ISG Provider Lens™

Automotive and Mobility Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCLTech

QUADRANT REPORT | JULY 2025 | NORTH AMERICA

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New age technologies, changing consumer behavior and sustainability are reshaping the auto industry

The North American automotive industry is undergoing a significant transformation driven by technological advancements, evolving consumer preferences, tariffs, regulatory pressures and new business models. The industry stands at a crossroads of unprecedented change driven by the convergence of technological advancements, regulatory pressures and evolving consumer behaviors. The transition toward eMobility, the rise of software-defined vehicles (SDVs) and the importance of connectivity and sustainability are shaping the industry's future. However, automotive manufacturers must navigate various challenges, including technology integration complexities, cybersecurity threats and compliance with stringent regulations to remain competitive in this evolving landscape.

To thrive in this environment, stakeholders must foster innovation through strategic collaborations, invest in advanced technologies and remain attuned to shifting consumer expectations. By proactively addressing these trends, drivers and challenges, the automotive industry can pave the way for a sustainable and connected future that benefits manufacturers, consumer and society.

Key trends and drivers shaping the global automotive landscape include:

Continued emphasis on CASE technologies: The automotive industry is focused on the development of CASE technologies — connected, autonomous, shared and electrified mobility solutions. Although the adoption of these innovations is not progressing as quickly as anticipated, they remain integral to the industry's future. As automakers invest heavily in R&D, the potential for revenue generation through these technologies represents a significant opportunity despite the slower-than-expected uptake. Waymo has pioneered autonomous driving technologies, partnering with various stakeholders to develop autonomous ride-hailing services.

The auto industry's **rapidly evolving landscape calls for** innovation among all stakeholders

Tariffs reshaping the industry in the near term: The reintroduction of 25 percent tariffs on imported vehicles and parts in April 2025 is expected to have a near-term effect on the North American industry. Automakers such as GM, Ford, and Stellantis face projected losses of up to $108 billion due to increased production costs. Foreign automakers, such as Audi, are considering establishing U.S. manufacturing facilities to circumvent tariffs.

Ecosystem shift toward eMobility and mobility services: The automotive industry is witnessing a paradigm shift toward electric mobility (eMobility) and mobility services. Consumers are increasingly inclined toward sustainable transportation options, resulting in a surge in electric vehicle (EV) adoption and alternative mobility services such as ride-sharing and vehicle subscriptions. The transition to eMobility is reshaping traditional car ownership models, prompting the creation of mobility-as-a-service (MaaS) platforms that offer seamless and flexible mobility solutions. They allow users to select shared transportation, reducing the number of vehicles on the road.

Rise of SDVs: The shift toward SDVs is one of the most transformative trends in the automotive industry. With the integration of advanced computing platforms, vehicles are becoming more software-centric, allowing continuous upgrades, personalized features and enhanced connectivity. This transformation enables car manufacturers to reimagine their business models, focusing on subscription-based services and over-the-air (OTA) software updates that enhance user experiences post-purchase. For example, Tesla leads in using software updates to improve vehicle performance and add features such as enhanced autopilot functionalities and OTA upgrades.

Emergence of ecosystem collaborations: The complexity of the modern automotive landscape has necessitated collaborations among various ecosystem stakeholders. Partnerships between OEMs, technology firms, charging infrastructure providers and mobility service companies are becoming common. These collaborations aim to streamline operations, enhance service offerings and address consumers' evolving needs. For example, to mitigate tariff risks, Mitsubishi and Nissan are considering a joint US production plant. OEMs are increasingly aligning with tech companies to leverage their expertise in data analytics, AI and connectivity.

Growth of robo taxi services: The proliferation of robo taxis signifies a major shift in transportation. As this technology matures, robo taxi services are expected to become more affordable and widely available. This trend threatens traditional vehicle ownership models and compels automotive companies to integrate self-driving technologies into their product lines. The rise of autonomous vehicles will alter consumer behavior and reshape urban mobility frameworks, leading to changes in infrastructure and regulatory requirements. However, OEMs and operators such as Tesla and Waymo face regulatory scrutiny in response to their robotaxi services, especially around safety, as prescribed by the National Highway Traffic Safety Administration (NHTSA).

Sustainability in the mix: Sustainability is a common thread across all initiatives as businesses aim to reduce carbon footprints through innovative practices such as closed-loop battery manufacturing and second-life battery repurposing. By embracing comprehensive strategies encompassing technology, collaboration and sustainability, organizations are well positioned to lead the EV revolution and transition to a future with connected and sustainable mobility. Awareness of environmental issues has led to increased demand for eco-friendly vehicles, compelling manufacturers to focus on EVs and sustainable production practices. The expectation for seamless connectivity in vehicles is driving the integration of advanced technologies, allowing drivers to access services such as navigation, entertainment and maintenance updates.

Advancements in battery technology: Innovations in battery technology are at the forefront of the automotive industry's transition to electric mobility. Enhanced battery performance, reduced costs and improved charging infrastructure are critical to driving EV adoption. As manufacturers invest in R&D to create more efficient energy storage solutions, consumers are increasingly attracted to EVs because of their longer ranges and reduced

charging times. However, the rollback of federal EV tax credits and mandates has dampened consumer incentives, which is forcing manufacturers to recalibrate production plans in response to these challenges.

Regulatory pressure and compliance: The automotive industry faces mounting regulatory pressure aimed at reducing emissions and enhancing safety standards. Thus, automakers are advocating for regulatory updates. The evolving regulatory environment compels North American automakers to invest in new technologies, reengineer their production processes and ensure compliance with industry standards, thereby accelerating the pace of innovation. Compliance with evolving regulations presents a formidable challenge for automotive manufacturers. The transition toward EVs and sustainable practices necessitates substantial investments in research, workforce training and process adjustments to meet regulatory standards. Stringent emissions regulations, —such as those set by the U.S. Environmental Protection Agency (EPA) and the California Air Resources Board (CARB), —compel automakers to invest in EV technology to comply with lower emissions targets. CARB's Advanced Clean Cars II rule, for instance, mandates that all new cars and light trucks sold in California by 2035 must be zero-emission vehicles, with limited allowances for plug-in hybrids.

Complexities in technology integration: As the automotive industry adopts a range of new technologies, the coexistence of legacy systems and new platforms creates integration challenges. Automakers must navigate the complexities of software and hardware compatibility, operational efficiency and high operational costs. The need to reduce technical debt while managing multiple generations of technology poses risks that necessitate careful planning and execution.

Cybersecurity threats: With the rise of connected vehicles comes increased vulnerability to cyberthreats. The automotive industry faces significant challenges in ensuring the safety and security of vehicles and their data. Cybersecurity must be a priority throughout the vehicle lifecycle, necessitating robust governance practices, continuous monitoring and proactive risk management to fend off potential attacks.

Changing demographics and consumer preferences: The automotive market is experiencing demographic shifts, with younger consumers showing distinct preferences compared with previous generations. This shift includes a move away from traditional car ownership models. With rising urbanization, consumers prioritize access over ownership, prompting automakers to adapt their product offerings and services to cater to these evolving preferences. North American consumers increasingly prefer larger vehicles, such as SUVs and trucks, driven by demand for versatility, comfort, and perceived safety. This trend persists despite fluctuating fuel prices and influences automaker product lineups and pricing strategies.

The transformation in the automotive industry necessitates adaptation and innovation among automakers to respond to trends such as the shift toward eMobility, the rise of SDVs and increased collaboration among ecosystem players. Their challenges include complexities in technology integration, cybersecurity threats and shifting demographics favoring access over ownership.

