attracting large early-stage



Executive Summary



rounds as mega-funding clusters around humanoid coworker bots and robot brains. Some platforms, such as Agility Robotics and Boston Dynamics, remain early-enterprise, not mass-deployment, with limited proven use cases. Robotic process automation initiatives from the last decade are also out of scope, as are B2C-only robotics use cases.

Top industry and technology trends (supply side):

- **Physical AI as the control plane:** Intelligence is shifting upstream from robot-level programming to AI models that translate intent into action across multiple embodiments. Control planes, such as OmniCore™, Isaac™ and LocusOne™, increasingly outperform single machines. In comparison to the LLMs, which rely on massive token datasets, physical AI models require *world models* that process high-bandwidth visual, spatial, and tactile data. Their reliance on edge platforms is higher for low-latency inference (and aligned with the robotic edge compute use cases).
- **Foundation models meet industrial reality:** VLA and embodied AI models are moving from research labs into constrained, safety-certified production environments. Physical AI models are increasingly trained in high-fidelity digital twins using standards like OpenUSD and platforms such as NVIDIA Omniverse and Isaac Sim, which generate massive synthetic datasets for robotics, autonomous vehicles (AVs) and industrial fleets.
- **From pilots to fleets:** Enterprises demand orchestration, interoperability and lifecycle management across heterogeneous robots. Telemetry and continuous learning loops are the new competitive moat, with some innovation-focused companies indicating where managed services are heading.
- **RaaS and outcome-based models accelerate adoption:** Consumption-based pricing is replacing CapEx-heavy robotics investments. RaaS is becoming the scaling unlock, and companies such as Locus, OTTO and Symbolic are winning because CapEx avoidance matters to customers.
- **Focus on integration depth over hardware innovation:** Providers with strong IT/OT, cloud edge and data integration capabilities outperform pure-play robotics companies.
- **From perception to autonomy, leading to collaboration:** From surgical robots performing complex procedures without human assistance to autonomous drones handling infrastructure inspections and last-mile deliveries, AI-powered machines are increasingly operating independently across industries — reducing crime, streamlining logistics, and matching expert human performance.
- **Safety, security and cyber-physical risk:**
 - Industrial safety standards such as ISO 10218, ANSI/RIA R15.06 and OSHA guidance, together with emerging cyber regulations, including IEC 62443 and the EU Cybersecurity Act, are now front and center for robot deployment.
 - Cybersecurity incidents in manufacturing are rising; one study cited by C2A reports that 80 percent of manufacturers experienced more security incidents last year, with potential losses of up to \$2 million per cyberattack, while only 45 percent feel adequately prepared.

Major opportunities and challenges:

Opportunities

- **Addressing labor gaps and repetitive, high-risk and low-value work:** Data centers, logistics, construction and food processing exhibit strong demand for robots to handle monotonous or hazardous tasks, freeing humans for higher-value work.
- **New service models:** Autonomous security robots such as Knightscope's K5 operate 24/7 with AI-based threat detection and telemetry, reporting up to a 46 percent reduction in crime reports in certain deployments. These outcomes validate RaaS models that integrate hardware, software and monitoring services. Monetizing physical AI through analytics, optimization and continuous learning presents an even larger opportunity.



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- **Infrastructure and logistics:** Walmart has completed over 150,000 drone deliveries since 2021 and is expanding to more U.S. states, signaling mainstream adoption and offering a template for urban and last-mile drone operations. Improving resilience, throughput and safety across logistics, manufacturing, healthcare and utilities is becoming a central focus.

Challenges

- **Integration complexity:** Enterprises face difficulties integrating heterogeneous fleets, such as drones, automated guided vehicles (AGVs) and autonomous mobile robots (AMRs), cobots and humanoids, with enterprise resource planning (ERP), manufacturing execution systems (MES), warehouse management systems (WMS) and safety systems, as well as validating AI behavior in dynamic environments. Scaling beyond proofs of concept remains a significant obstacle.
- **Talent and governance gaps:** Many enterprises lack the internal expertise to manage robot safety standards,

cyber-physical risk, AI model governance and change management for mixed human-robot workforces.

- **Safety, compliance and predictability concerns:** Advanced use cases, such as agentic manipulation, humanoids and multi-agent orchestration, should proceed only once governance frameworks, assurance processes and orchestration maturity are established.

Competitive landscape:

- Technology leaders such as NVIDIA are building full stacks for physical AI, including simulation, world foundation models, sensor simulation, and digital twins, while fostering an ecosystem of robotics OEMs and software providers that are adopting OpenUSD-based workflows.
- Robotics OEMs span multiple categories, including industrial and mobile platforms (AMRs, drones and inspection robots), humanoids, and domain-specific systems for use cases such as surgical applications, construction, data centers and security.

- Service providers, comprising consultancies, systems integrators and managed RaaS operators, are differentiating on industry-specific frameworks, safety and cybersecurity expertise, fleet orchestration platforms, and AI and ML engineering capabilities, rather than on hardware alone.

Data-driven KPIs include time-to-inspection (bridges, roads) and inspection coverage versus regulatory cycle; uptime, MTBF/MTTR and throughput per robot versus human baselines in warehouses, construction and data centers; security incidents per site, time-to-detect, and number of patrols per shift for security robots and drones; fleet uptime and mean time to resolution (MTTR); task completion accuracy and exception rates; AI learning velocity (time to skill acquisition across robots); energy efficiency and sustainability metrics; and workforce augmentation and redeployment outcomes.

Service providers are responding through four dominant strategic patterns:

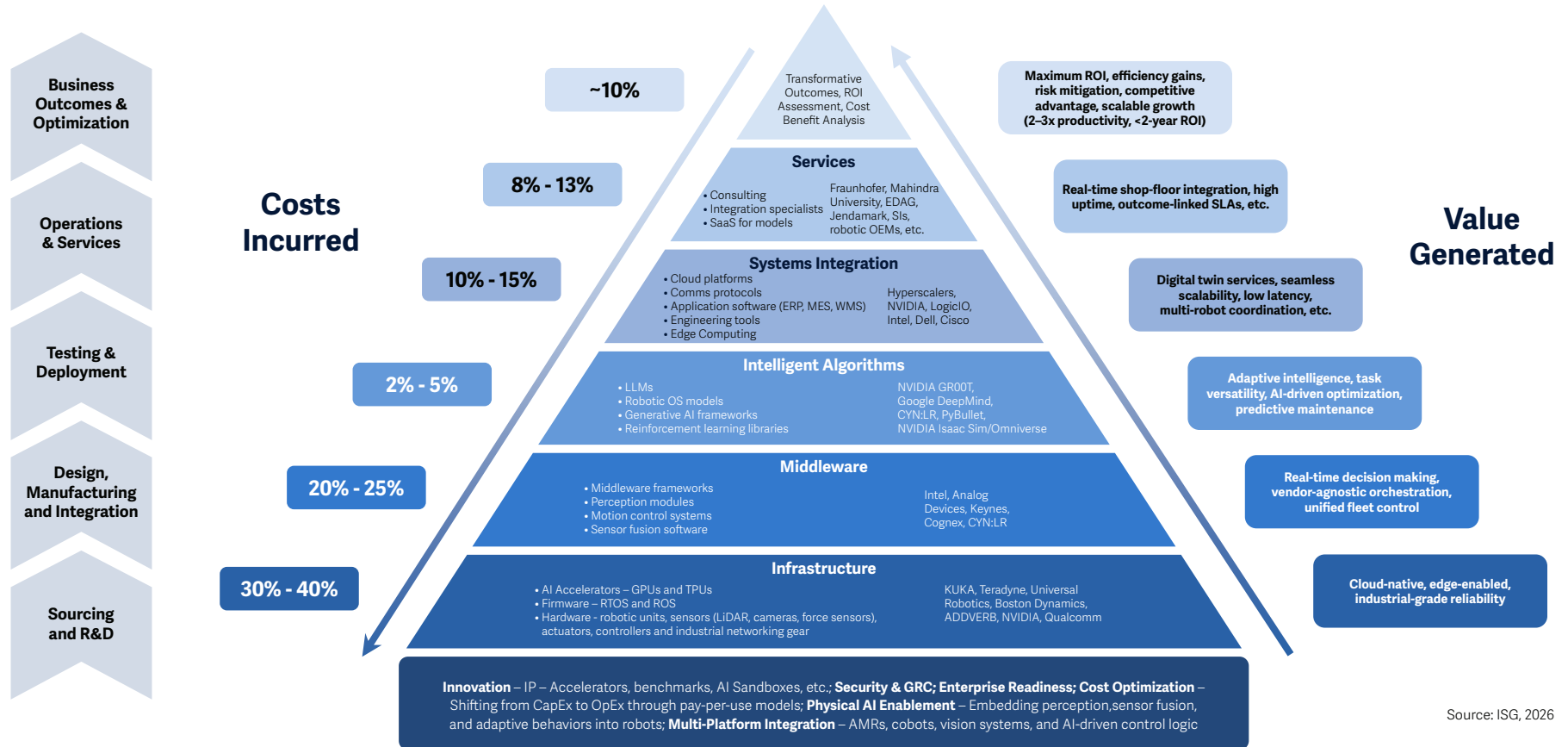
1. Shifting from integrator to orchestrator:

