ISG Provider Lens®

Automotive and Mobility Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | APRIL 2026 | EUROPE AND NORTH AMERICA

Table of Contents

Introduction 3

About the Study
- Quadrants Research 5
- Definition 6
- Quadrants by Regions 13
- Schedule 14

Client Feedback Nominations 15

Methodology & Team 16

Contacts for this Study 17

Advisor Involvement
- Advisor Involvement - Program Description 18

Invited Companies 19

About our Company & Research 22

Introduction

The automotive industry remains a core driver of global manufacturing and innovation, with the end-to-end value chain covering vehicle design and engineering through to production, marketing and distribution. The industry continues to be shaped by disruptive technologies, evolving consumer expectations and accelerating transition toward electric and autonomous options. These factors have elevated the strategic importance of automotive services and solutions in managing product complexity, ensuring regulatory compliance and embedding digital capabilities across operations. To remain competitive, companies must adopt integrated platforms and solutions that streamline vehicle development (both vehicle body and mechanisms), enhance efficiency and enable rapid responsiveness to market dynamics.

Automotive services are central to digital transformation and sustained growth. As manufacturers shift from internal combustion engines to electric and autonomous vehicles, agile methodologies and flexible IT architectures have become indispensable for reduced operational costs, adaptability and long-term sustainability. Solutions such as product lifecycle management (PLM) technologies, industrial IoT (IIoT) and advanced analytics are vital in optimizing processes, safeguarding quality and elevating CX. With these solutions, organizations can maximize asset utilization, accelerate innovation cycles and deliver next-generation vehicles in line with changing consumer expectations.

The Automotive and Mobility Services and Solutions 2026 study evaluates the capabilities of providers enabling the transformation of this dynamic and competitive industry.

Automotive and Mobility Services and Solutions 2026

- Innovation (IP – Accelerators)
- Partnerships (Tiers – Types)
- Competency and Talent (Resources – Certifications)
- Industry Focus and Alignment
- Experience and Engagement

Automotive Engineering and Manufacturing Services

Capabilities

- Design and Development
- Manufacturing Engineering
- Testing and Validation
- Digital Twins
- Prototype Construction
- Production Planning
- Quality Management

Electric Vehicles (EVs) and Mobility Services

Capabilities

- Subscription Models
- Charging Infrastructure Access
- Customer Relationship Management (CRM)
- Data Analytics and Optimization
- Micromobility
- Fleet Management Solutions
- Sustainability

Autonomous Systems and Software-defined Vehicles (SDVs)

Capabilities

- OTA Updates
- Levels of Autonomy
- Predictive Maintenance
- Communication Capabilities
- Vehicle to Everything
- LiDAR
- Enhanced Performance

Automotive Retail and Aftermarket Services

Capabilities

- Independent Aftermarket
- Parts Distribution
- Technology Integration
- Sustainability
- Omnichannel Support
- Inventory Management
- Logistics
- Circular Economy

Automotive Industry: Mid-tier and Specialist

Capabilities

- Risk Audits
- JIT/JIS Delivery
- Production Scheduling
- PDI
- ERP Implementation
- Cybersecurity and OT Security
- MES/PLM Implementation
- Change Management

Key focus areas for automotive and mobility services and solutions 2026

- **Automotive Engineering and Manufacturing Services**
- **Electric Vehicles and Mobility Services**
- **Autonomous Systems and Software-defined Vehicles**
- **Automotive Retail and Aftermarket Services**
- **Automotive Industry: Mid-tier and Specialist**

Simplified Illustration Source: ISG 2026

Definition

The ISG Provider Lens® Automotive and Mobility Services and Solutions 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 markets in North America and Europe.

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.

Mid-tier and specialist IT service providers

Mid-tier providers generate less than $2 billion in revenue and typically specialize in 3–4 verticals where they hold strong capabilities and significant revenue share. These providers adopt an agile and flexible approach, making them well-suited to serve both large enterprises and midmarket clients with tailored, industry-specific solutions. They also have strong inherent capabilities and heritage in digital engineering services. This combination of domain expertise, flexibility and a strong focus on innovation positions them as effective partners for businesses seeking to implement cutting-edge technologies with a faster, more agile approach.

