

# Intelligent Robotics and Physical AI Services

A report comparing provider strengths and differentiators across intelligent robotics and physical AI services



|                             |    |                               |    |
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## Introduction

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.



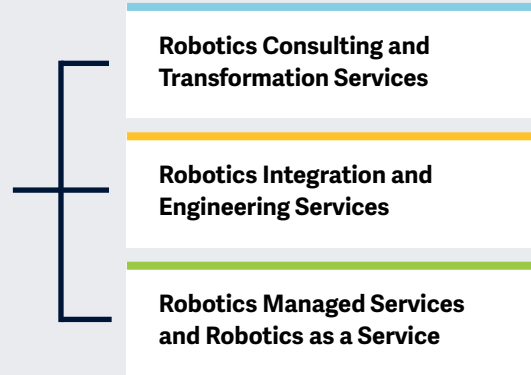
## Intelligent Robotics and Physical AI Services – Coverage Overview

| Anchors & Key Drivers                                                                                                  | 2026 Quadrants                                             | Services                                                                          | Capabilities                                                                                                                   |
|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>Innovation - IP</b> – Industry-specific accelerators, benchmarks, AI Sandboxes, Cloud, etc.                         | <b>Robotics Consulting and Transformation Services</b>     | Robotics strategy and road map consulting                                         | Expertise in robotics visioning and enterprise automation planning                                                             |
| <b>Security &amp; GRC</b> - Frameworks for embedding physical AI and human-robot collaboration                         |                                                            | Use case assessment frameworks                                                    | ROI modelling and business case development tools                                                                              |
| <b>Enterprise Readiness</b> – Aligning robotics strategy with digital transformation goals                             |                                                            | Governance, safety and compliance frameworks                                      | Global safety standards, create governance models for AI-enabled robotics, risk assessment and regulatory compliance expertise |
| <b>Multi-Platform Integration</b> – AMRs, cobots, vision systems, and AI-driven control logic                          | <b>Robotics Integration and Engineering Services</b>       | Organizational change and workforce enablement                                    | Change management methodologies, workforce training programs, communication frameworks                                         |
| <b>Physical AI Enablement</b> - Embedding perception, sensor fusion, and adaptive behaviors into robots                |                                                            | Robotics-specific engineering or integration services                             | PLC programming, robotics control logic, Safety system integration and certification                                           |
| <b>Custom Engineering</b> - Tailored robotics solutions for unique workflows                                           |                                                            | Robotics platform integration and orchestration                                   | Middleware and API development for IT/OT connectivity, orchestration tools for multi-robot coordination                        |
| <b>Telemetry &amp; Remote Management</b> - AI-powered monitoring, predictive maintenance, and behavioral logic updates | <b>Robotics Managed Services and Robotics as a Service</b> | Zero-touch assurance, predictive maintenance, CX optimization                     | AI-driven predictive analytics, remote diagnostics, automated fault resolution, UX/CX dashboards                               |
| <b>Cost Optimization</b> - Shifting from CapEx to OpEx through pay-per-use models                                      |                                                            | Cloud-integrated and hybrid deployment                                            | Deploying robotics systems on cloud and edge, Integration with ERP, MES, WMS and IoT platforms                                 |
| <b>Innovation - IP</b> – Industry-specific accelerators, benchmarks, AI Sandboxes, Cloud, etc.                         |                                                            | Subscription or usage-based robotics services                                     | SLA-driven service delivery frameworks, commercial models for pay-per-use or outcome-based pricing                             |
|                                                                                                                        |                                                            | Policy automation and centralized control                                         | AI-powered orchestration and policy enforcement tools, centralized dashboards for fleet management                             |
|                                                                                                                        |                                                            | Deployment, maintenance, monitoring and lifecycle optimization of robotics fleets | 24/7 monitoring, remote management, predictive maintenance, automated updates, lifecycle analytics                             |
|                                                                                                                        |                                                            | Modernize legacy infrastructure                                                   | Migration strategies, compliance and interoperability frameworks, retrofit solutions for AI and telemetry                      |



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

Simplified Illustration Source: ISG 2025



#### Definition

**The ISG Provider Lens® Intelligent Robotics and Physical AI Services 2026 study offers the following to business and IT decision-makers:**

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

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



### 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 enterprisewide 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





### 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



## Robotics 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





## Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following three quadrants on Intelligent Robotics and Physical AI Services 2026.

| Quadrant                                            | Global |
|-----------------------------------------------------|--------|
| Robotics Consulting and Transformation Services     | ✓      |
| Robotics Integration and Engineering Services       | ✓      |
| Robotics Managed Services and Robotics as a Service | ✓      |



The research phase falls in the period between November 2025 and December 2025 during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in March 2026.

| Milestones                  | Beginning    | End          |
|-----------------------------|--------------|--------------|
| Survey Launch               | Nov 6, 2025  |              |
| Survey Phase                | Nov 06, 2025 | Dec 12, 2025 |
| Sneak Preview               | Feb 2026     | Mar 2026     |
| Press Release & Publication | Mar 2026     |              |

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens® 2025 research agenda.

### Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

### Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Intelligent Robotics and Physical AI Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

### Research Production Disclaimer:

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence® — Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence™ program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts are continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

Our vision for the Star of Excellence™ is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily. Please allow up to 24 hours for a reply.

Here is the email address:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



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 November 2025 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.



## Contacts For This Study

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### ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

## ISG Advisors for this study



Bill  
Huber

**Partner, Digital  
Platforms and Solutions**



Ryan  
Hamze

**Director, Manufacturing**





## Invited Companies

**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

|                                           |                         |                       |                     |
|-------------------------------------------|-------------------------|-----------------------|---------------------|
| ABB Robotics                              | Baringa                 | cambridge consultants | Diligent Robotics   |
| Accenture                                 | Bastian Solutions       | Capgemini             | Doosan Robotics     |
| Aethon                                    | Bear Robotics           | Capgemini Engineering | DXC Technology      |
| Agile Robots                              | BearingPoint            | CLOOS                 | Efort Robotics      |
| AGILOX Services                           | Beckhoff Automation     | Cobalt AI             | Epson               |
| AlixPartners                              | BERKSHIRE GREY          | Coco Robotics         | Estun Automation    |
| American Robotics                         | Bluewhite               | Cognizant             | Eviden              |
| Arthur D. Little                          | Booz Allen Hamilton     | COMAU                 | Exotec              |
| ASI (Autonomous Solutions)                | Bosch                   | Covariant             | Exyn Technologies   |
| Aspire Systems                            | Bosch Rexroth           | Daifuku               | EY                  |
| ATS Corporation                           | Boston Consulting Group | Deloitte              | FANUC               |
| Autonomous Mobile Robots (AMR) / Robotnik | Boston Dynamics         | Delta Electronics     | Festo               |
| AutoStore                                 | Brain Corporation       | Dematic               | Formic Technologies |
| Avidbots                                  | Brightpick              | DENSO Robotics        | FORTNA              |
| Bain & Company                            | Cainiao                 | Dexterity             | Fraunhofer IPA      |



## Invited Companies

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fruitcore robotics

Fujitsu

Geek+

Gideon Brothers

Grenzebach

GreyOrange

Hanwha Group

HCLTech

Hexaware

Honeywell Robotics

HYUNDAI

IBM

ICE Cobotics

igus

Indoor Robotics

Infosys

Innok Robotics

inVia Robotics

JAKA Robotics

JR Automation

Kassow Robots

Kawasaki Robotics

KEENON Robotics

Keyence

Kiwibot

KNAPP

Knightscope

Korber

KPMG

KUKA

L.E.K. Consulting

Locus Robotics

LTIMindtree

Lux Research

Magazino

McKinsey & Company

Mecademic

Mech-Mind Robotics

MHP

Miso Robotics

Mitsubishi Electric

Mobile Industrial Robots

Mphasis

Mujin

Nachi Robotics Systems

Neura Robotics

Nilfisk

Nomagic

NTT DATA

Nuro

Ocado Intelligent Automation

Oliver Wyman

Omron Automation

OTC Daihen

OTTO by Rockwell Automation

PA Consulting

Panasonic

Percepto

Phoenix Contact

Plus One Robotics



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|                         |                       |                     |       |
|-------------------------|-----------------------|---------------------|-------|
| Porsche Consulting      | SIASUN                | TGW Logistics       | Zebra |
| Pudu Technology         | SICK                  | Thoughtworks        |       |
| PwC                     | Siemens               | T-Systems           |       |
| Relay Delivery Robotics | Slalom                | TUV Rhineland®      |       |
| Richtech Robotics       | SMP Robotics          | TUV SUD             |       |
| RightHand Robotics      | SoftBank Robotics     | UBTECH Robotics     |       |
| RobotLAB                | Sopra Steria          | Universal Robots    |       |
| Robotnik Automation     | SSI Schaefer          | Vanderlande         |       |
| Rockwell Automation     | Starship Technologies | Vecna Robotics      |       |
| Roland Berger           | Staubli               | voraus robotik      |       |
| RSI Automation          | Swisslog              | west monroe         |       |
| Schneider Electric      | TCS                   | Wipro               |       |
| Serve Robotics          | Tech Mahindra         | WITTMANN Technology |       |
| SEW-EURODRIVE           | TECHMAN ROBOT         | Yamaha              |       |
| Sia Partners            | Tennant Company       | Yaskawa             |       |



### iSG Provider Lens®

The iSG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of iSG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.

iSG advisors use the reports to validate their own market knowledge and make recommendations to iSG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about iSG Provider Lens® research, please visit this [webpage](#).

### iSG Research™

iSG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. iSG Research™ delivers guidance that helps businesses accelerate growth and create more value.

iSG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about iSG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](https://research.isg-one.com).

### iSG

[iSG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, iSG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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

For more information, visit [isg-one.com](https://isg-one.com).





**NOVEMBER, 2025**

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**BROCHURE: INTELLIGENT ROBOTICS AND PHYSICAL AI SERVICES**