Leading providers are assuming prime contracting and lifecycle ownership, delivering multi-OEM fleet orchestration and providing digital twin and autonomy integration capabilities with edge AI and governance partnerships. Rather than selling robots, they increasingly own design and simulation, engineering, integration, orchestration, managed operations and KPI accountability. Multi-agent AI orchestration layers, conversational AI for industrial control interfaces and AI agents supervising robotic workflows are seen amongst some of the leaders.

2. Building edge and hybrid cloud

architectures: Providers are integrating agentic systems into complex legacy environments and moving decision layers closer to the edge while maintaining cloud analytics for fleet-wide learning and API-based integration with ERP, MES, WMS and CMMS. They are also preserving OT segmentation and network security constructs. Successful models follow a





Source: ISG, 2026



layered architecture, including sensors and devices, the physical robot layer, the communications layer, the cloud/analytics layer, and the decision and orchestration layer, to reduce integration shock and enable incremental autonomy scaling.

3. Managing cost and ROI expectations:

Providers are using simulation-first planning (digital twins before deployment), concept-of-operations frameworks, predictive fleet sizing, pay-per-use and subscription models, and outcome-based SLAs. Best practice is staged adoption that digitizes trial-to-production workflows, prioritizes brownfield optimization before greenfield rebuilds, and delivers ROI validation within 12-24 months. Enterprises should avoid large, multi-line autonomy rollouts without orchestration maturity and hardware-first approaches that create vendor lock-in.

4. Prioritizing governance and regulatory alignment:

As autonomy increases, providers are strengthening cybersecurity certifications, such as ISO 27001, SOC 2 and IEC 62443, aligning on functional safety,

incorporating human-in-the-loop supervisory controls, providing explainability and logging frameworks, and adopting regional data hosting. Forward-looking providers embed governance into architecture, rather than treating it as post-deployment compliance. At all levels, providers also focus on RaaS, run-and-transfer engagements, managed fleet services as well as hybrid hardware and autonomy subscription models.

Vertical insights:

- **Physical AI is reshaping industries across the board:** surgical robots are augmenting surgeons in the operation room, while AI-powered drones and security robots improve infrastructure inspection and public safety. In logistics, mobile robots, and drone delivery networks — led by deployments like Walmart's — are becoming mainstream, and autonomous heavy equipment is transforming high-risk construction and energy work. Meanwhile, data centers are moving toward lights-out operations, food handling robots are mastering complex picking tasks using synthetic training

data, and security robots are delivering measurable crime reductions through 24/7 AI-powered patrols.

Linkage to CxO priorities:

- **Growth and CX:** Faster, safer and more reliable operations in retail, logistics and healthcare translate to better customer outcomes, including faster deliveries, fewer outages and safer environments.
- **Cost and productivity:** Robots improve throughput, asset utilization and inspection coverage while mitigating labor shortages and overtime.
- **Risk and resilience:** Safety-first and cyber-secure robotics reduce operational risk, support regulatory compliance and help prevent large cyber loss events.

Physical AI should be a core pillar of enterprise automation and AI roadmaps, tightly integrated with data platforms (telemetry, logs and video), cloud and edge computing, rather than a standalone OT initiative.

Call to action:

- Physical AI is shifting robotics from isolated automation cells to networked, AI-defined machines across warehouses, hospitals, data centers, infrastructure and cities. Market projections, VC investment and early deployments indicate a decade of rapid growth, led by humanoids and domain-specific autonomous systems.
- The market is shifting from single-robot deployments to multi-agent orchestration platforms. Fleet management, digital twins and AI-driven decision layers will be key differentiators.
- Enterprises will adopt agentic systems in phases: tool-level augmentation, AI assistants, supervised AI agents, semi-autonomous AI workforce and fully agentic enterprise orchestration. Regulated industries will progress more cautiously and require strong audit trails and override controls.



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- Providers that can integrate heterogeneous robot fleets, connect IT, OT and AI seamlessly, assume KPI accountability and demonstrate production-grade scale will outperform niche robotics providers.

To scale physical AI responsibly, enterprises should focus on high-ROI, low-risk use cases — like intralogistics robots, inspection drones, and autonomous cleaning — while building integration layers, digital twins, and governance frameworks early. Success won't come from deploying the most robots first, but from integrating autonomy intelligently, securely, and measurably across the value chain.

Robotics is at an inflection point: intelligence is shifting from scripted automation to physical AI that perceives, reasons and acts in real environments. Enterprises are transitioning from pilots to orchestrated fleets, measured by uptime, safety and outcomes. Winners will embed telemetry, digital twins and governance into their architectures to scale autonomy securely over the next 3-5 years.





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
ABB Robotics	Not In	Leader	Not In
Accenture	Leader	Leader	Not In
Aethon	Not In	Not In	Contender
American Robotics	Not In	Not In	Product Challenger
Arthur D Little	Product Challenger	Not In	Not In
Atos	Product Challenger	Not In	Not In
Baringa	Contender	Not In	Not In
Bastian Solutions	Not In	Leader	Not In
BCG	Leader	Not In	Not In
BearingPoint	Contender	Not In	Not In





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
BERKSHIRE GREY	Not In	Not In	Product Challenger
Bluewhite	Not In	Not In	Contender
Booz Allen Hamilton	Leader	Not In	Not In
Bosch	Not In	Product Challenger	Not In
Boston Dynamics	Not In	Product Challenger	Not In
Brain Corporation	Not In	Not In	Leader
Capgemini	Leader	Leader	Not In
Cobalt AI	Not In	Not In	Product Challenger
Daifuku	Not In	Leader	Not In
Deloitte	Leader	Not In	Not In





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Delta Electronics	Not In	Market Challenger	Not In
Diligent Robotics	Not In	Not In	Market Challenger
Dürr	Not In	Product Challenger	Not In
eInfochips	Not In	Product Challenger	Not In
Exyn Technologies	Not In	Contender	Not In
EY	Leader	Not In	Not In
FANUC	Not In	Market Challenger	Not In
Formic Technologies	Not In	Not In	Leader
FORTNA	Not In	Product Challenger	Not In
Fraunhofer IPA	Product Challenger	Not In	Not In





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Fujitsu	Product Challenger	Product Challenger	Not In
Geek+	Not In	Not In	Rising Star ★
Grenzebach	Not In	Contender	Not In
GreyOrange	Not In	Not In	Leader
HCLTech	Product Challenger	Leader	Not In
Hitachi Digital Services	Leader	Leader	Leader
Honeywell Robotics	Not In	Leader	Not In
IBM	Leader	Not In	Not In
ICE Cobotics	Not In	Not In	Product Challenger
Indoor Robotics	Not In	Not In	Product Challenger





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Infosys	Leader	Leader	Not In
Kiwibot	Not In	Not In	Contender
KNAPP	Not In	Leader	Not In
Knightscope	Not In	Not In	Leader
KPMG	Market Challenger	Not In	Not In
KUKA	Not In	Market Challenger	Not In
Locus Robotics	Not In	Not In	Leader
LTM	Not In	Rising Star ★	Not In
McKinsey & Co.	Leader	Not In	Not In
Miso Robotics	Not In	Not In	Contender