Specialists are service providers uniquely positioned due to their niche capabilities that are either strongly embedded in specific verticals (for example, healthcare, financial services) or concentrated on specialized service areas such as AI and analytics. Typically, these providers focus intensely on 2–3 verticals where they hold a significant market share and expertise, allowing them to deliver highly tailored and innovative solutions. Specialists leverage their agility and flexibility to serve both large and midmarket enterprises. Their approach emphasizes solution-based problem solving, making them highly responsive to the specific needs of their clients.

Definition

In 2026, automotive engineering remains a cornerstone of the automotive industry, encompassing the design, development, manufacturing and rigorous testing of vehicles and their components. It integrates mechanical, electrical and software engineering to deliver safe, efficient and intelligent mobility solutions. Innovations here have driven advances in fuel efficiency, safety systems and smart technologies, while sustainability and electric vehicle (EV) development have become priorities in mitigating environmental challenges.

Equally vital is manufacturing, which focuses on vehicle assembly and optimization of production processes to reduce costs and enhance efficiency. The synergy of engineering and manufacturing is the base of competitiveness in this evolving market. These core functions enable automotive companies to hasten innovation, meet regulatory demands and deliver next-generation vehicles that align with consumer expectations and sustainability goals.

Eligibility Criteria

1. Experience in **offering engineering and manufacturing services** to the region's automotive industry clients
2. **Have successful automotive engineering- and manufacturing services-related engagements, current or past,** with at least three automotive companies
3. **Offer services and solutions in at least three** of the following automotive engineering and manufacturing service areas:
   - 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. **Have strong partnerships with industry associations,** regulatory bodies, technology firms and startups specializing in the automotive industry
5. Demonstrate **referenceable use cases** for various services and solutions in the **automotive industry** value chain

Definition

The automotive industry is undergoing a major transformation with advances in electric vehicles (EVs) and modern mobility, key to mitigating sustainability, environmental and mobility challenges. As transportation is a major contributor to greenhouse gas emissions, EVs are now critical for decarbonization, reducing dependence on fossil fuels, lowering air pollution and supporting healthy communities. This transition is more than a technical move; it is a fundamental change in how the world perceives mobility, embedding sustainability at the core of all transportation strategies.

Integrating EVs and modern mobility services into urban planning and public transit systems enhances efficiency, and accessibility. Governments and industry leaders play a critical role in accelerating adoption with initiatives such as EV charging infrastructure investments and targeted incentives for purchases. Such measures are establishing a resilient, sustainable and future-ready transportation ecosystem.

Eligibility Criteria

1. Experience in **offering EV and mobility services** to the region's automotive industry clients
2. Have successful **EV- and/or mobility services-related engagements,** current or past, with at least three automotive companies
3. Offer **services and solutions in at least three** of the following areas related to EVs and mobility services:
   - Charging infrastructure
   - Smart charging solutions
   - Connected services
   - Battery technology and management
   - Renewable energy adoption
   - New business models
   - Electric mobility supply chain
   - Electricity grid
   - Information, communication and monitoring
4. Have strong **partnerships with industry associations,** regulatory bodies, technology firms and startups specializing in the automotive industry
5. Demonstrate referenceable **automotive use cases** for various services and solutions across the EV and mobility value chain

Definition

In 2026, autonomous technologies and software-defined vehicles (SDVs) will continue to reshape the automotive industry, redefining vehicles through enhanced safety, efficiency and UX. AI-powered autonomous systems enable advanced features such as adaptive cruise control, lane-keeping assistance and automatic emergency braking, while predictive maintenance systems identify potential issues before escalation, extending vehicle lifespan and optimizing performance.

SDVs mark a paradigm shift in automotive design and functionality, positioning software as the core of value creation. Over-the-air updates allow manufacturers to continuously upgrade the vehicles even after purchase, eliminating the need for physical modifications, ensuring vehicles are adaptable to evolving technologies, regulatory requirements and consumer expectations throughout their lifecycle. Autonomous systems and SDVs are setting new standards for innovation, competitiveness and sustainability in the automotive industry.