Provider Positioning

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	Automotive Engineering and Manufacturing Services	Electric Vehicles and Mobility Services	Autonomous Systems and Software-defined Vehicles	Automotive Retail and Aftermarket Services	Technology Transformation and Consulting
Accenture	Leader	Leader	Leader	Leader	Leader
Akkodis	Leader	Leader	Product Challenger	Market Challenger	Product Challenger
Aptiv	Not In	Product Challenger	Leader	Not In	Not In
Birlasoft	Market Challenger	Not In	Not In	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Leader
CI&T	Not In	Contender	Not In	Rising Star ★	Product Challenger
Cognizant	Leader	Product Challenger	Leader	Leader	Leader
Cyient	Product Challenger	Product Challenger	Rising Star ★	Not In	Product Challenger
Deloitte	Not In	Leader	Not In	Leader	Leader
DXC Technology	Product Challenger	Market Challenger	Product Challenger	Market Challenger	Rising Star ★

Provider Positioning

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	Automotive Engineering and Manufacturing Services	Electric Vehicles and Mobility Services	Autonomous Systems and Software-defined Vehicles	Automotive Retail and Aftermarket Services	Technology Transformation and Consulting
eInfochips	Rising Star ★	Product Challenger	Contender	Not In	Not In
EY	Not In	Leader	Not In	Product Challenger	Leader
FPT Software	Product Challenger	Not In	Not In	Not In	Not In
Genpact	Product Challenger	Product Challenger	Not In	Leader	Product Challenger
Harman AES	Market Challenger	Market Challenger	Product Challenger	Not In	Market Challenger
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Not In	Not In	Not In	Product Challenger
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Market Challenger	Rising Star ★
IBM	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader

Provider Positioning

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	Automotive Engineering and Manufacturing Services	Electric Vehicles and Mobility Services	Autonomous Systems and Software-defined Vehicles	Automotive Retail and Aftermarket Services	Technology Transformation and Consulting
ITC Infotech	Contender	Not In	Contender	Contender	Market Challenger
KPIT	Leader	Leader	Leader	Not In	Not In
Kyndryl	Market Challenger	Not In	Not In	Market Challenger	Leader
LTIMindtree	Contender	Market Challenger	Not In	Market Challenger	Leader
LTTS	Leader	Leader	Leader	Not In	Market Challenger
Nagarro	Contender	Product Challenger	Contender	Product Challenger	Product Challenger
Ness Digital Engineering	Not In	Contender	Not In	Not In	Contender
NTT DATA	Leader	Leader	Product Challenger	Product Challenger	Leader
Perficient	Not In	Market Challenger	Market Challenger	Product Challenger	Product Challenger
Quest Global	Product Challenger	Market Challenger	Leader	Not In	Contender

Provider Positioning

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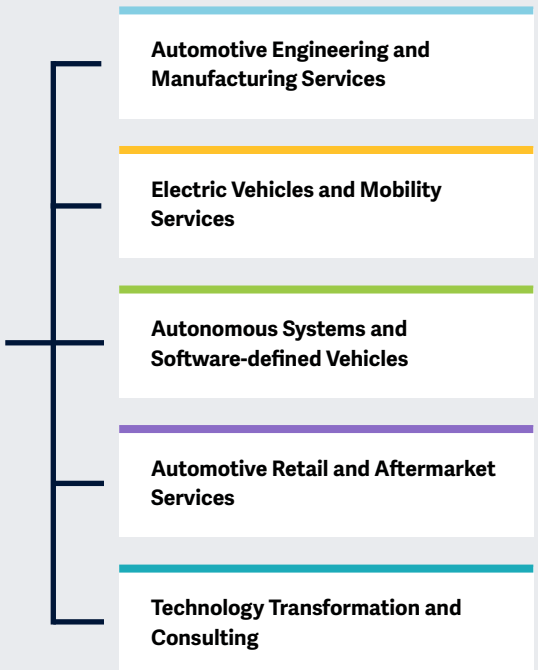
	Automotive Engineering and Manufacturing Services	Electric Vehicles and Mobility Services	Autonomous Systems and Software-defined Vehicles	Automotive Retail and Aftermarket Services	Technology Transformation and Consulting
Randstad Digital	Market Challenger	Not In	Market Challenger	Not In	Not In
Sasken Technologies	Contender	Contender	Contender	Contender	Contender
Softserve	Product Challenger	Not In	Not In	Contender	Market Challenger
Softtek	Not In	Not In	Not In	Not In	Leader
Tata Elxsi	Leader	Rising Star ★	Product Challenger	Not In	Contender
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Leader	Leader
UST	Product Challenger	Contender	Product Challenger	Contender	Product Challenger
VVDN Technologies	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader

Key focus areas for **automotive and mobility services and solutions 2025**

Simplified Illustration, Source: ISG 2025



Definition

Automotive is a pivotal industry that encompasses the design, development, manufacturing, marketing and selling of motor vehicles. It has undergone significant transformations over the years, driven by technological advancements and changing consumer demands. As the industry evolves, automotive services and solutions have become increasingly important in addressing challenges such as product complexity, regulatory compliance and the shift toward electric and autonomous vehicles. Companies are now required to integrate software and digital technologies into their operations to remain competitive, necessitating the adoption of comprehensive solutions that streamline processes and enhance product development.

The importance of automotive industry services lies in their ability to facilitate digital transformation and innovation. As manufacturers transition from traditional internal combustion engines to electric vehicles (EVs), they must adopt agile methodologies and flexible IT architectures. This shift helps reduce costs and improves efficiency and responsiveness to market changes. Services such as product lifecycle management, industrial IoT and advanced data analytics play a crucial role in optimizing operations, ensuring safety and enhancing CX. By leveraging these solutions, automotive companies can drive growth, maximize asset utilization and deliver next-generation vehicles that meet evolving consumer expectations.

The study aims to understand the need for and importance of automotive services and solutions while understanding providers' capabilities in this rapidly evolving space.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/solutions: Automotive Engineering and Manufacturing Services, Electric Vehicles and Mobility Services, Autonomous Systems and Software-defined Vehicles, Automotive Retail and Aftermarket Services and Technology Transformation and Consulting.

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

- Transparency on the strengths and weaknesses of relevant IT service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional 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.

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.

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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

Automotive Engineering and Manufacturing Services

Who Should Read This Section

This report is valuable for service providers offering automotive engineering and manufacturing services in North America to understand their market position and 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.

Automotive engineering professionals

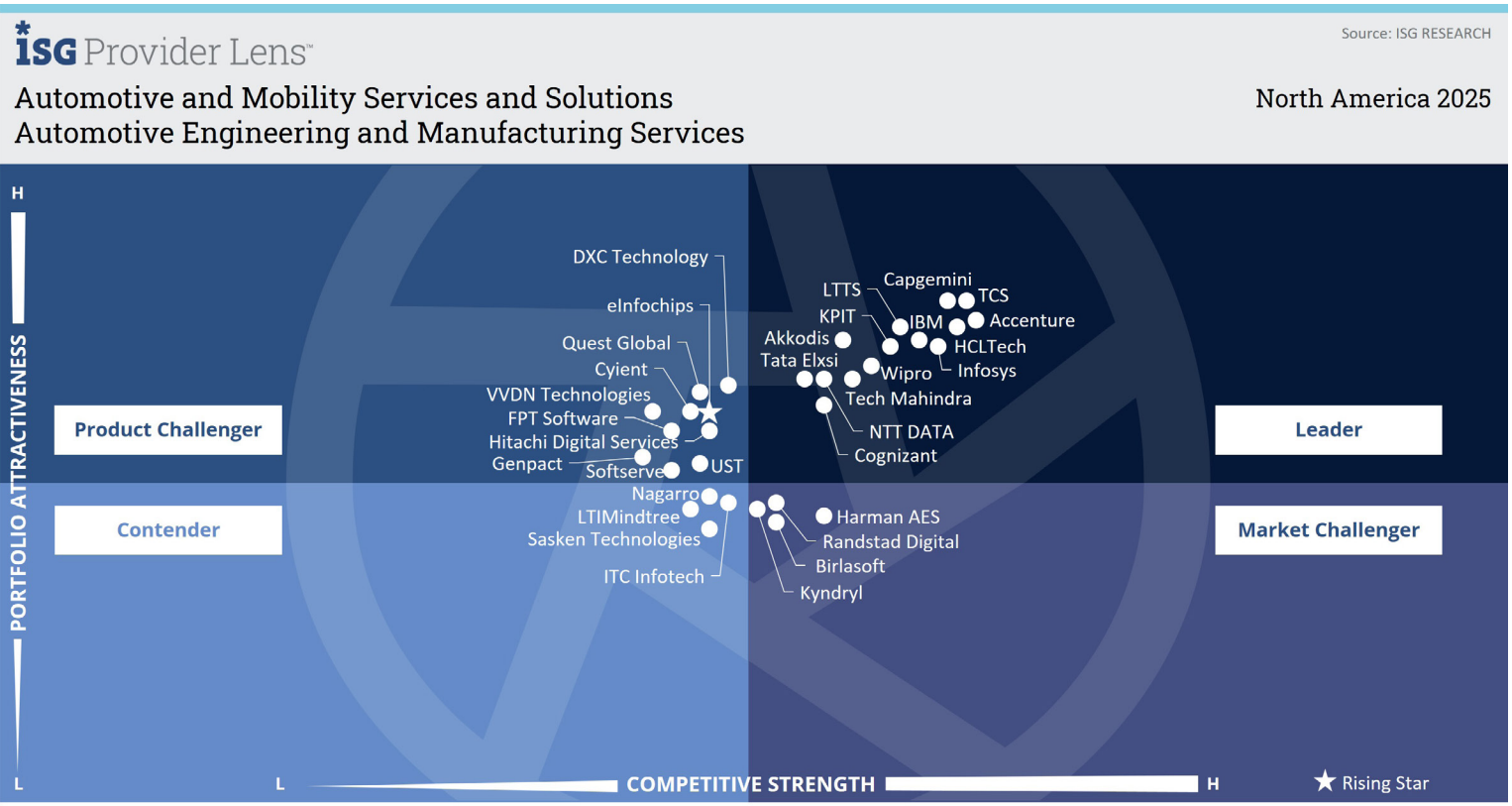
should read this report to navigate the automotive and mobility landscape, understand current industry trends and align their product development roadmaps accordingly.