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Nilfisk	Not In	Not In	Market Challenger
Nomagic	Not In	Not In	Leader
NTT DATA	Product Challenger	Not In	Not In
Ocado Intelligent Automation	Not In	Product Challenger	Not In
Oliver Wyman	Contender	Not In	Not In
Omron Automation	Not In	Contender	Not In
OTTO (Rockwell Automation)	Not In	Not In	Leader
PA Consulting	Product Challenger	Not In	Not In
Percepto	Not In	Not In	Leader
PwC	Leader	Not In	Not In





Provider Positioning

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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Rockwell Automation	Not In	Product Challenger	Not In
Roland Berger	Market Challenger	Not In	Not In
SIASUN	Not In	Product Challenger	Not In
Siemens	Leader	Not In	Not In
Slalom	Contender	Not In	Not In
SMP Robotics	Not In	Not In	Contender
SoftBank Robotics	Not In	Not In	Leader
SSI SCHÄFER	Not In	Leader	Not In
Swisslog	Not In	Leader	Not In
Symbotic, Inc.	Not In	Leader	Not In





Provider Positioning

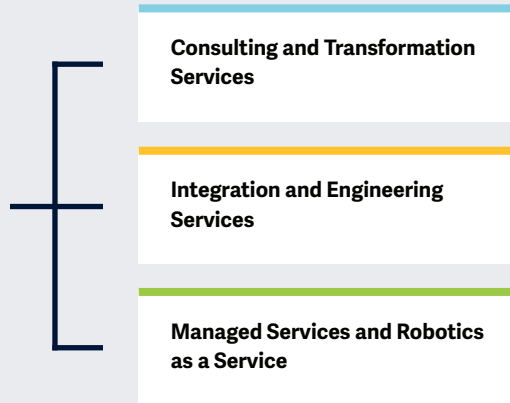
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	Consulting and Transformation Services	Integration and Engineering Services	Managed Services and Robotics as a Service
Tata Elxsi	Not In	Contender	Not In
TCS	Rising Star ★	Product Challenger	Not In
Tech Mahindra	Not In	Product Challenger	Not In
Tennant Company	Not In	Not In	Market Challenger
ThoughtWorks	Contender	Not In	Not In
T-Systems	Not In	Product Challenger	Product Challenger
Vecna Robotics	Not In	Not In	Rising Star ★
Wipro	Product Challenger	Not In	Not In
Zebra	Not In	Not In	Leader



This study focuses on what ISG perceives as most critical in 2026 for **intelligent robotics and physical AI services**.

Simplified Illustration Source: ISG 2026



Definition

This study examines service providers across the rapidly evolving frontier of intelligent robotics and physical AI services, spanning strategic consulting, engineering integration and managed robotics operations. These providers help enterprises reimagine, deploy and scale robotics capabilities that now define automation, resilience and augmented workforces across both industrial and commercial landscapes.

Robotics adoption is accelerating beyond factory walls, as enterprises demand intelligent, adaptive systems that merge invisibly with IT/OT ecosystems. From vision-led transformation road maps to full-stack engineering and outcome-driven service models, organizations now seek robotics offerings that are scalable, vendor agnostic and tailored to each vertical. The convergence of robotics, AI and telemetry is redefining automation, pushing businesses from isolated deployments toward orchestrated, self-optimizing fleets.

Providers combining deep advisory intelligence, precision integration and flexible consumption models are emerging as the real differentiators. They unlock long-term value by transforming robotics into a utility, embedding cognition into industrial networks and steering enterprisewide reinvention. The urgency is no longer about if robotics will scale, but how fast organizations can align AI, data and motion into a single intelligent fabric. Businesses that hesitate risk allowing their physical operations to lag behind their digital ambitions.

This study highlights how players are redefining physical AI, where consulting, engineering and managed services converge to challenge the future of work, where humans and machines share responsibilities.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services: Consulting and Transformation Services, Integration and Engineering Services, and Managed Services and Robotics as a Service.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and portfolio attractiveness
- Focus on the global 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.

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.

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.

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.





Consulting and Transformation Services

Who Should Read This Section

This report is valuable for service providers offering **Consulting and Transformation Services** globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief Strategy Officers

Should use this report to gain a comprehensive view of how Consulting and Transformation Services providers shape enterprise-wide robotics strategies before engineering or deployment begins. A deeper understanding of provider capabilities in robotics road mapping, reference architectures, co innovation models, industry specific frameworks and AI enabled perception and control systems supports informed strategic planning and scalable engineering decisions.

Chief Artificial Intelligence Officers

Should use this report to understand how Consulting and Transformation Services providers guide robotics strategy, readiness, operating models and ecosystem choices. Insights into governance, IT-OT integration, cloud-edge design, cybersecurity and network needs help align robotics programs with enterprise tech roadmaps for scalable, safe adoption.

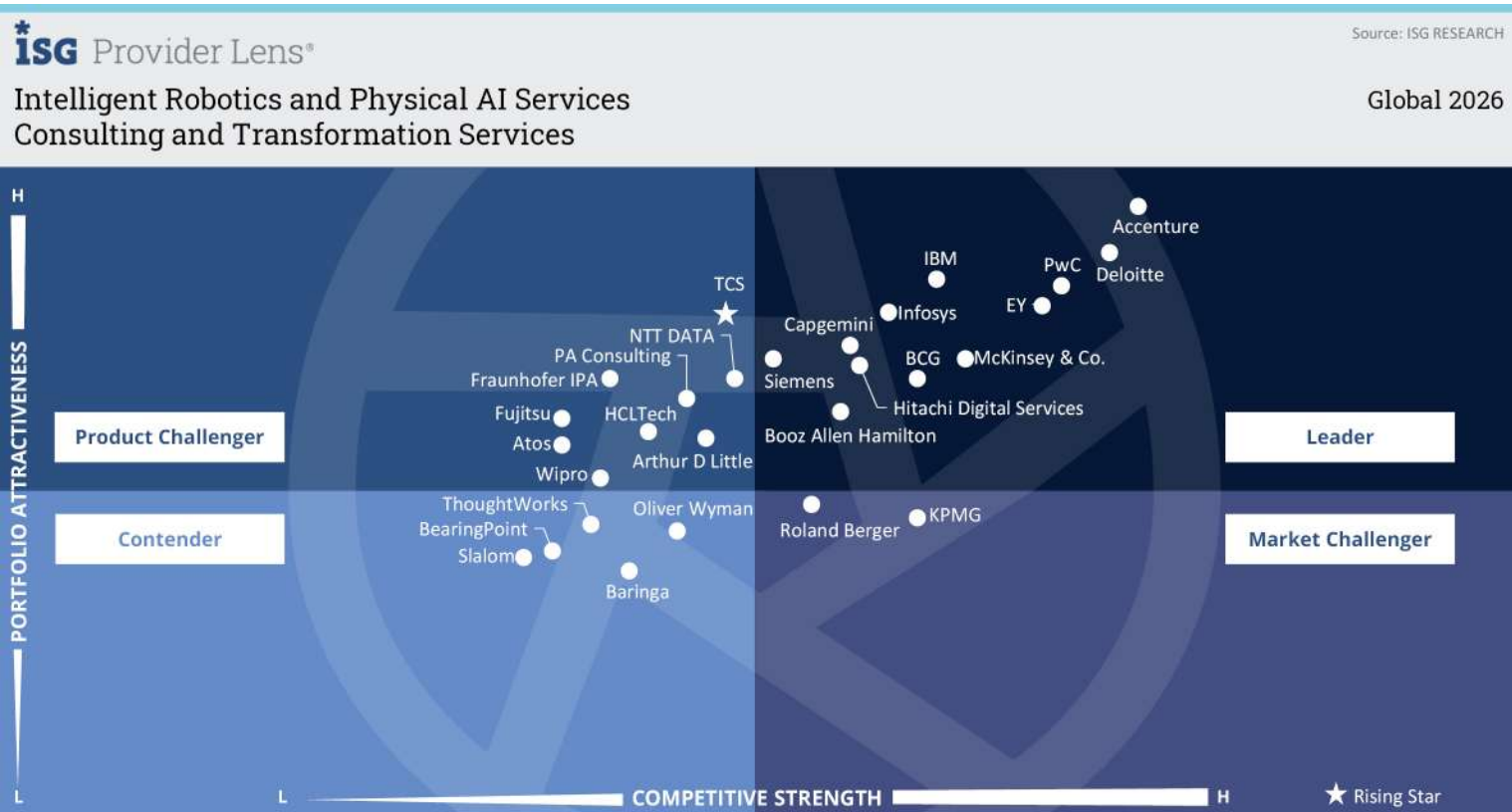
Chief Financial Officers

Should utilize this report to assess how Consulting and Transformation Services partners help quantify and validate the financial impact of robotics including ROI, TCO, business case development, sourcing strategies and risk mitigation across multi-site deployments. Understanding provider strengths in commercial model design, cost optimization and long-term value realization supports more informed investment decisions, capital allocation and partnership structuring

Supply Chain leaders

Should use this report to better understand the global landscape of Consulting and Transformation Services providers, including their commercial constructs and ecosystem roles across industries. A deeper understanding of provider differentiation in domain expertise, delivery models, pricing approaches and risk-sharing mechanisms supports more informed partner selection, competitive negotiations and contract governance.