Eligibility Criteria

1. Experience in **offering autonomous systems and SDV services** to the region's automotive industry clients
2. Have successful **autonomous system- and SDV services-related engagements,** current or past, with at least three automotive companies
3. Offer **services and solutions in at least three** of the following autonomous systems and SDV service areas:
   - 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. Have strong **partnerships with industry associations,** regulatory bodies, technology firms and startups specializing in the automotive industry
5. **Demonstrate referenceable case studies** from key auto industry segments

Definition

In 2026, automotive retail and aftermarket services remain critical in closing the engineering and design loop, important for new product introductions. Retail management spans showroom operations, sales strategies, customer engagement, inventory oversight and after-sales support. Effectiveness here streamlines processes, enhances customer satisfaction and drives revenue. A focus on service excellence is vital, building trust, fostering loyalty, and encouraging repeat purchases and referrals, reinforcing long-term success.

Equally significant is the aftermarket segment, which encompasses the production, distribution and retailing of replacement parts and value-added services, including essential maintenance and demand for customization and performance upgrades from consumers. Together, retail and aftermarket services form a strategic foundation, enabling automotive companies to remain competitive, resilient and responsive in a rapidly evolving automotive market.

Eligibility Criteria

1. Experience in **offering retail and aftermarket services** to the region's automotive industry clients
2. Have successful **automotive retail- and aftermarket services-** related engagements, current or past, with at least three automotive companies
3. Offer **services and solutions in at least three** of the following automotive retail and aftermarket service areas:
   - 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. **Have strong partnerships with industry associations,** regulatory bodies, technology firms and startups specializing in manufacturing for the automotive market
5. **Demonstrate referenceable case studies** in key automotive industry segments

Definition

In 2026, the automotive industry continues to evolve through developments in engineering, advanced manufacturing, electrification, autonomy and retail innovation. Automotive engineering remains a cornerstone, integrating the aspects of mechanical, electrical and software to deliver safe, efficient and intelligent mobility solutions. Advances in fuel efficiency, safety systems and smart technologies are critical in addressing environmental challenges. Manufacturing plays an equally vital role, optimizing assembly and production to reduce costs and enhance efficiency. Engineering and manufacturing together drive competitiveness in a rapidly changing industry.

For Mid-tier providers and specialists, the dynamic environment of the market — advances in automotive engineering and mobility, emergence of EVs and SDVs, and the growing relevance of automotive retail and aftermarket — presents a significant opportunity. Mid-tier firms leverage agility, domain expertise and digital engineering heritage to deliver tailored solutions.

Specialists, focused on niche/advanced segments such as AI and analytics, provide highly customized, solution-driven solutions. Together, these providers can be effective partners for companies seeking innovation, resilience and sustainable growth in the automotive industry.

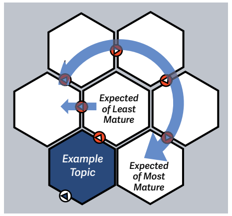
Eligibility Criteria

1. Experience in **offering automotive industry services** to the region's clients
2. Have successful **automotive industry services-related engagements, current or past**, with at least three automotive companies
3. Offer **services and solutions in at least three** of the following areas of the automotive industry :
   - Supplier coordination for Tier-2/3 parts with JIT/JIS delivery and risk audits
   - Vendor-managed inventory (VMI) and sourcing optimization
   - Logistics tracking across ports/ warehouses to mitigate disruptions such as chip shortages
   - Production scheduling, multi-plant coordination and plant optimization
   - Quality compliance and inventory planning.
   - Warranty/recall management
   - Telematics, OTA updates and remote diagnostics.
   - Fleet maintenance, charging support and customer multichannel support
   - Spare parts logistics to aftermarket/service centers
   - Digital transformation, change management and servitization.
   - Cybersecurity and OT security
   - MES, ERP and PLM implementation
4. **Have strong partnerships with industry associations,** regulatory bodies, technology firms and startups specializing in manufacturing for the automotive industry
5. **Demonstrate referenceable case studies** from key auto industry segments
6. Have **annual revenue below $2 billion**

ISG's Automotive and Mobility Services and Solutions Framework

- Encapsulates what enterprises are doing across the Automotive and Mobility Services and Solutions 2026 market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions

Understanding the Mosaic



Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following five quadrants on Automotive and Mobility Services and Solutions 2026.

Quadrant	Europe	North America
Automotive Engineering and Manufacturing Services	✓	✓
Electric Vehicles and Mobility Services	✓	✓
Autonomous Systems and Software-defined Vehicles	✓	✓
Automotive Retail and Aftermarket Services	✓	✓
Automotive Industry: Mid-tier and Specialist	✓	✓

The research phase falls in the period between April and June 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2026.