Technology leaders

should read this report to assess the impact of technologies such as AI and automation in digital factories and make strategic investment decisions.

Operations leaders

should read this report to implement operational agility to efficiently produce and distribute manufactured products to the market.



The quadrant assesses providers focused on the automotive industry that help OEMs and suppliers **drive the creation of** solutions that leverage technology and new materials to **enhance performance, security and operational efficiency.**

Swadhin Pradhan

Definition

Automotive engineering is central to the automotive industry, encompassing the design, development, manufacturing and testing of vehicles and their components. This field integrates various engineering disciplines, including mechanical, electrical and software engineering, to create efficient and safe vehicles. The focus on innovation within automotive engineering has led to advancements in fuel efficiency, safety features and the incorporation of intelligent systems in vehicles. As the industry evolves, there is an increasing emphasis on sustainable practices and EV technology, which are crucial for addressing environmental concerns.

The manufacturing aspect of the automotive industry is equally important. It involves the assembly of vehicles and the optimization of production processes to enhance efficiency and reduce costs. The interplay between automotive engineering and manufacturing is vital for maintaining competitiveness in a rapidly changing market.

Eligibility Criteria

1. Experience in **offering engineering and manufacturing services** to clients in the automotive industry within the country or region (as per the scope of the study)
2. **Successful automotive engineering and manufacturing services**-related engagements (past and present) with at least three automotive companies.
3. **Offerings and services in at least three** of the following areas related to automotive engineering and manufacturing services:
   - Design and development
   - Testing and validation
   - Research and innovation
   - Production engineering
   - Robotics and automation
   - Quality control
   - Safety engineering
   - Environmental considerations
   - Integration of intelligent systems
   - Supply chain management
4. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in the automotive industry
5. **Referenceable automotive industry use cases** for various services and solutions across the value chain

Observations

The automotive industry landscape is marked by significant advancements in engineering, manufacturing and digital transformation, driven by a keen focus on electric and autonomous vehicles. Companies are investing in comprehensive service offerings that encompass the entire automotive lifecycle, from design and prototyping to manufacturing and post-production support. This end-to-end capability allows for streamlined operations and reduced time to market, essential in an increasingly competitive environment.

A strong emphasis is placed on advanced technologies, such as AI, IoT and big data analytics, to enhance vehicle connectivity, automate processes and improve overall CX. The integration of digital solutions and automation tools is vital for optimizing manufacturing processes, ensuring operational efficiency and maintaining high-quality standards.

Collaboration with leading technology providers, automotive manufacturers and suppliers is crucial. Strategic partnerships significantly enhance service delivery, enabling the development of innovative solutions that meet the market's specific needs. These alliances often focus on emerging technologies, such as SDVs, to accelerate the industry's digital transformation. A strong regional presence coupled with global resources allows organizations to effectively address local market demands while maintaining comprehensive support systems.

The industry's commitment to innovation, quality and collaboration, alongside a robust focus on advanced technologies, has positioned it for sustained growth and transformation in the coming years.

From the 100 companies assessed for this study, 32 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture's Industry X division is strategically positioned at the intersection of digital transformation and innovation management in the automotive industry. It leverages cutting-edge technologies and focuses on enhancing product design and manufacturing processes.

AKKODiS

Akkodis drives collaborative innovation in electric vehicles and autonomous systems to enable advanced technologies, including automated processes and sustainable practices, with the help of a robust partner ecosystem and commitment to R&D.

Capgemini

Capgemini is a global leader in the automotive industry, leveraging over 30 years of expertise in digital engineering to provide tailored solutions that converge software, hardware and data for OEMs and suppliers.

cognizant

Cognizant delivers comprehensive end-to-end services by complying with North American regulations and focusing on smart manufacturing that leverages advanced analytics, IoT and AI to improve operational efficiency.

HCLTech

HCLTech provides comprehensive end-to-end engineering solutions for the automotive industry, covering all aspects from initial design to production support, positioning it as a preferred partner for North American manufacturers.

IBM

IBM excels in hybrid cloud solutions, enhancing infrastructure modernization and software deployment and leveraging AI for increased engineering productivity and improved CX in the automotive engineering and manufacturing space.

Infosys, through strategic acquisitions such as in-tech and InSemi, has expanded its consulting and R&D capabilities, focusing on cutting-edge technologies such as EVs and autonomous systems.

KPIT

KPIT has an experienced workforce of automotive experts who understand industry trends and regulations. This expertise is bolstered by the acquisition of FMS Future Mobility Solutions, a company specializing in autonomous driving and vehicle safety.

LTTS

LTTS' diverse partner ecosystem includes leading firms such as NVIDIA, BlackBerry/QNX, Intel and Qualcomm, facilitating the development of cutting-edge engineering solutions in areas such as AI, IoT and SDVs.

NTT DATA has adopted a consulting and technology approach, offering AI use cases for automotive development and generative AI (GenAI) tools to streamline engineering requirements and code development through Microsoft Azure and OpenAI models.

Tata Elxsi

Tata Elxsi offers a comprehensive range of services throughout the automotive lifecycle, from design and prototyping to manufacturing and acts as a one-stop-shop for clients, streamlining operations and reducing time to market.

TCS demonstrates comprehensive expertise across various automotive segments, including electric vehicles, traditional manufacturing and ADAS, using its Future Ready Manufacturing framework to enhance intelligence, resilience and adaptability.

Tech Mahindra excels in integrating advanced technologies such as IoT, AI and big data analytics into manufacturing, enhancing vehicle connectivity, automating maintenance and improving CX.

Wipro offers end-to-end manufacturing services, from design to production and quality control, ensuring fully integrated solutions that streamline operations and reduce lead times, utilizing advanced technologies such as automation and robotics to enhance efficiency.

eInfochips (Rising Star)

eInfochips' (Rising Star) offerings are driven by innovation and focus on cutting-edge solutions that leverage AI and ML and IoT technologies to develop smart automotive applications that enhance performance and UX and enable predictive maintenance.

Leader

"HCLTech's key focus areas, such as vehicle architecture, safety and security, AI and ML adoption, simulation, and virtual validation, are complemented by its comprehensive offerings in consulting, product development, vehicle engineering and digital solutions."

Swadhin Pradhan

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 223,400 employees across over 220 delivery centers worldwide. In FY25, the company generated $13.8 billion in revenue, with IT and Business Services as its largest segment. HCLTech, with its deep engineering heritage and capabilities, provides end-to-end product design and development solutions. The company has invested in Autotech, a dedicated business unit, to drive autonomous, connected, electric and shared (ACES) business growth using its state-of-the-art lab infrastructure, innovative intellectual property and a strong talent pool to deliver client value.

Strengths

Advanced prototyping capabilities: In North America, HCLTech stands out with its cutting-edge prototyping capabilities. These services leverage advanced technologies such as 3D printing and virtual simulations, enabling automotive companies to rapidly iterate designs and reduce time to market for new vehicles. With extensive expertise in safety engineering, the company ensures all engineering processes meet stringent safety standards.

Robust robotics and automation expertise: HCLTech has established a strong foothold in robotics and automation that are essential for modern automotive manufacturing. Its solutions help streamline production processes, improve labor efficiency and ensure high-quality outputs. By integrating these advanced technologies, HCLTech assists automotive clients in achieving operational excellence while navigating challenges such as labor shortages and increasing production demands.

End-to-end engineering solutions: HCLTech offers comprehensive end-to-end engineering and technology solutions tailored for the automotive industry. This includes initial design to production support. By providing a full spectrum of services, HCLTech positions itself as a partner of choice for North American automotive manufacturers, effectively addressing diverse client needs and enhancing operational efficiencies.

Caution

With its extensive capabilities in embedded design services, HCLTech can benefit from the resurgence of the semiconductor industry and its integration into the automotive industry in North America. It can further expand its client portfolio that continues to be dominated by large enterprises.

Electric Vehicles and Mobility Services

Who Should Read This Section

This report is valuable for service providers offering electric vehicles and mobility services (EMS) in North America 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.

Technology leaders

should read this report to understand the trends and opportunities in sustainability technology, focusing on batteries, infrastructure and user offerings.

Digital leaders

should read this report to identify areas where technology and services can provide data-driven solutions for advancements in batteries, grid management and smart infrastructure.

Sustainability leaders

should read this report to advocate the adoption of clean technologies and collaborate with EMS providers to promote environment-friendly practices throughout the eMobility sector.

The quadrant assesses service providers focused on **electric mobility services,** offering a wide range of solutions and businesses focused on facilitating the use of EVs, charging infrastructure, battery management and related infrastructure.