This quadrant evaluates advisors guiding enterprises from **robotics ambition** to **execution-ready strategy**. Leading providers align **use cases, operating models and workforce transformation** with business outcomes, enabling clients to **scale beyond pilots** into core operations.

Yash Jethani



Definition

This quadrant evaluates providers offering advisory services to guide enterprises in defining and planning their robotics transformation strategy before engineering or deployment begins. These providers conduct readiness assessments, design target operating models, justify ROI, help shape commercial model choices and capacity planning, and prioritize use cases to align robotics investments with broader business and automation goals. Their approach is vendor-neutral and business-led, combining governance, safety and workforce enablement with change management from the outset. Leading providers demonstrate a deep understanding of robotics applications across verticals, offering industry-specific frameworks, benchmarks and accelerators that translate use cases into scalable programs that fit into a larger enterprise automation fabric. They also advise on AI-enabled perception and control systems to support sustainable, human-centric robotics adoption with an ecosystem blueprint.

Eligibility Criteria

1. Deliver **robotics strategy and road map consulting** with evidence of enterprise-wide engagements prior to system design or deployment, including **reference architecture blueprints** for connectivity and data readiness
2. Demonstrate **use case assessment frameworks** that quantify process suitability, ROI, TCO analysis, long-term sourcing strategy and risk across multiple industries
3. Provide **industry-specific accelerators, benchmarks or reference architectures** to scale robotics from proofs of concept to multisite deployments across verticals such as manufacturing, logistics, healthcare and retail
4. Offer **governance, safety and compliance frameworks** for embedding physical AI and **human-robot collaboration** into operations
5. Integrate **organizational change and workforce enablement services** into robotics transformation programs
6. Maintain **vendor-neutral partnerships and ecosystem knowledge** to ensure objective technology selection, excluding roles as a robotics OEM or an engineering contractor
7. Publish **thought leadership or maturity models**, establishing credibility in robotics transformation and AI-human collaboration



Observations

The market is shifting toward advisory-led scale programs that connect robotics/physical AI to enterprise productivity, safety and resilience, moving beyond one-off pilots. Providers are advancing on vision and execution by embedding governance, value engineering, and simulate before deploy digital twin practices into their playbooks. Advisory firms are strengthening lab capabilities, while industrial/OT players expand into consultative offerings. M&A remains selective, focused on tuck-ins in simulation, OT security and autonomy middleware, while partnerships outpace large acquisitions.

Most providers anchor robotics in enterprise economics (ROI/TCO, payback, throughput and safety KPIs) with portfolio roadmaps and stage-gate approaches. Digital twins and virtual commissioning mitigate sim-to-real gaps. Leading firms provide vendor-agnostic orchestration across edge-to-cloud, data and control layers with strong model governance, auditability and compliance. Domain knowledge

in asset-heavy industries and workforce enablement translate strategy into repeatable, multi-site rollouts.

Gaps remain. Many advisors rely on partners for mechatronics, OEM integration and fleet operations and lack robotics-specific safety certifications and robot operating system (ROS) expertise — an opportunity in safety-critical environments. Evidence of large, repeatable deployments and SLA-backed managed services remains uneven; clearer outcome-based pricing, RaaS/leasing and uptime commitments would strengthen confidence. Near-term wins include consistent benefit quantification, expansion beyond asset-intensive sectors into logistics/retail, and standards for multi-robot interoperability that align data layers with energy and ESG outcomes.

From the 79 companies assessed for this study, 28 qualified for this quadrant, with 12 being Leaders and one Rising Star.



Accenture is a global consulting leader in delivering robotics and physical AI transformation advisory, helping enterprises define strategy, governance and operating models to scale intelligent automation safely, ensure compliance and deliver measurable business impact.

BCG

BCG is a global consulting firm positioning robotics and physical AI at the core of industrial operations transformation. It defines strategy, value cases, governance and scale playbooks, with BCG X driving build and validate initiatives.

Booz Allen Hamilton

Booz Allen Hamilton is a federal-focused integrator of physical AI, autonomy and AI governance. It delivers cloud-edge architectures, digital twins and OT zero trust security, partnering with NVIDIA, Shield AI and Scout AI for mission-critical deployments.



Capgemini is a global consulting and engineering provider for robotics and physical AI transformation, emphasizing value engineering (ROI and TCO), lab-enabled architecture advisory (digital twin and edge AI) and ecosystem-driven GTM with leading enterprise and AI platforms.

Deloitte

Deloitte is a global consulting-led provider for physical AI and robotics transformation, with expertise in strategy, digital twin and simulation-based de-risking, ecosystem architecture across NVIDIA, Microsoft, AWS and Siemens, and AI risk governance. It is less oriented to proprietary robotics platforms or direct fleet operations.



Consulting and Transformation Services



EY offers consulting on physical AI and robotics transformation for enterprises globally. It combines NVIDIA-powered simulation and digital twin platform with value engineering, control tower governance and responsible AI, EHS and OT security framework.

Hitachi Digital Services

Hitachi Digital Services delivers robotics and physical AI consulting for asset-intensive industries globally. Through its One Hitachi model, it integrates strategy, operating model redesign and IP-based reference architectures to enable safe, scalable autonomy.



IBM offers robotics and physical AI transformation consulting with a focus on asset-centric strategy, digital twins and hybrid cloud orchestration, backed by trusted AI governance to scale autonomy across regulated, asset-heavy enterprises.



Infosys is a global consulting and technology services firm that embeds robotics and physical AI within enterprise AI and cloud transformation programs, leveraging Topaz™, Cobalt™ and strong responsible AI governance to help clients scale automation with financial and regulatory confidence.

McKinsey & Company

McKinsey & Company is a global management consultancy that advises enterprises on robotics and physical AI strategy, economics, governance and workforce transformation, embedding automation into Industry 4.0 and enterprise-wide productivity initiatives.



As a global consulting leader, **PwC** advises on robotics and physical AI transformation, focusing on economics, operating model, governance and risk controls. It embeds

robotics into enterprise modernization and agentic automation rather than developing a proprietary robotics engineering platform.

Siemens

Siemens delivers robotics transformation globally through an Industry 4.0 stack, combining Tecnomatix and NX digital twins, TIA/PLC-led integration, industrial edge and safety-certified automation. This enables manufacturers to blueprint, validate and scale robotics with measurable throughput and risk controls.



TCS (Rising Star) embeds robotics and physical AI into cognitive business operations, AI.Cloud and industrial transformation programs, guiding enterprises to deploy scalable, AI-driven automation across manufacturing and logistics sectors.





"Hitachi Digital Services is a top-tier leader for robotics and physical AI transformation tied to safety, reliability and decades-long asset lifecycles, bringing rare domain credibility through customer zero strategy and IP-led consulting."

