Automotive and Mobility Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | JANUARY 2025 | NORTH AMERICA, EUROPE AND ASIA PACIFIC (INCLUDING CHINA)

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Introduction

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.

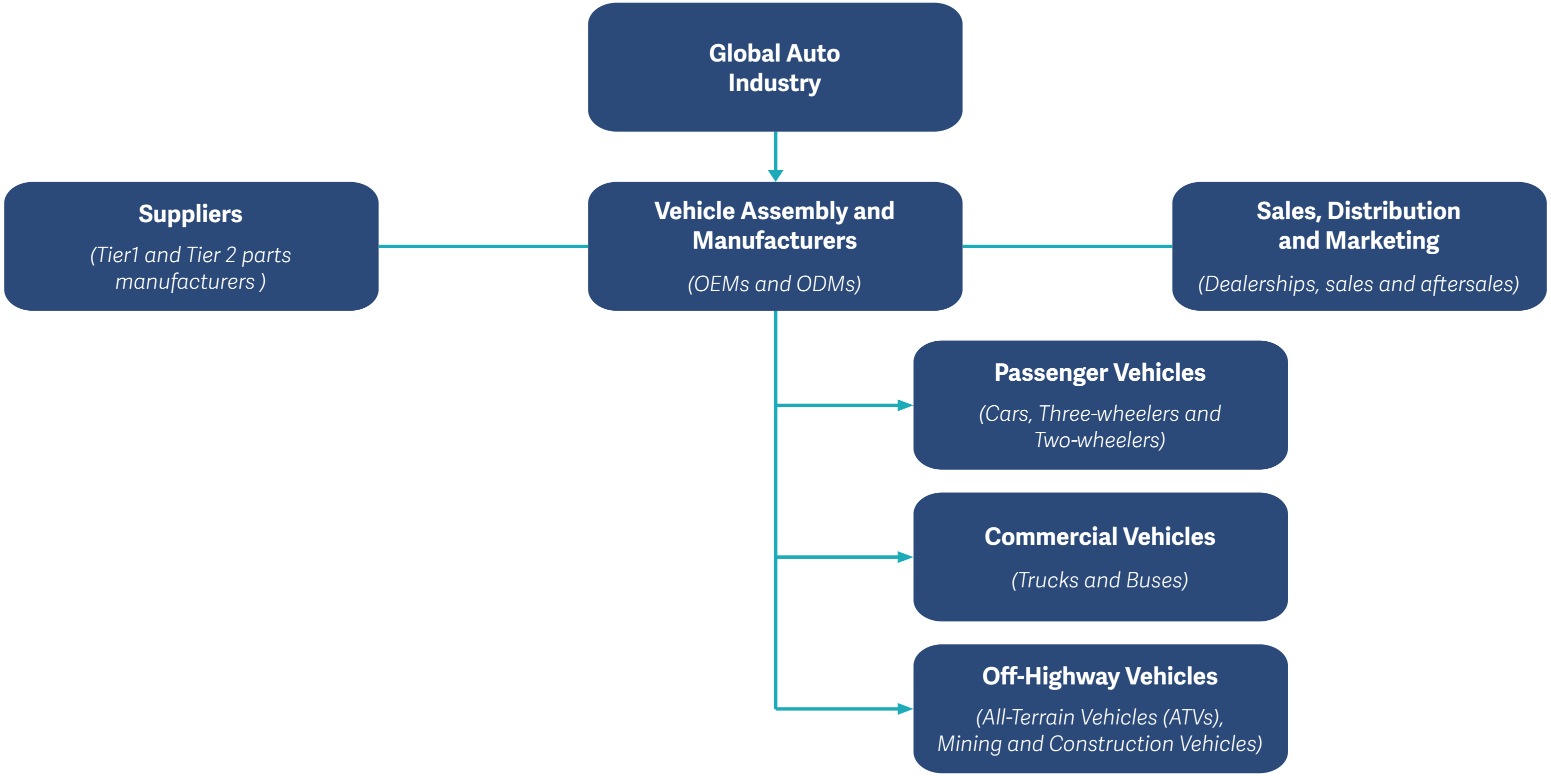
Blueprint* – Automotive and Mobility Services Industry

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

	Capabilities							
Automotive Engineering and Manufacturing Services	Design and Development	Manufacturing Engineering	Testing and Validation	Digital Twins	Prototype Construction	Production Planning	Quality Management	
EVs and Mobility Services	Subscription Models	Charging Infrastructure Access	Customer Relationship Management	Data Analytics and Optimization	Micromobility	Fleet Management Solutions	Sustainability	
Autonomous Systems and Software-Defined Vehicles	OTA Updates	Levels of Autonomy	Predictive Maintenance	Communication Capabilities	Vehicle to Everything	LiDAR	Enhanced Performance	
Automotive Retail and Aftermarket Services	Independent Aftermarket	Parts Distribution	Technology Integration	Sustainability	Omni Channel Support	Inventory Management	Logistics	Circular Economy
Technology Transformation and Consulting	Digital Transformation	Change Management	ERP	Sustainability	Mobility	M&A Services	Cost Management	AI/GenAI