Swadhin Pradhan

Definition

The automotive industry is undergoing a significant transformation driven by the rise of electric vehicles and mobility services, which are essential for addressing environmental concerns and enhancing sustainability. As the transport sector is one of the largest contributors to greenhouse gas emissions, the shift toward EVs is crucial for decarbonizing this sector. The electrification of vehicles reduces reliance on fossil fuels and mitigates air pollution, thereby improving public health. The transition to electric mobility is not merely a technological shift; it represents a fundamental change in how society approaches transportation, moving toward more sustainable practices.

Integrating various new mobility services into urban planning and public transportation systems can enhance travel efficiency and convenience. Governments can accelerate this transition by investing in charging infrastructure and offering incentives for EV purchases, ultimately leading to a more sustainable future.

Eligibility Criteria

1. Experience in **offering electric vehicle and mobility services** to clients in the automotive industry within the country or region (as per the scope of the study)
2. **Successful electric mobility services-related engagements** (past and present) with at least three automotive companies
3. **Offerings and services in at least three** of the following areas related to electric mobility services:
   - Charging infrastructure
   - Smart charging solutions
   - Connected services
   - Battery technology
   - Renewable energy adoption
   - New business models
   - Electric mobility supply chain
   - Electricity grid
   - Information, communication and monitoring
4. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in the automotive industry
5. **Referenceable automotive use cases** for various services and solutions across the value chain

Observations

The landscape of EVs and mobility services is rapidly evolving, driven by technological advancements and the growing demand for sustainable transportation solutions. Organizations in this sector use innovative technologies, robust partnerships and regulatory support to remain competitive.

A strong focus on R&D is critical for delivering cutting-edge solutions in areas such as autonomous driving, charging infrastructure and electric mobility systems. Integration of smart technologies within charging solutions enhances UX and optimizes power management, making EVs more appealing to consumers.

Collaboration with leading automotive manufacturers and tech firms is essential for product development and feature enhancements. These alliances enable faster time to market for new technologies and improve overall service offerings. Investment in electrification solutions, especially battery technologies, supports the transition to green mobility.

The regulatory landscape in North America presents lucrative opportunities, with incentives encouraging manufacturers and consumers to adopt EVs. Companies that effectively navigate these evolving regulations can gain a competitive edge by implementing compliant solutions that align with local standards.

There is an emphasis on developing smart mobility solutions that integrate various transportation modes, promoting urban mobility and reducing congestion. The use of data analytics and AI is increasingly common, enabling organizations to gain insights into market dynamics, optimize operations and enhance CX.

From the 100 companies assessed for this study, 32 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture's diversified portfolio of battery lifecycle management solutions, from battery development to recycling, indicates a thorough understanding of market needs and operational lifecycles as the demand for EVs increases.

AKKODiS

Akkodis' extensive capabilities across the battery lifecycle, AI integration and innovative solutions position it as a strong partner for organizations aiming to navigate the future of smart mobility and automotive technology.

Capgemini

Capgemini's strengths in software-driven mobility, strategic support for gigafactories and a strong emphasis on sustainability make it an attractive partner for businesses looking to advance their capabilities in the EV and mobility sector.

Deloitte.

Deloitte's involvement in the transformation of mobility is evident through its focus on electrification, connected vehicles and new transportation models, thus helping clients navigate an increasingly complex landscape.

EY

EY's comprehensive suite of services, tools and capabilities in digital transformation, advisory services for electrification and commitment to fostering industry collaboration make it a potent ally for clients in the automotive industry.

HCLTech

HCLTech has carved a significant niche in the EV ecosystem, focusing on comprehensive charging infrastructure solutions, AI-driven connected services and robust renewable energy solutions.

IBM's extensive IT and digital solutions, combined with its focus on collaboration and product lifecycle management, help companies enhance their operations, drive innovation and navigate the complex landscape of EV and mobility services effectively.

Infosys has strategically positioned itself as a key player in the electric mobility landscape through its strong partnerships, domain expertise in battery technology and collaborative innovation efforts focused on smart mobility.

KPIT

KPIT is focused on building solutions to help automotive OEMs and suppliers develop comprehensive charging infrastructure, enhance expertise in electrification and drive innovative MaaS solutions.

LTTS

LTTS has established itself as a significant player in the EV technology landscape through its advanced R&D capabilities, focus on smart mobility solutions and deep understanding of regulatory compliance.

NTT DATA's dedicated approach to enhancing EV charging infrastructure and managing data underscores its commitment to improving the overall EV UX, making it a key player in the global EV and mobility markets.

TCS' strategic collaborations with automotive leaders facilitate knowledge exchange and resource sharing, allowing it to develop customized solutions that meet local regulatory frameworks and customer expectations.

Tech Mahindra has made significant strides in developing connected mobility solutions, including MaaS and exploring new business models such as shared mobility and multimodal transport solutions and fleet management systems.

Wipro's innovative charging infrastructure solutions, comprehensive smart mobility, electrification offerings and strength in data-driven insights position the company as a pivotal partner in the EV ecosystem.

Tata Elxsi (Rising Star)

Tata Elxsi's (Rising Star) commitment to developing new electrification solutions, such as the Battery Passport solution created in collaboration with MineSpider, demonstrates its dedication to innovation in battery technology and lifecycle management.

Leader

"HCLTech supports customers in ensuring efficient and sustainable operations transitioning to EV fleets."

Swadhin Pradhan

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 223,400 employees across over 220 delivery centers worldwide. In FY25, the company generated $13.8 billion in revenue, with IT and Business Services as its largest segment. In the EV space, it is involved in developing electric powertrain components, including batteries, inverters and onboard chargers with bi-directional charging capabilities that ensure efficient energy storage and usage. The company also offers platforms to monitor and manage charging infrastructure that offer services such as remote start/stop, reservation, TOD metering and availability status.

Strengths

Comprehensive charging infrastructure solutions: HCLTech offers an extensive range of solutions for charging infrastructure, fundamental to supporting the growth of EVs in North America. This includes the development of public and private charging stations and backend systems for monitoring and managing network availability. By leveraging innovative smart charging technologies, HCLTech is at the forefront of developing solutions that optimize charging schedules to reduce costs and enhance energy efficiency.

AI-driven connected services: With the EV Assist platform, HCLTech integrates AI technology for in-vehicle connectivity that enhances UX through personalized services and real-time data analytics. This integration provides drivers with comprehensive navigation solutions and connected services and allows manufacturers to gather valuable insights, leading to continuous improvements in vehicle technology and customer satisfaction.

Robust renewable energy solutions: As part of its commitment to sustainability, HCLTech provides innovative solutions to facilitate renewable energy adoption within the EV sector. This includes energy management systems that integrate renewable energy sources into EV charging solutions, helping consumers transition to greener alternatives.

Caution

HCLTech should integrate and showcase its comprehensive in-house design, development and validation capabilities with the acquisition of ASAP in Germany. This approach can strengthen its position in EV-related verification and validation services.

Autonomous Systems and Software-defined Vehicles

Who Should Read This Section

This report is valuable for service providers offering autonomous systems and software-defined vehicles in North America 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.