Yash Jethani

Hitachi Digital Services

Overview

Hitachi Digital Services, headquartered in California, U.S., is a wholly owned subsidiary of Hitachi. It has employees spread across India, Vietnam, the U.S., the U.K. and Portugal. It primarily offers digital consultancy and technology services, covering cloud, data and IoT services. Under One Hitachi, Hitachi deploys NVIDIA AI factory capabilities globally, spanning DGX/B200, Spectrum X, Omniverse™/Cosmos™ and IGX edge infrastructure. It integrates these into OT to IT delivery for robotics/physical AI in regulated industries. With sensing proven across over 2,000 trains and 60 percent of revenue outside Japan, it offers scale and governance with NVIDIA, Microsoft, OpenAI and Google.

Strengths

Domain-anchored consulting: Hitachi Digital Services' customer zero model grounds its robotics advice in operating its own rail, factory and energy assets, embedding real constraints such as safety, uptime, maintenance and workforce into strategy. It prioritizes feasibility, risk reduction and lifecycle value beyond pilots.

Pilot-to-back office transformation:

Through One Hitachi Consulting, every engagement directly leverages Hitachi's IP, R&D and platforms (Lumada 3.0, HMAX, JR Automation and GlobalLogic). Teams map strategy to proven reference architectures, data pipelines and autonomy maturity stages used internally, shrinking strategy-to-execution gaps and clarifying cost, safety and scalability assumptions.

Long-horizon economics and operating

models: Hitachi Digital Services advises rail/energy clients across 30-year lifecycle assets, emphasizing total lifecycle economics, covering energy efficiency, predictive maintenance, inspection automation and reliability, over short-term ROI. This balances CapEx, regulatory requirements and service continuity.

Safety, reliability and autonomy governance

by design: Hitachi Digital Services embeds safety-by-design, autonomy boundaries and governance into transformation plans. It implements phased autonomy and human-in-the-loop models aligned to regulatory regimes, suited for sectors where autonomy failure carries public or national consequences.

Caution

Hitachi's consulting strength lies in infrastructure-led sectors. Hence, applicability to fast-cycle commercial logistics or retail robotics may be narrower. Its IP-anchored model can also reduce perceived vendor neutrality for clients seeking purely advisory engagements.





Integration and Engineering Services

Who Should Read This Section

This report is valuable for service providers offering **Integration and Engineering Services globally** 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.

Engineering and R&D leaders

Should use this report to assess how robotics integration partners design, engineer and scale intelligent physical systems across complex environments. Insights into providers' architectures, R&D maturity, co innovation models and roadmap alignment support strategic planning, technology prioritization and de-risked execution of enterprise-wide robotics and physical AI initiatives.

Physical AI and intelligent automation leaders, including CDAIOs, CIOs, CTOs and Chief Network Officers

Should use this report to evaluate providers that orchestrate robotics, edge AI and telemetry-rich systems. Insights into data pipelines, model governance, interoperability, security, networking and platform integration help align robotics with enterprise AI, IT and network strategies for scalable, compliant automation outcomes.

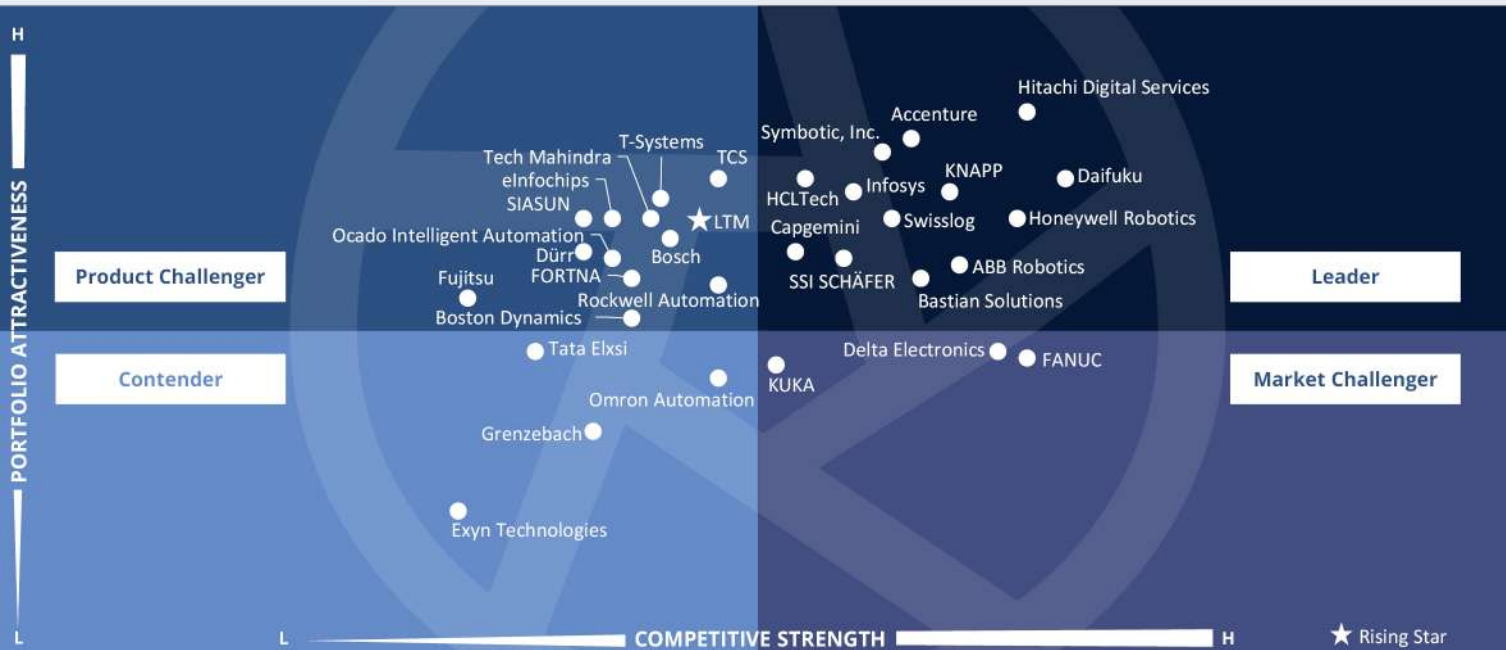
Chief Information Security Officers

Should use this report to assess how robotics integration partners secure interconnected robotic systems, edge AI workloads and telemetry pipelines. Insights into providers' cybersecurity frameworks, zero trust architectures, credential and device management, network segmentation and secure remote monitoring help CISOs ensure resilient, compliant and threat aware robotics deployments across distributed industrial and commercial environments.

Sourcing, procurement and vendor management professionals

should use this report to understand the global landscape of Integration and providers. Insights into pricing models, delivery constructs, TCO, contractual structures, risk sharing mechanisms and market traction support informed partner selection, negotiation and investment decisions, enabling financially optimized and scalable robotics deployments.





This quadrant evaluates robotics integrators **delivering scale** through **simulation-first engineering** and **multi-OEM orchestration**. Leading providers combine digital twins, IT-OT convergence and SLA-backed operations to move enterprises beyond pilots into production deployments.

Yash Jethani

Definition

This quadrant evaluates providers that design, engineer and deploy industrial and commercial robotics systems. Leading providers integrate diverse robotic platforms, including AMRs, cobots, automated storage, retrieval and vision systems, into enterprise workflows, enabling robots to perceive, adapt and act through AI-powered control logic and sensor fusion. They deliver engineering services such as PLC programming, robotics control logic and safety system integration, alongside the design and deployment of physical AI systems with real-time perception and decision-making. Their integration services include vertical-specific workflows, multirobot fleet orchestration, cross-vendor interoperability (VDA 5050, MassRobotics and OPC-UA), connectivity with ERP, MES and WMS systems, and post-deployment validation of AI-enabled robotic performance in dynamic environments. Some also provide patch and lifecycle management, recertification services and AI at the edge.