*Non-exhaustive

Auto Industry Structure



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

- 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

Simplified Illustration Source: ISG 2025

The ISG Provider Lens™ Automotive and Mobility Services and Solutions 2025 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 different markets, including North America, Europe and Asia Pacific (including China)

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

Definition

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

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

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 manufacturing
5. Referenceable case studies from key auto industry segments

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 manufacturing
5. Referenceable case studies from key auto industry segments

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 manufacturing
7. Referenceable case studies from key auto industry segments

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 2025:

Quadrant	North America	Europe	Asia Pacific (including China)
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	✓	✓	✓

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Automotive and Mobility Services and Solutions 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
- Green tiles represent where an ISG Software Research will produce a Buyers Guide in 2025

ISG Provider Lens™

Schedule

The research phase falls in the period between December 2025 and <May 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2025>.

Milestones	Beginning	End
Survey Launch	January 23, 2025	
Survey Phase	January 23, 2025	February 20, 2025
Sneak Preview	May 2025	
Press Release & Publication	June 2025	

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

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided 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 2025 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 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing 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 concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, 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 will be 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 context of 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.

It is our vision that the Star of Excellence™ will be recognized 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 Client nomination 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 2025 – Automotive and Mobility Services and Solutions research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Analysts:
Harish B, Swadhin Pradhan and Mohdaves Malik

Research Analyst:
Akshay S Hiremath

Data Analyst:
Akshay Rathore

Principal Consultants:
John Lytle, Matteo Gallina, Rohit Bhatt and Rajeev Chatrath

Project Manager:
Donston Sharwin

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Contacts For This Study

Study Sponsor

Iain
Fisher

Global

Donston
Sharwin

Project Manager – Global

Harish B

Lead Analyst – Europe

Swadhin
Pradhan

Lead Analyst – U.S.

Mohdaves
Malik

Lead Analyst – Asia Pacific (Including China)

Akshay S
Hiremath

Research Analyst

Akshay
Rathore

Data Analyst

ISG Provider Lens Advisors Involvement Program

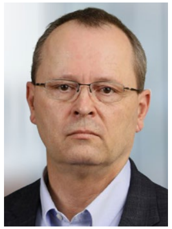
ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence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

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

ISG Advisors to this study



John Lytle

Director, Manufacturing

Matteo Gallina

Digital Engineering Solutions Lead Americas, Engineering Services

Rohit Bhatt

Director, Engineering Services

Rajeev Chatrath

Principal Consultant, Engineering Services

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.

Accenture
Accolite Digital
ACL Digital
AFRY
Akkodis
Alectra Energy Solutions
All for One Group
Allied Digital
Altair
ALTEN
amplimind
Apexon
Aptiv
Ascendion

Atos
Axiscades
Bertrandt
BIP Group
Birlasoft
Bluebinaries
Bosch SDS
Capgemini
Caresoft Global
Centum
CGI
CI&T
CMIT Solutions
CMS IT Services

Coforge
Cognizant
Cyient
Daffodil Software
Datamatics Global Services
Deloitte
DXC Technology
EDAG
eInfochips
Encora
Endava
Engineering Industries eXcellence
EPAM
Eviden (an Atos Business)

Expleo
EY
e-Zest/Accion Labs
FORCAM
Fujitsu
Genpact
Gilbargo (Everse)
GlobalLogic
Globant
Happiest Minds
HARMAN DTS
HCLTech
Hexaware
Hitachi Digital Services

Invited Companies

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IBM
Infinite
Infogain
Infosys
Innominds
Innova Solutions
Innover Digital
Intelizign
Intellias
ITC Infotech
Kairos
KPIT
KPMG
Kyndryl
LeverX
LTIMindtree
LTTS
Mastek
Meriplex
Metafyre
Mindteck
Motherson Technology Services
Movate
Mphasis
Nagarro
NEC
Ness Engineering
N-iX
Ntiva
NTT DATA
Onomotion GMBH
Onward Tech
Orange Business Services
Orion Innovation
Perficient
Prescient Solutions
Publicis Sapient
PwC
Qualitest
Quantron AG
Quest Global
Randstad Digital
Robosoft Technologies
SAIC
Samsung SDS
Sasken
SII
SLK Group
Softtek
Softdel
Softserve
Sonata Software
Sopra Steria
Stefanini
Sutherland
Synoptek

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Tata Elxsi

Tata Technologies

TCS

Tech Mahindra

Tietoevry

T-Systems

UST Global

VVDN Technologies

Wipro

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, while 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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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

JANUARY, 2025

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