Automotive engineering professionals

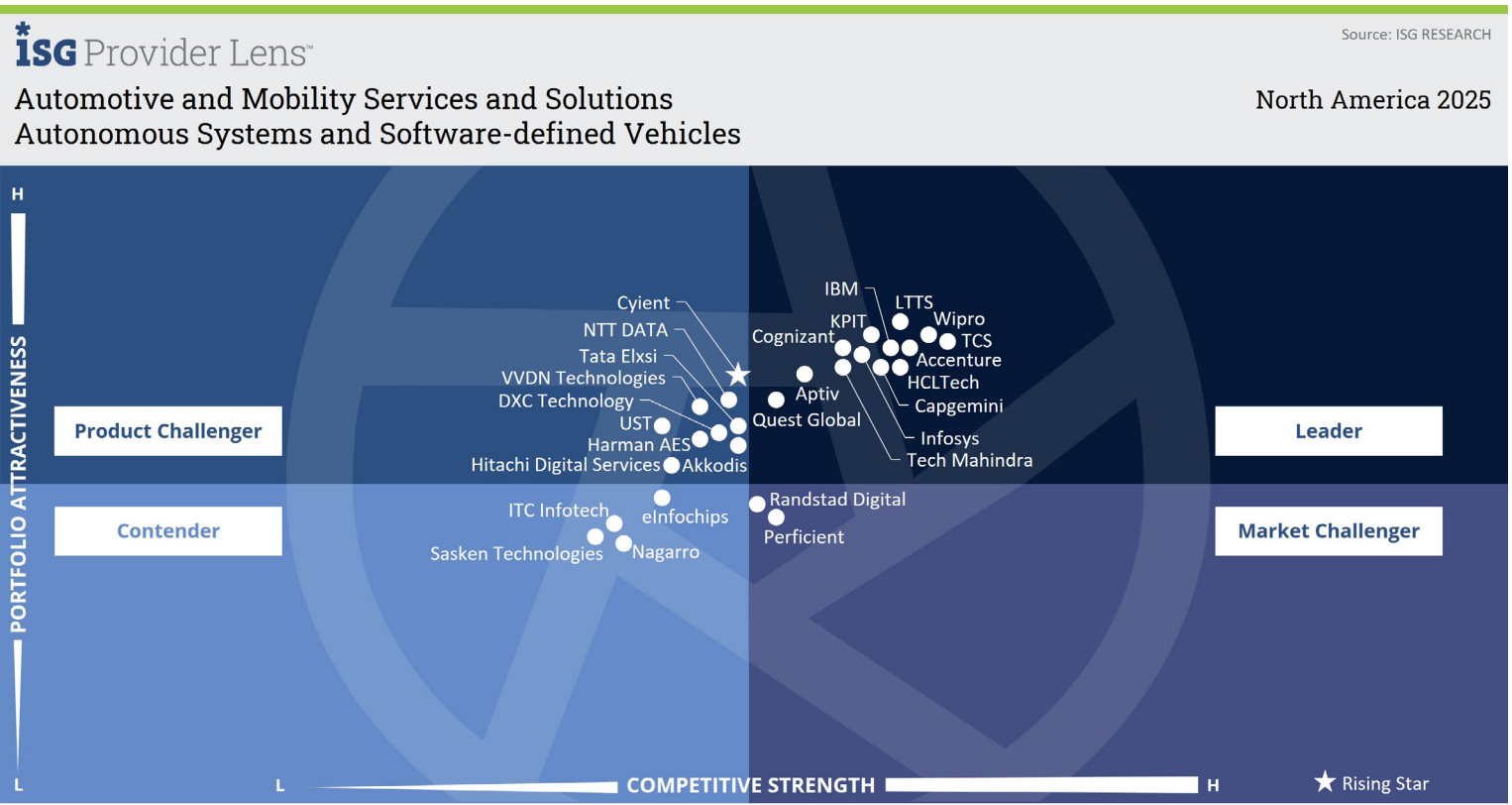
should read this report to navigate the automotive and mobility landscape, understand current industry trends and align their product development roadmaps accordingly.

Technology leaders

should read this report to understand the different technologies required to integrate autonomous driving and understand the software required to enhance self-driving.

Strategy professionals

should read this report to understand the autonomous vehicles market and build roadmaps that support this transition.



The quadrant assesses service providers focused on **developing and advancing autonomous systems,** offering a platform for continuous improvement and adaptation of self-driving capabilities through software updates.

Swadhin Pradhan

Definition

The automotive industry is undergoing a significant transformation driven by the integration of autonomous systems and the rise of software-defined vehicles (SDVs). These advancements reshape vehicles' operation, enhancing safety, efficiency and UX. Autonomous systems leverage AI to enable features such as adaptive cruise control, lane departure warnings and autonomous emergency braking. Integrating AI into vehicles allows for predictive maintenance, which can identify issues before they become serious problems, extending vehicle lifespan and optimizing performance.

SDVs represent a paradigm shift in automotive design and functionality. This shift allows for over-the-air updates, enabling manufacturers to enhance vehicle capabilities post purchase without requiring physical modifications. Continuous software upgrades ensure that vehicles can adapt to new technologies and consumer demands over their lifecycles.

Eligibility Criteria

1. Experience in **offering autonomous system and SDV services** to clients in the automotive industry within the country or region (as per the scope of the study)
2. **Successful autonomous system and SDV services-related** engagements (past and present) with at least three automotive companies
3. **Offerings and services in at least three** of the following areas related to autonomous system and SDV services:
   - Levels of autonomy
   - Definition and functionality
   - Modular software architecture
   - Integration with transportation systems
   - V2X communication
   - Predictive maintenance
   - Personalization
   - Cloud connectivity
   - Security services (cyber and physical)
   - Infotainment systems and services
4. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in SDVs and autonomous system
5. **Referenceable case studies** from key auto industry segments

Observations

The automotive industry is witnessing a transformative shift toward SDVs and ADAS, driven by cutting-edge technology and strategic collaborations. Leading firms are developing innovative solutions that integrate cloud computing, AI and advanced data analytics to enhance vehicle performance and UX. By leveraging flexible and scalable platforms, providers enable OEMs to accelerate vehicle software development and offer customizable digital cockpits.

Many organizations focus on advanced ADAS capabilities such as multisensor fusion, AI-based object detection and real-time decision-making. Their expertise in HD mapping, data annotation and simulation environments ensures effective validation of autonomous features, improving safety and reliability on the road.

Partnerships with technology firms, OEMs and research institutions play a critical role in enhancing service offerings and driving innovation. A strong understanding of regulatory frameworks enables these firms to navigate compliance with safety and performance benchmarks.

The emphasis on modular, reusable components and cloud-native architectures enhances scalability and rapid deployment. This approach ensures auto manufacturers adapt swiftly to market demands while supporting advanced functionalities such as OTA updates and AI-driven personalization.

The automotive landscape is evolving rapidly, characterized by a blend of innovation, strategic partnerships and regulatory expertise that collectively shape the future of mobility, making vehicles safer, smarter and more connected.

From the 100 companies assessed for this study, 28 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture's concentrated efforts in the SDV and autonomous systems segments bolster its competitive edge and align with the broader industry movement toward digitalization and advanced mobility solutions.

Aptiv's

Aptiv's strategic focus on ADAS and SDV technologies, coupled with its robust engineering capabilities and significant industry partnerships, positions it favorably in the automotive technology landscape.

Capgemini

Capgemini's strategic advancements in comprehensive engineering services, expertise in SDVs and application lifecycle management and the development of a robust partner ecosystem position it as a leader in automotive digital transformation.

cognizant

Cognizant's leadership in integrating advanced technologies such as AI and ML into existing automotive frameworks demonstrates its commitment to enhancing the capabilities of autonomous systems.

HCLTech

HCLTech's extensive background in robust digital services offerings and specialization in V2X communication and developing and deploying ADAS systems establish it as a trusted partner for clients aiming to enhance vehicle safety and efficiency.

IBM

IBM's pioneering efforts in developing SDV architectures, advanced engineering lifecycle management and strategic partnerships position it as a leader in the automotive technology space.

Infosys

Infosys' recognition as a full-spectrum solution provider for SDVs signifies its ability to support clients throughout the SDV development lifecycle, from initial conceptualization to final implementation.

KPIT

KPIT's partnerships with leading technology firms and research institutions position the company to leverage the latest advancements in autonomous systems and SDVs and create innovative automotive solutions.

LTTS

LTTS' strong positioning as a provider of robust SDV solutions, coupled with its comprehensive ADAS capabilities and commitment to innovation, underscores its importance in the automotive technology landscape.

Quest Global

Quest Global's focus on facilitating the shift from hardware-centric vehicles to SDVs enables the company to develop and implement solutions that enhance vehicle functionality through advanced software integration.

TCS TATA CONSULTANCY SERVICES

TCS' emphasis on modular software architecture reflects its understanding of the rapidly evolving automotive landscape, especially around SDVs and autonomous systems, where flexibility and adaptability are essential.

TECH mahindra

Tech Mahindra's strategic partnerships with technology innovators, automotive OEMs and research institutions significantly enhance its ADAS and SDV offerings.

wipro

Wipro's role as a founding partner of SDVerse, its focus on innovative cloud-native solutions and its strategic collaborations with industry stakeholders underscore its commitment to leading advancements in the automotive industry.

CYIENT

Cyient's (Rising Star) scalable SDV solutions, robust ADAS capabilities and emphasis on innovations and partner ecosystem position the company as a significant player in the automotive technology landscape.

Leader

"HCLTech's ability to integrate its strengths around engineering, cybersecurity and semiconductors across the automotive supply chain and SDV technologies makes its offerings robust, laying a solid groundwork for trust and reliability in autonomous systems."

Swadhin Pradhan

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 223,400 employees across over 220 delivery centers worldwide. In FY25, the company generated $13.8 billion in revenue, with IT and Business Services as its largest segment. HCLTech's capabilities in ADAS, autonomous driving and SDV encompass a wide range of hardware and software development aspects. This includes hardware architecture, board design, VLSI/FPGA, reliability, V2V and V2X integration, fog and rain detection and PCB design. On the software side, the company has expertise in BSP development, image algorithm development and compliance with industry standards such as AUTOSAR and ISO 26262.

Strengths

Robust cloud and digital services offerings: HCLTech's SDV capabilities cover various aspects such as cloud and edge platforms, software platforms and shared service layers. These solutions facilitate scalable infrastructure that can adapt to the dynamic nature of autonomous technologies. It also partners with key industry players around silicon and platform development, embedded software, automotive testing, cybersecurity and DevOps.