Eligibility Criteria

1. Deliver **robotics-specific engineering or integration services**, extending beyond hardware resale or component distribution
2. Demonstrate proven capabilities in **PLC programming, robotics control logic and safety system integration** across industrial or commercial environments
3. Show evidence of **vertical customization**, with **implemented solutions** in sectors such as **manufacturing, logistics, automotive and pharmaceuticals**
4. **Integrate multiple robotic platforms and physical AI components** with orchestration capabilities, leveraging ecosystem partnerships to scale deployments across multiple sites while maintaining proprietary engineering
5. Support **AI- or ML-driven telemetry** and edge inference to enable **zero-touch assurance**, predictive maintenance or CX optimization
6. Provide referenceable client implementations demonstrating **end-to-end integration**, commissioning and **measurable ROI**
7. Operate as a **service integrator** or **engineering partner**, providing full deployment, lifecycle support, telemetry-based recertification and secure remote monitoring, rather than acting primarily as a hardware OEM
8. Deliver **cloud-integrated** and **hybrid deployment options**, ensuring compliance with safety, data residency and regulatory requirements



Integration and Engineering Services

Observations

Integration and Engineering Services bifurcate between vertically integrated warehouse platforms and vendor-agnostic integrators stitching together multi-OEM fleets. ISG observed more providers improving execution via simulation-first engineering, brownfield commissioning and SLA-backed lifecycle services. Vision scores are rising where orchestration and digital twins are productized in real environments. M&A activity features divestitures and JVs to fund as-a-service models, tuck-ins for safety/human-robot interaction (HRI) and mobile robotics acquisitions, while partnerships with chipmakers, cloud and OT vendors outpace platform buys.

Providers deliver end-to-end systems anchored in digital twins for design, emulation and virtual commissioning. Orchestration is maturing from WMS, WES and WCS toward cross-fleet mission control with multi-protocol interoperability (ROS 2/RMF, OPC UA and VDA 5050), enabling mixed fleets. Most exhibit IT-OT convergence, integrating PLC/SCADA with edge AI and cloud

MLOps, alongside KPI-led value engineering (ROI/TCO and payback) and project-based maintenance services to support multi-site rollouts.

However, many integrators and engineers still rely on proprietary stacks, raising lock-in concerns; expanding multi-OEM interoperability will broaden addressability. Evidence of robotics safety certifications and depth in ROS remains uneven. Outcome-based commercial models and uptime guarantees are emerging but not uniform; standardizing SLAs would strengthen buyer confidence. Finally, expanding beyond warehouse-centric domains into industrial mechatronics, deepening autonomy and harmonizing data layers for ESG outcomes remain key upside opportunities.

From the 79 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

ABB Robotics

ABB Robotics is a global robotics OEM and integrator delivering turnkey industrial, collaborative and mobile robotic systems, powered by RobotStudio digital twins, OmniCore control and ABB Ability/Genix platforms, which are backed by safety-certified architectures and lifecycle services.



Accenture delivers large-scale integration and engineering through Industry X, combining digital engineering, AI orchestration, simulation and OT/IT integration to industrialize autonomous operations across manufacturing, logistics, energy and infrastructure.

Bastian Solutions

Bastian Solutions delivers vendor-agnostic warehouse automation that integrates robots, automated storage and retrieval systems (ASRS) and conveyors; validates ROI through TCO and simulation; and reliably executes in brownfield environments with end-to-end commissioning.



Capgemini positions itself as an engineering-led physical AI integrator, bridging robotics, AI, computer vision, digital twins and enterprise IT/OT. Through its AI Robotics & Experiences Lab and Capgemini Engineering, it prioritizes industrializing robotics deployments over advisory-only engagements.

Daifuku

Daifuku delivers end-to-end intralogistics automation, encompassing AMR/AGV fleets, robotic depalletizing systems, conveyors, ASRS and supervisory software. Its differentiators are mot.OS™ orchestration, SYM3™ twins, KPI-led value engineering and global lifecycle services for high availability.



Integration and Engineering Services

HCLTech

HCLTech delivers engineering-first Physical AI via Vision X, Kinetic AI and SmartTwin (built on NVIDIA Omniverse), integrating NVIDIA and Google ecosystems with KPI-backed RaaS models (uptime, MTTR). Simulation-first validation and industry-specific use cases are accelerating its revenue growth.

Hitachi Digital Services

Hitachi Digital Services delivers Physical AI with a three-tier compute architecture (DGX, Omniverse and IGX), edge-first domain solutions in rail and energy, and Lumada-managed services that convert customer zero IP into scalable, SLA-backed operations across regulated industries.

Honeywell Robotics

Honeywell Robotics is a software-first integrator that combines Momentum WES, MC4 and HURC with Digital Prime™ simulation and Forge-based IT-OT convergence, supported by A3certified services, to orchestrate mixed

fleets and engineered MHE for resilient, highthroughput distribution centers. certified services throughput.



Infosys is a leader in end-to-end robotics engineering with simulation-first delivery, vendor-agnostic orchestration, integrated Cobalt™ and Topaz™ platforms, and mature fixed-price commercial models.

KNAPP

KNAPP delivers end-to-end warehouse robotics and automation, combining shuttles, AMRs, AI-enabled picking, vision-based quality systems and the KiSoft software suite, to enable zero-touch fulfillment with digital twin-driven planning, global commissioning and lifecycle support for intralogistics operations.

SSI SCHÄFER

SSI SCHÄFER is a global intralogistics integrator delivering robotics-enabled warehouse systems through modular engineering, mobile robotics and WAMAS®

software. Strengths include simulation-driven integration, AMR orchestration and lifecycle optimization for high-throughput logistics environments.

Swisslog

Swisslog is a warehouse-automation specialist delivering end-to-end goods-to-person and mobile robotics solutions, anchored by the SynQ™ software stack (WMS/WES/MFS/WCS) and IntraMove fleet management, supported by Emulate3D™ digital twins and a global 24/7 service.

Symbotic

Symbotic delivers a vertically integrated, AI-powered warehouse automation platform combining SymBot mobile robots, high-density storage and proprietary orchestration software. The platform integrates with customers' WMS/ERP and includes lifecycle optimization services.

LTM

LTM (Rising Star) provides integration and physical AI enablement through digital engineering, IT-OT integration and analytics-led modernization. Strengths include service-augmented robotics programs, brownfield environments and cost-efficient global engineering delivery.





"Hitachi Digital Services moves from customer zero to managed services, building and proving HMAX/ Lumada internally on a physics-based, three-tier compute architecture, then scaling IP-led solutions across rail, energy and industry with SLA-backed operations and agentic workflows."

Yash Jethani

Hitachi Digital Services

Overview

Hitachi Digital Services, headquartered in California, U.S., is a wholly owned subsidiary of Hitachi. It has employees spread across India, Vietnam, the U.S., the U.K., and Portugal. It primarily offers digital consultancy and technology services, covering cloud, data and IoT services. Under One Hitachi, Hitachi deploys NVIDIA AI factory capabilities globally, spanning DGX/B200, Spectrum X, Omniverse™/Cosmos™ and IGX edge infrastructure. It integrates these into OT to IT delivery for robotics/physical AI in regulated industries. With sensing proven across over 2,000 trains and 60 percent of revenue outside Japan, it offers scale and governance with NVIDIA, Microsoft, OpenAI and Google.

Strengths

Three-tier physical AI architecture: HDS standardizes centralized training (NVIDIA DGX™), simulation and synthetic data (Omniverse™/Cosmos™), and edge inference (NVIDIA IGX™) deployed on assets (for example, trains). This approach enables repeatable model-to-motion patterns with real-time safety and reliability.

Edge-first, domain-led delivery: HDS has strong rail and energy credentials and provides predictive maintenance, overhead catenary inspection and autonomous tram pilots using physics-based, non-probabilistic AI.

Lumada and managed services: HDS' customer zero approach builds IP internally and scales it as asset-led managed services.

Outage optimization agents on Microsoft Fabric and long-term fixed contracts (for example, 30-year rail) align incentives to efficiency and uptime.

Energy grid AI leadership: HDS enables bidirectional grid optimization, revenue-optimized outage planning and an SPP/NVIDIA program that reduces interconnection study times by up to 80 percent, with repeatability across RTOs/ regions. Strategic incubation in quantum and space energy signals long-term innovation.

Global AI Factory backbone for physical AI: Partnerships with Supermicro and, from late 2025, OpenAI accelerate the train-simulate-edge lifecycle. These partnerships also help HDS scale reusable HMAX assets with measurable outcomes.