Milestones	Beginning	End
Survey Launch	April 20, 2026	
Survey Phase	April 20, 2026	May 20, 2026
Sneak Preview	July 2026	August 2026
Press Release & Publication	September 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® 2026 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 Automotive and Mobility Services and Solutions 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

ISG Star of Excellence

The ISG Provider Lens® 2026 – Automotive and Mobility Services and Solutions study analyzes the relevant 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 April 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

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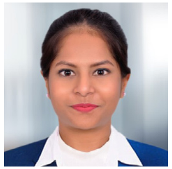

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Data Specialist

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ISG Provider Lens® Advisors Involvement Program

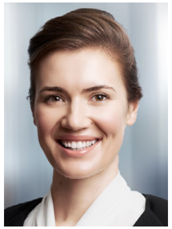
ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/ technology trends, service provider presence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



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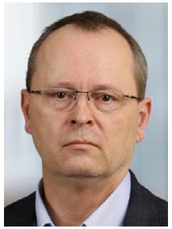
Director - Europe



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Digital Engineering Solutions Lead - North America

Rajeev Chatrath

Principal Consultant - Europe

Ryan Hamze

Director - North America

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.

* Rated in previous iteration

Accedia
Accenture*
Accolite Digital
Accso
ACL Digital
Adesso
AFRY
Akkodis*
Alectra Energy Solutions
All For One Group
Allied Digital
Altair
ALTEN
Altia
amplimind

AND Digital
Anmerkung Solutions
Apexon
Aptiv*
Ascendion
AsInt, Inc.
Atos
Axiscades
Bertrandt
BIP Group
Birlasoft*
Bluebinaries
Bosch SDS
Capgemini*
Caresoft Global

CENIT AG
Centum Electronics
CGI
CI&T*
Ciklum
CMIT Solutions
CMS IT Services
Coforge
Cognisys
Cognitus Consulting
Cognizant*
Convista
Cyient*
Daffodil Software
Datamatics Global Services

Delaware North America
Deloitte*
Devoteam
DXC Technology
EDAG
eInfochips*
ELEKS
Encora
Endava
Engineering Industries eXcellence
EPAM
Eviden (an Atos Business)
EXL
Expleo
EY*

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.

* Rated in previous iteration

e-Zest/Accion Labs
FERCHAU
Firstsource
FORCAM
FPT Software*
Fujitsu
Genpact*
Gilbarco (Everse)
GlobalLogic
Globant
Happiest Minds
HCLTech*
Hexaware*
Hitachi Digital Services*
HTC

IBM*
Infinite Computer Solutions
Infogain
Infosys*
Innominds
Innova Solutions
Innover Digital
Inspirage
Intelizign
Intellias
ITC Infotech*
Itransition
JIT Team
Kairos
Kongsberg IT

KPIT*
KPMG
Kyndryl*
LatentView
LeverX
LTM*
LTTS*
Mastek
Meriplex
Metafyre
MHP - A Porche Company
Microland
Mindteck
Motherson Technology Services
Movate

Mphasis
Myntex
Nagarro*
NCS
NEC
Ness Engineering
N-iX
NOYNIM IT Solutions
Ntiva
NTT DATA*
Onomotion GMBH
Onward Tech
Orange Business Services
Orion Innovation
Perficient*

Invited Companies

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* Rated in previous iteration

Persistent Systems
Prescient Solutions
Publicis Sapient
PwC*
Qualitest
Quantron AG
Quest Global*
Randstad Digital*
Robosoft Technologies
SAIC
Samsung SDS
Sasken
ScienceSoft USA Corporation
Shift 5
Siemens Advanta
SII
Softdel
Softserve*
Softtek*
Sonata Software
Sopra Steria
Stefanini
Sutherland
Synoptek
Syntax
Tata Elxsi*
Tata Technologies
TCS*
Tech Mahindra
Tietoevry
T-Systems*
UST Global
VVDN Technologies*
Wipro*
Wipro Engineering - Connected Services
WNS
Xebia
Xoriant
Zensar

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™

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ISG

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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.

For more information, visit isg-one.com.

ISG Provider Lens®

APRIL, 2026

BROCHURE: AUTOMOTIVE AND MOBILITY SERVICES AND SOLUTIONS