V2X communication expertise: With the growing necessity for vehicles to communicate with each other and their surrounding infrastructure, HCLTech stands out with its expertise in communication technologies. This advantage is vital for maximizing road safety and traffic efficiency while laying the groundwork for full vehicle autonomy. HCLTech's innovative solutions in vehicle-to-everything (V2X) enable improved coordination between vehicles and smart city infrastructures.

Extensive expertise in ADAS: HCLTech has over three decades of expertise in the development and deployment of ADAS systems. This experience positions HCLTech as a strategic partner for clients seeking expertise in creating safer and more efficient driving experiences. The company's understanding of regulatory frameworks and market trends provides tailored solutions for diverse client needs.

Caution

HCLTech should leverage its manufacturing engineering capabilities and technology (AI and ML and cloud) and communication expertise to integrate digital twins and V2V and vehicle-to-infrastructure (V2I) communications to help clients develop next-generation vehicle models.

Automotive Retail and Aftermarket Services

Who Should Read This Section

This report is valuable for service providers offering automotive retail and aftermarket services in North America 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.

Marketing and sales leaders

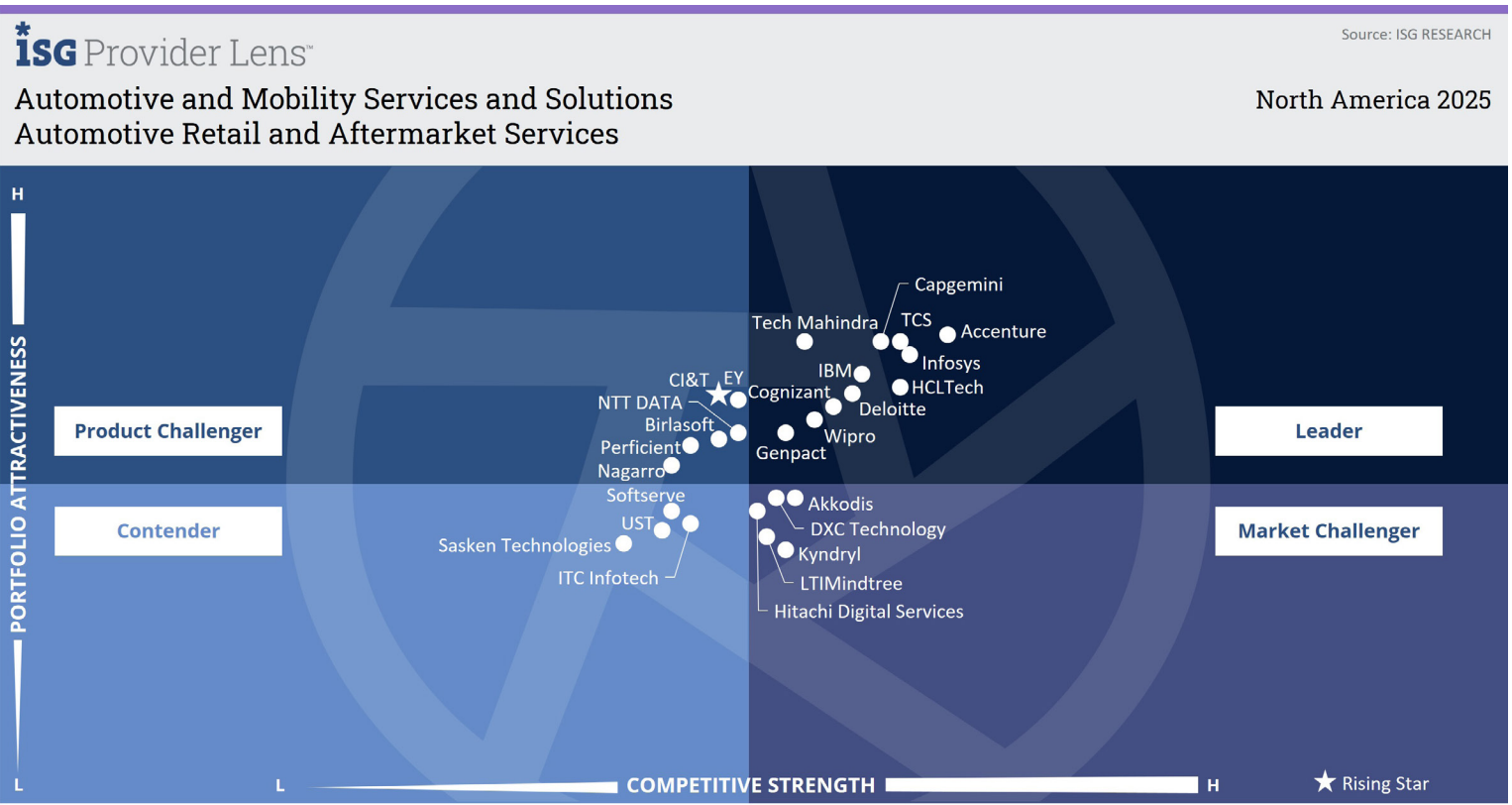
such as CMOs, should read this report to gain insights into market trends and consumer behavior and reevaluate their retail aftermarket service models to enhance CX.

Research and innovation leaders

such as innovation and production heads, should read this report to understand provider capabilities in data integration, product enhancements and after-sales support.

Technology leaders

such as CTOs, should read this report to implement cloud-based solutions and analyze the capabilities of tools such as AI to maintain the feedback loop for product enhancements.



The quadrant assesses service providers focused on the **automotive aftermarket and retail** services segment, offering all parts, accessories, dealer management and omnichannel experience to vehicles after their initial sale by OEMs.

Swadhin Pradhan

Definition

Automotive retail and aftermarket services play a crucial role in the overall health and sustainability of the automotive industry. Automotive retail management encompasses a wide range of activities, including showroom management, sales techniques, customer service, inventory control and after-sales support. By focusing on effective retail management, businesses can streamline operations, enhance customer satisfaction and drive sales growth.

A strong emphasis on customer service is particularly vital, as it fosters trust and loyalty, encouraging repeat business and referrals. The aftermarket services sector is equally important as it addresses the needs of vehicle owners after the initial sale. The aftermarket includes the manufacturing, distribution and retailing of vehicle parts and services post sale. This sector provides essential replacement parts and caters to consumers' desires for customization and enhanced vehicle performance.

Eligibility Criteria

1. **Experience in offering retail and aftermarket services** to clients in the automotive industry within the country or region (as per the scope of the study)
2. **Successful automotive retail and aftermarket services** related engagements (past and present) with at least three automotive companies
3. **Offerings and services in at least three** of the following areas related to automotive retail and aftermarket services:
   - Consumer experiences and expectations
   - Omnichannel strategies
   - Data utilization
   - Predictive inventory management
   - Supplier collaboration
   - Test drives and trade-ins
   - Online marketplaces
   - Maintenance and
   - repair services
4. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in automotive retail and aftermarket services
5. **Referenceable case studies** from key auto industry segments

Observations

The automotive aftermarket and retail services market is undergoing a significant transformation driven by digitalization, advanced technology integration and strategic partnerships. Companies are increasingly focusing on comprehensive service portfolios that include warranty management, analytics, inventory optimization and pricing strategies to enhance operational efficiency and customer satisfaction. The integration of technologies such as AI and ML, IoT and cloud solutions is crucial for streamlining processes such as inventory management and providing real-time insights, ultimately boosting profitability.

An emphasis on omnichannel solutions allows companies to unify online and offline customer interactions, creating seamless and personalized experiences. Strong partnerships with OEMs and technology firms are essential for gaining insights into industry trends and customer behavior, enabling firms to tailor their offerings to market demands. Data analytics plays a pivotal role, providing actionable insights that help automotive businesses understand performance metrics, customer behavior and sales trends.

The focus on aftermarket services facilitates the shift from transactional models to contractual and pay-for-performance approaches, enhancing service agreements and customer experiences. Established client relationships and retention strategies reflect the importance of understanding customer needs and delivering consistent and high-quality services. As EVs and mobility services grow in prominence, companies that leverage technological innovation and strategic collaborations are well positioned to adapt to the evolving landscape and maintain a competitive edge.

From the 100 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture's product-as-a-service enablement focuses on driving transformation in the automotive industry by leveraging engineering expertise, strategic acquisitions, digital platforms and CX innovations.

Capgemini

Capgemini's robust approach to service lifecycle management (SLM) and its leadership in digital transformation and innovative aftermarket services position it as a key player in driving efficiency and enhancing CX in the automotive industry.

cognizant

Cognizant is broadening its expertise beyond traditional IT strengths to include areas such as connected retail, omnichannel enablement and dealer management systems (DMS) to drive improved operational management and CX for automotive OEMs.

Deloitte.

Deloitte's offerings for the automotive industry provide integrated solutions that focus on enhancing dealer performance, optimizing aftermarket services and leveraging digitalization for greater operational efficiency.