Caution

HDS is heavily aligned with NVIDIA; enterprises should confirm hardware diversification and sovereignty options. Many robotics programs are staged through 2030; hence, enterprises must validate multi-site production KPIs by sector. Application-layer plug-and-play is limited, which necessitates fine-tuning per client.





Managed Services and Robotics as a Service

Managed Services and Robotics as a Service

Who Should Read This Section

This report is valuable for service providers offering **Managed Services and Robotics as a Service** globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief Information Security Officers, security leaders and risk officers

Should use this report to understand how RaaS providers secure distributed robotic fleets through hardened platforms, telemetry protection and auditable remote operations. Insight into identity controls, network segmentation, compliance, and secure update pipelines enables them to safeguard robotics environments while maintaining uptime and operational trust.

Chief Technology Officers, technology leaders and heads of enterprise architecture

Should utilize this report to understand how RaaS providers integrate robotics with enterprise IT/OT systems, cloud platforms and data pipelines. A deeper understanding of interoperability, API maturity, scalability models and lifecycle modernization helps them steer technology strategy, reduce legacy risk and enable resilient, future ready automation ecosystems.

Delivery heads, operations delivery leaders and service delivery directors

Should use this report to evaluate how RaaS providers manage uptime, SLAs, predictive maintenance and continuous optimization across robotic fleets. Insight into monitoring frameworks, remote diagnostics, modular scaling and incident response supports efficient service delivery, reduced disruption and high reliability automation outcomes.

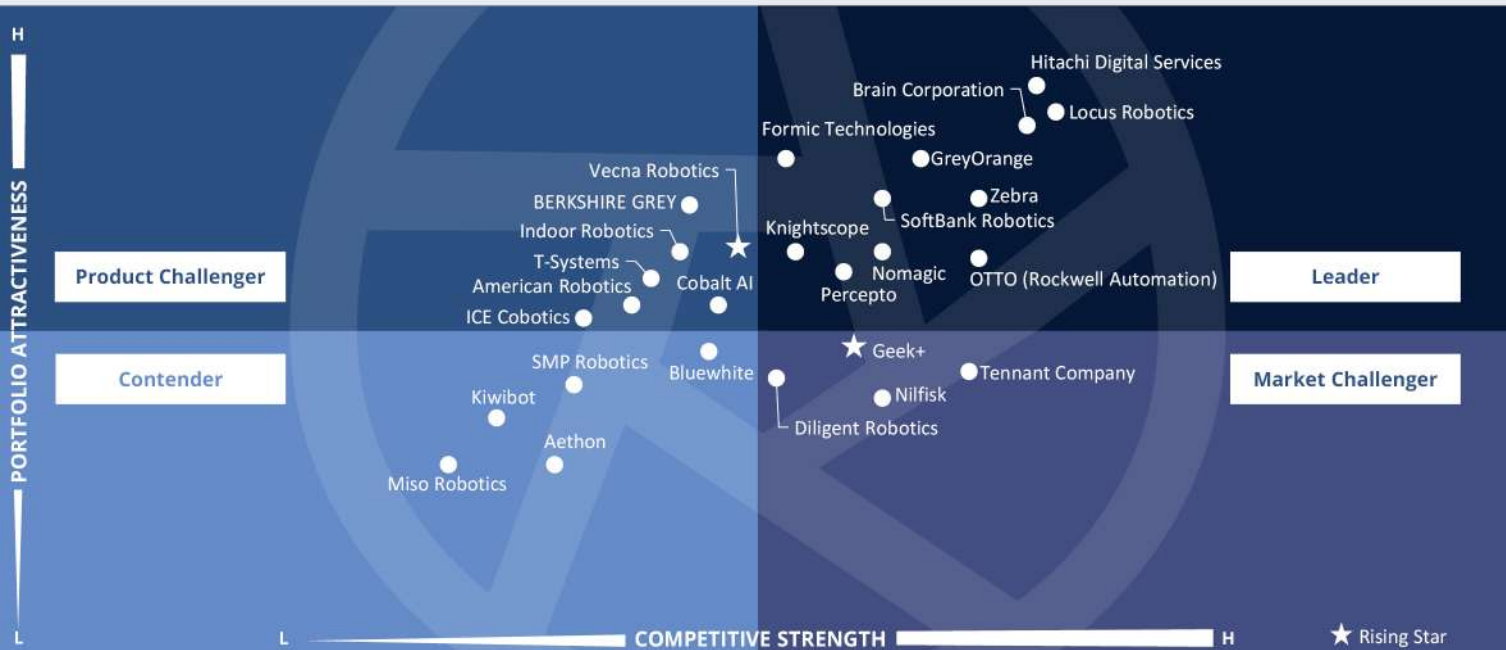
Sourcing, procurement and vendor management professionals, along with Chief Financial Officers

Should utilize this report to assess commercial models, risk sharing frameworks and lifecycle responsibilities of RaaS providers. Insight into pricing structures, outcome based SLAs, utilization analytics and contractual flexibility supports informed partner selection, stronger negotiations and financially resilient robotics investments.



Intelligent Robotics and Physical AI Services Managed Services and Robotics as a Service

Global 2026



This quadrant assesses **robotics managed services** and **RaaS** providers **shifting risk toward outcomes**.

Leading providers combine subscriptions, fleet orchestration and remote operations to deliver **elastic capacity, high uptime and scalable automation**.

Yash Jethani



Managed Services and Robotics as a Service

Definition

This quadrant evaluates managed service providers that operate and optimize robotic systems after deployment, offering robotics as a service (RaaS) through on-demand or subscription models. These providers are responsible for fleet uptime, scalability and continuous optimization, utilizing AI-powered telemetry, remote diagnostics and behavioral logic updates to proactively manage performance. Leading providers offer around-the-clock monitoring, predictive maintenance, lifecycle management and remote software updates. They assume ongoing operational and financial responsibility for deployment, transforming automation into a continuously optimized service layer. Their RaaS offerings combine hardware, software and support within pay-per-use or tiered subscription frameworks, backed by flexible SLAs and outcome-based guarantees. Some also integrate physical AI systems into enterprise IT/OT environments and provide analytics and reporting on robotic utilization.

Eligibility Criteria

1. Provide **subscription or usage-based robotics services** governed by **SLAs**, covering uptime, performance and mean time to resolution (MTTR), with assurances tied to defined business outcomes
2. Deliver **bundled offerings** that combine hardware, software, AI and support, with embedded policy automation and centralized control
3. Take **full operational and financial responsibility** for the deployment, maintenance, monitoring and lifecycle optimization of **robotics fleets**
4. Offer **remote updates, telemetry analytics and behavioral logic management** via secure, auditable platforms
5. Demonstrate ability to **replace or modernize legacy infrastructure** with minimal disruption, meeting compliance and availability standards
6. Operate **hybrid and distributed robotics environments** with modular scalability
7. Maintain a **mature partner ecosystem**, spanning hardware OEMs and connectivity and security providers to **enable seamless integration**
8. Provide **referenceable RaaS use cases** across industry verticals, with reusable service templates and outcome metrics
9. Use **RaaS model for client engagements** that emphasize transparency, flexibility and risk-sharing rather than CapEx-based sales
10. Support **open interfaces and self-service portals** for closed-loop automation, SLA cocreation and sustainability reporting



Managed Services and Robotics as a Service

Observations

Managed Services and Robotics as a Service use outcome-based subscription models that transition CapEx to OpEx and hold providers accountable for system uptime and productivity. An increasing number of players offer elastic capacity, centralized network operations center (NOC)/tele-operations, over-the-air (OTA) autonomy updates and simulation-led fleet right-sizing. Two motions dominate: vertically integrated stacks delivering turnkey outcomes in focused domains and vendor-agnostic orchestrators coordinating multi-OEM fleets. M&A remains targeted — tuck-ins in multi-agent control, teleoperation, safety/HRI and digital twins — while JVs and financing vehicles enable as-a-service rollouts.

Providers couple fleet orchestration with enterprise IT-OT integration, telemetry and predictive maintenance tied to measurable KPIs (units per hour [UPH], tasks per hour, availability and MTTR). Tiered subscriptions and pay-per-use models enable seasonal elasticity and multi-site playbooks. Digital twins validate layouts, stress-test peak loads and size fleets

pre-deployment. Security, privacy-by-design and remote-operations governance are table stakes, with audit logs, role-based access control (RBAC) and rollback-safe updates.

However, proprietary stacks constrain interoperability, as observed by ISG; expanding into open standards (ROS 2/RMF, VDA 5050 and OPC UA) will widen addressability. Evidence of safety and AI governance remains uneven across regions. Commercial terms vary as well; buyers seek transparent ROI/TCO, standardized SLAs and clear uptime liability. To accelerate growth, providers should prioritize cross-domain expansion; unified control across robots, drones and automation; tighter linkage from autonomy to enterprise automation; and SMB-friendly financing and leasing options.

From the 79 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

Brain Corp

Brain Corp provides BrainOS™, a cloud-connected autonomy and fleet operations platform for deploying and managing large commercial AMR fleets for floor care and retail inventory/shelf intelligence. Its recurring, software-led model is optimized for operating robots reliably in public spaces.

Formic Technologies

Formic Technologies is a robotics-as-a-service provider delivering fully managed industrial automation with zero upfront cost. By combining proprietary software platforms, AI-driven orchestration and outcome-based pricing, it enables manufacturers to deploy and scale robotics without owning assets or managing operations.

GreyOrange

GreyOrange is a recognized multi-agent operations (MAO) pioneer and is one of the few platform providers proven to orchestrate thousands of multi-vendor AMRs, making it a leader in warehouse AI control.

Hitachi Digital Services

Hitachi Digital Services delivers robotics and physical AI as managed, outcome-based services for rail, energy and industrial sectors. It leverages Lumada™, NVIDIA-enabled edge AI and deep engineering expertise to operate, optimize and govern autonomous systems at scale.

Knightscope

Knightscope delivers autonomous security robots (ASRs) under a machine-as-a-service model, combining AI-powered patrol robots, centralized command-and-control software (KSOC) and optional human analyst oversight (risk and threat exposure - RTX). It offers fully managed physical security automation for commercial and government environments.



Managed Services and Robotics as a Service

Locus Robotics

Locus Robotics offers subscription-based AMR fleets with advanced analytics for picking, replenishment and transport in retail, e-commerce and 3PL. With over 350 sites and billions of picks, it provides simulation, predictive fleet sizing and real-time orchestration to improve productivity and 6-12-month ROI, along with flexible seasonal scaling.

Nomagic

Nomagic delivers AI-powered robotic picking-as-a-service for e-commerce fulfillment. Its RaaS cells (justPick™, justInduct™ and justPack™) use vision-language-action models for high-variability SKU handling in European logistics markets.

OTTO

OTTO stands out in the managed services and RaaS space for its industrial-grade AMR orchestration embedded within Rockwell's

automation ecosystem. It delivers highly reliable, plant-integrated fleet control for mission-critical intralogistics environments.

Percepto

Percepto is a leader in autonomous industrial inspections at scale and stands out for regulatory beyond visual line of sight (BVLOS) enablement, drone-in-a-box autonomy and AIM orchestration/analytics. It is a strong fit for energy and critical infrastructures.

SoftBank Robotics

SoftBank Robotics, a global robot integrator, delivers subscription-based service robotics for cleaning, delivery and humanoid applications. Through SoftBank Robotics Connect™ and multi-OEM orchestration, it offers measurable productivity gains and scalable fleet management services worldwide.

Zebra

Zebra offers subscription-friendly AMR fleets via the Fetch Cloud Robotics Platform, automating picking, transport and inventory workflows across warehouses and fulfillment centers. Its AMRs combine robot operating system (ROS)-based autonomy with scalable cloud orchestration for rapid deployment, safe operations and end to end material flow optimization.

Geek+

Geek+ (Rising Star) uses a mature RaaS model to deliver AI-driven AMR fleets for pallet handling, sorting and automated forklift operations. Its intelligent warehouse management platform unifies real-time optimization, multi robot orchestration and data driven decisioning across complex distribution environments.

Vecna Robotics

Vecna Robotics (Rising Star) offers advanced AMR fleets powered by its Pivotal™ orchestration suite, optimizing autonomous material handling, hybrid fulfillment and workflow automation. Its RaaS model combines autonomous software, behavioral logic updates and round the clock operational support to ensure uptime and scalable performance.





"Hitachi Digital Services combines physical AI architecture, domain engineering and operator-grade service models at a global scale to offer robotics managed services that emphasize uptime, safety and lifecycle accountability."

Yash Jethani

Hitachi Digital Services

Overview

Hitachi Digital Services, headquartered in California, U.S., is a wholly owned subsidiary of Hitachi. It has employees spread across India, Vietnam, the U.S., the U.K. and Portugal. It primarily offers digital consultancy and technology services, covering cloud, data and IoT services. Under One Hitachi, Hitachi deploys NVIDIA AI factory capabilities globally, spanning DGX/B200, Spectrum X, Omniverse™/Cosmos™ and IGX edge infrastructure. It integrates these into OT to IT delivery for robotics/physical AI in regulated industries. With sensing proven across over 2,000 trains and 60 percent of revenue outside Japan, it offers scale and governance with NVIDIA, Microsoft, OpenAI and Google.

Strengths

Asset-backed managed services: HDS delivers robotics and physical AI as long-term managed services in the rail, energy and mobility sectors, assuming operational responsibility across deployment, monitoring, upgrades and lifecycle optimization. It aligns performance with uptime, safety and revenue KPIs, differentiating itself from other IT-led RaaS providers.

Unique physical AI architecture: HDS' managed services are anchored in a three-computer architecture: centralized training (DGX), simulation and synthetic data (Omniverse) and edge inference (IGX). This model supports continuous improvement, auditable upgrades and deterministic edge behavior.

IP-led customer zero model: HDS' customer zero approach deploys robotics and AI internally before external rollout, creating pre-validated IP, runbooks and failure patterns that can significantly reduce managed service risks. This model strengthens SLA confidence and attracts customers transitioning to outcome-based robotics operations.

Strong compliance and governance:

Unlike warehouse-centric RaaS providers, HDS excels in throughput, compliance, certification and auditability. Its robotics managed services integrate OT cybersecurity, safety assurance, upgrade governance and regulator-ready reporting, especially in rail, utilities and public infrastructure.

Caution

Hitachi focuses primarily on asset-heavy, regulated sectors; it is less suited for light-asset warehouse RaaS needs. Its commercial terms are often bespoke and lengthy, limiting the appeal for fast-scaling SMBs or seasonal robotics use cases.





Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of February 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 Intelligent Robotics and Physical AI Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies

Lead Author



Yash Jethani
Senior Manager and Principal Analyst

Yash Jethani's professional experience is centered on telecommunications, media and technology (TMT), spanning thought leadership, market and competitive research, consulting, business development, due diligence and account management across corporate marketing, risk, strategy and sales functions.

Prior to his current role, he has built a strong foundation across consulting, research, and marketing — advising on technology strategy and thought leadership at a Big Four firm, delivering custom and syndicated research for telecommunications and IoT clients across Asia-Pacific at a leading global analyst firm, and supporting

corporate and account marketing initiatives focused on next-generation IT delivery in the telecommunications vertical at several IT providers. He currently serves as a lead analyst for ISG's Provider Lens® global research studies across enterprise networking, telecom & media, robotics and physical AI, and cybersecurity.

He brings a cross-functional perspective to the rapidly evolving intersection of technology, industry, and enterprise transformation.

Research Analyst



Arpita Choudhury
Senior Research Analyst

Arpita is a Senior Research Analyst at ISG. She is responsible for supporting and coauthoring Provider Lens® studies on Multi Public Cloud Services, Private Hybrid Cloud Data Center Services and Intelligent Robotics and Physical AI Services. Arpita supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. She also collaborates with the Lead Analysts in the process of rating the providers and in building insights around the market trends and drivers. She has led and supported ad-hoc research requests in investment banking, healthcare, energy, and information and communication technology.

During this period, she has also spent a significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence, and benchmarking. Her areas of interest broadly are - technology, finance and business strategy.



Author and Editor Biographies



Study Sponsor

Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business

strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

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.



Provider Lens®

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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.

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REPORT: INTELLIGENT ROBOTICS AND PHYSICAL AI SERVICES