Genpact offers a complete range of aftermarket services tailored for automotive companies, from logistics and supply chain optimization to customer support and service delivery.

HCLTech

HCLTech's focus on advanced cloud capabilities, strong OEM partnerships and comprehensive DMS positions it as a leader in the automotive retail space, assisting dealerships in achieving enhanced operational efficiency and competitiveness.

IBM's strategic partnerships, industry-specific solutions, AI application, hybrid cloud and advanced analytics within the automotive retail and aftermarket sectors facilitates automation and optimization of critical operations.

Infosys' incorporation of AI and ML technologies into its automotive solutions enables enhanced automation, predictive analytics and personalized customer interactions, supporting optimized operations and increased profitability.

TCS offers a wide range of services pertinent to automotive retail, including warranty management, analytics and reporting and inventory optimization to meet the specific needs of the North American market.

Tech Mahindra's AftEAZE platform and strategic focus on aftermarket services, technological integration and established partnerships position it as a leading player in the automotive industry.

Wipro's comprehensive warranty management services, robust inventory optimization solutions and strategic pricing management capabilities underscore its role as a key partner for automotive businesses in North America.

CI&T (Rising Star)

CI&T (Rising Star) positions itself as a trusted advisor to OEMs and automotive businesses by understanding the automotive supply chain dynamics and the consumer ecosystem, ensuring its solutions address core industry and customer needs.

Leader

"HCLTech's innovative analytics solutions optimize inventory levels, improve sales forecasts and enhance customer engagement strategies, enhancing overall performance in automotive retail."

Swadhin Pradhan

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 223,400 employees across over 220 delivery centers worldwide. In FY25, the company generated $13.8 billion in revenue, with IT and Business Services as its largest segment. HCLTech leverages its digital engineering and software capabilities to drive aftermarket and retail offerings around IoT, assets and digital twin. The company has many IPs and accelerators for supply chain, logistics and distribution. Its investment in data analytics tools empowers automotive retailers to extract actionable insights from vast datasets.

Strengths

Advanced cloud capabilities: HCLTech has established itself as a leader in cloud solutions tailored for the automotive retail space. The company's HCL Aftermarket Cloud integrates advanced analytics to offer real-time insights into inventory management, warranty claims and customer service. This digital transformation fosters enhanced operational efficiency by allowing dealerships to manage their resources more effectively and boost profitability.

Strong partnerships with OEMs: HCLTech maintains robust partnerships with key OEMs in North America, solidifying its position as a trusted service provider. Through collaboration, HCLTech offers customized aftermarket services that align closely with OEM specifications, ensuring clients receive high-quality support. This partnership enhances value proposition and helps HCLTech maintain a competitive advantage.

Comprehensive DMS: HCLTech provides a robust DMS that integrates accounting, inventory and customer relationship management into a single platform. This comprehensive solution reduces the burden of traditional systems, allowing dealerships to streamline operations and improve efficiency. HCLTech's system ensures dealers respond promptly to market demands, making them agile and competitive.

Caution

With the growing need to improve CX in the automotive space, HCLTech should implement AI and ML across areas such as diagnostics, service recommendations, tools, operations and parts required based on operations.

Technology Transformation and Consulting

Who Should Read This Section

This report is valuable for service providers offering technology transformation and consulting services in North America 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.

Technology leaders

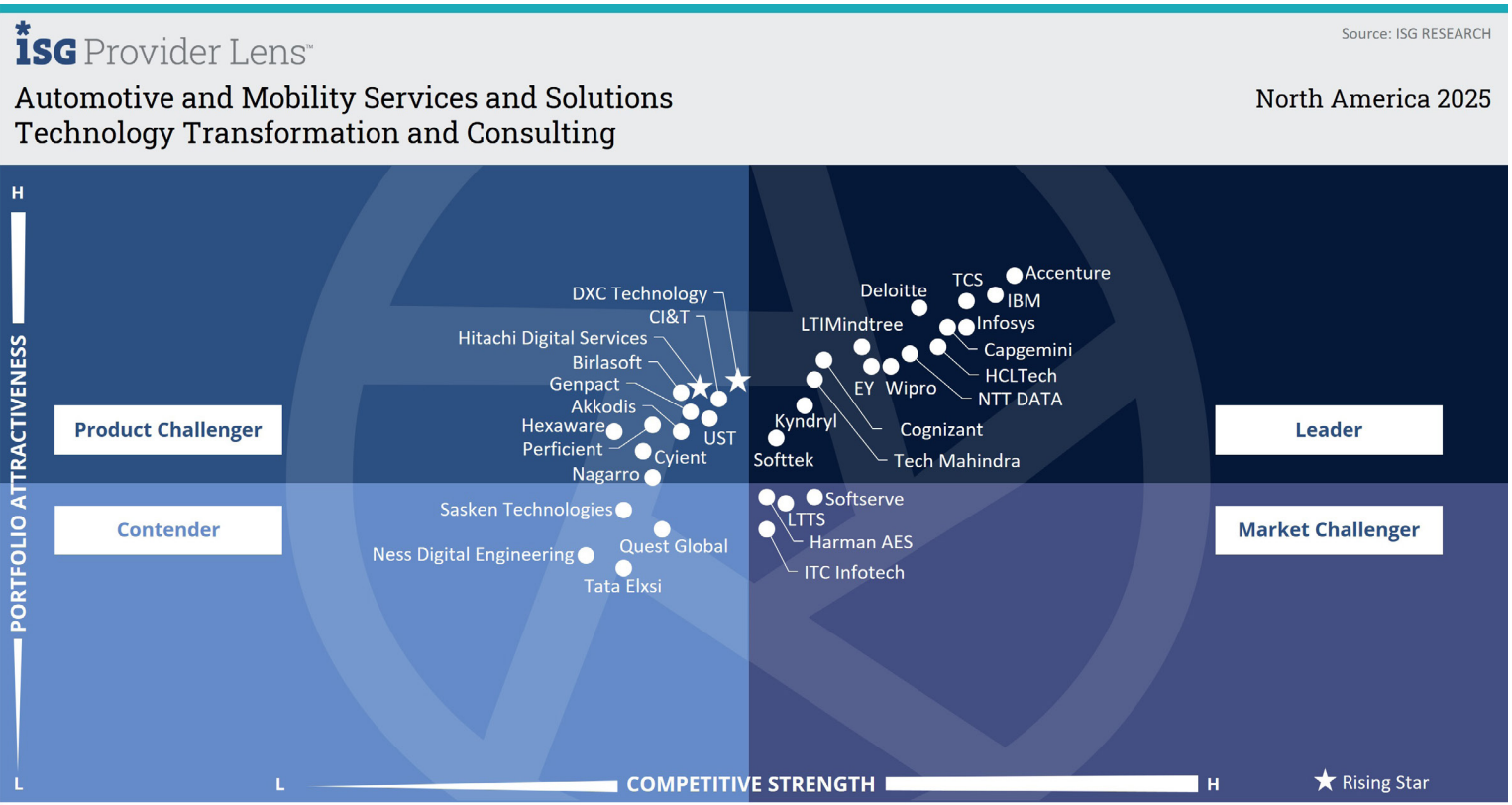
implementing and managing solutions should read this report to grasp the trends and opportunities in sustainability technology related to batteries, infrastructure and user offerings.

Digital leaders

should read this report to identify areas where technology and services can provide data-driven solutions for advancements in batteries, charging, grid management and smart infrastructure.

Strategy leaders

should read this report to develop informed strategies for navigating digital transition and optimizing operations for continuous technological innovation.



The quadrant assesses service providers focused on the automotive industry that **leverage AI, digital twins, cloud and cybersecurity** to optimize operations and drive innovation, helping organizations stay competitive in a rapidly evolving sector.

Swadhin Pradhan

Definition

Automotive companies must modernize and transform their IT infrastructure to streamline operations, improve efficiency and support business transformation initiatives. Such efforts are mainly driven by the need to improve efficiency and productivity, enhance CX, accelerate innovation, gain competitive advantages and achieve cost savings and sustainability goals.

Companies aim to achieve transformation by simplifying processes and extensive reengineering, using digital tools and methodologies that align with their strategic objectives. They leverage automation and AI and explore options such as ITO and BPO. They also reorganize IT operating models to meet changing business demands, leveraging global capability centers (GCCs) to improve revenues, optimize costs, achieve operational excellence and enhance business process efficiency.

Eligibility Criteria

1. Examples of work with various automotive players across the industry value chain to **develop a highly integrated model for driving transformation** through broad-based solutions
2. Initiatives in **business and operations** strategy, change management and end-to-end transformation
3. Experience in **reorganizing IT operating models** to align with changing business demands (GCCs, nearshoring, offshoring, agility and others)
4. Offerings and services in areas including, but not limited to:
   - Digital strategy development
   - IIoT
   - Big data analytics
   - Infrastructure and cloud (multicloud and hybrid cloud)
   - Cybersecurity (security operations centers and security information and event management [SIEM])
   - Service management
   - Vendor management
   - New-age ERP systems
   - Sustainability reporting
   - Cost optimization
   - Mobility solutions
   - Workforce enablement
   - Digital technology integration
   - Digitization or digitalization
   - Workplace of the future
5. Expertise in **next-gen technologies,** including automation, analytics, IoT, AI, GenAI, cybersecurity, cloud, AR, VR, MR, 3D printing and blockchain
6. **Strong partnerships** with industry associations, regulatory bodies, technology firms and startups specializing in automotive industry
7. **Referenceable case studies** from key auto industry segments

Observations

The automotive industry's technology consulting landscape is undergoing significant transformation, driven by the need for digital innovation and operational efficiency. Providers in this space are focusing on various aspects of technology, including digital strategy development, cloud computing, AI and advanced analytics, to support automotive companies in navigating the complexities of modern business. Consulting firms are leveraging their deep industry expertise to offer tailored solutions that address unique challenges, such as legacy system modernization, regulatory compliance and CX enhancement.

As companies increasingly adopt connected vehicles and SDVs, the importance of robust cybersecurity measures is escalating, prompting consultancies to integrate comprehensive security frameworks within their offerings. The emphasis on data-driven decision-making has increased the demand for advanced analytics capabilities, enabling automotive organizations to derive actionable insights from vast data sets.

The consulting landscape is characterized by a dynamic interplay of innovation, collaboration and strategic alignment to drive growth and resilience in the automotive industry. Collaborative partnerships with leading technology firms are becoming vital, enabling providers to deliver cutting-edge solutions such as digital twins, IoT applications and OTA software updates. As the sector shifts toward more agile and scalable approaches, consulting firms are expanding their service offerings to encompass all facets of the automotive value chain.

From the 100 companies assessed for this study, 34 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture's strategies for the automotive industry demonstrate a comprehensive framework that spans digital transformation, technology consulting and collaborative partnerships that help automotive clients manage their IT infrastructure and focus on core business areas.

Capgemini

Capgemini stands out in technology consulting and transformation with a comprehensive approach focused on helping automotive clients adopt transformative technologies that align with the principles of Industry 4.0.

cognizant

Cognizant strongly emphasizes cloud-based solutions driven by a commitment to innovation and extensive industry knowledge, enabling automotive clients to achieve necessary flexibility and scalability in a rapidly changing environment.

Deloitte.

Deloitte's strong emphasis on technology and operational consulting enables the industry's shift to SDVs and digital business models by integrating advanced technologies such as AI, IoT, cloud and analytics.

EY

EY guides automotive clients through significant technology transformations, emphasizing digitalization and the adoption of GenAI for product development, process optimization and vehicle autonomy.

LTIMindtree

LTIMindtree has developed a robust digital transformation framework that helps automotive organizations transition from legacy systems to digital-first solutions, focusing on assessment, strategy formulation and execution to achieve operational efficiency.

HCLTech

HCLTech leverages its strong digital engineering and consulting expertise to drive technology transformation in automotive companies. From design to lifecycle management, this approach supports all phases of product development.

IBM utilizes its Watson AI platform and consulting prowess to deliver a range of applications for the automotive industry, including predictive maintenance, anomaly detection and intelligent automation, facilitating enhanced decision-making.

Infosys is focused on developing digital strategy for the automotive industry, offering tailored solutions that enhance operational efficiency and customer engagement by aligning technology with business objectives and promoting agility through modern methodologies.

Kyndryl possesses deep industry insights and extensive experience across multiple sectors, delivering customized solutions to meet the automotive industry's and others' specific needs.

NTT DATA provides comprehensive technology consulting services, guiding clients through strategy development and implementation to facilitate organizational transformation in the automotive industry.

Softtek

Softtek offers consulting services that focus on developing digital strategies centered around IoT, big data analytics and cloud computing, enhancing operational efficiency and driving innovation in the automotive industry.

TCS is recognized in the automotive space for delivering innovative digital solutions that drive business transformation, leveraging advanced technologies to enhance CX and foster innovation.

Tech Mahindra specializes in legacy application modernization, helping automotive companies transition outdated IT systems to streamline operations, improve efficiency and leverage new technologies while reducing costs.

Wipro excels in developing tailored digital strategies for automotive enterprises, leveraging deep domain knowledge and advanced technologies to help organizations navigate digital disruption.

DXC Technology (Rising Star) specializes in IT modernization, employing sophisticated change management strategies to facilitate seamless transitions from legacy systems to modern platforms.

Hitachi Digital Services (Rising Star)

Hitachi Digital Services (Rising Star) stands out in the automotive industry for its end-to-end digital transformation expertise, advanced technology integration, future factory, smart manufacturing solutions and a flexible, partnership-driven approach.

Leader

"HCLTech leverages its extensive expertise in digital strategy development, engineering and IT infrastructure to assist companies in navigating the complexities of the digital landscape in the automotive space."

Swadhin Pradhan

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 223,400 employees across over 220 delivery centers worldwide. In FY25, the company generated $13.8 billion in revenue, with IT and Business Services as its largest segment. The company's technology transformation services are designed to help automotive companies modernize and transform their IT infrastructure to streamline operations, improve efficiency and support business transformation initiatives. HCLTech's Industry NeXT and IoT offerings enhance organizations' digital growth with state-of-the-art technology solutions, powering business transformation with technology excellence.

Strengths

Deep digital engineering expertise: HCLTech's capability in the digital engineering space is a significant strength in technology transformation for automotive companies. This expertise supports various phases of product development, from initial design to lifecycle management. The company's comprehensive suite of cloud computing, big data and analytics and edge solutions facilitate scalability, flexibility and cost-effectiveness for the automotive industry.

Integrated cybersecurity and compliance solutions: HCLTech offers end-to-end security solutions that safeguard digital assets and ensure compliance with industry regulations. By integrating security measures into every aspect of service delivery, HCLTech helps organizations build resilience against potential threats. This proactive approach to cybersecurity protects clients' operations and instills confidence among stakeholders.

Integrated digital strategy development: By utilizing a data-driven approach, HCLTech helps organizations create actionable strategies that align with their digital reinvention and business goals. By integrating advanced analytics capabilities into business operations, HCLTech helps clients unlock valuable information hidden within their data to drive informed decision-making.

Caution

HCLTech should focus on digital consulting to develop solutions and offerings using new age technologies such as GenAI and quantum computing to address industry complexities. It should consider increasing its focus on building reusable IPs, enabling domain- and industry-specific LLMs and small language models.

Appendix

The ISG Provider Lens 2025 – Automotive and Mobility study analyzes the relevant software vendors/service providers in the North American market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Analyst:
Swadhin Pradhan

Editor:
Priyanka Richi

Research Analyst:
Akshay S Hiremath

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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 July 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 ($) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Automotive and Mobility market
2. Use of questionnaire-based surveys of service providers/ vendors 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 and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following main 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

Lead Analyst

Swadhin Pradhan

Assistant Director and Principal Analyst

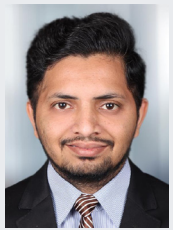
Swadhin Pradhan brings more than two decades of technology, business and market research experience and expertise to ISG clients. He has rich experience in executing market/competitive intelligence (MI/CI) and quasi-consulting projects in the manufacturing, energy and resources industry.

Prior to ISG, Swadhin worked with MI/CI and thought leadership organizations of large tech and consulting firms such as IBM and Deloitte. At ISG, He is focused on ISG Provider Lens™.

His research and analysis for ISG clients is focused on Manufacturing and Energy and Utilities market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

Swadhin holds an MBA in Marketing and Finance from Institute for Integrated Learning in Management (IILM), New Delhi, and an engineering degree in Electronics and Telecom.

Research Analyst



Akshay Hiremath S

Senior Research Analyst

Akshay S Hiremath is a research analyst at ISG and supports ISG Provider Lens™ studies on HCM Technology Platforms, Payroll Solutions and Services, and Transformational HRO studies. He supports the lead analysts in the research process and authors the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. He has been associated with ISG since 2022.

Prior to this role, he was involved in preparing customized reports for various clients mainly related to HR services such as Permanent Recruitment, Temporary Staffing, and Corporate Learning and Development., through secondary research that included market analysis, supplier analysis and profiling, and industry best practices.

Study Sponser

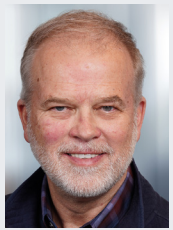
Iain Fisher

Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens/ISG Research

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.

ISG 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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JULY, 2025

REPORT: AUTOMOTIVE AND MOBILITY SERVICES AND SOLUTIONS