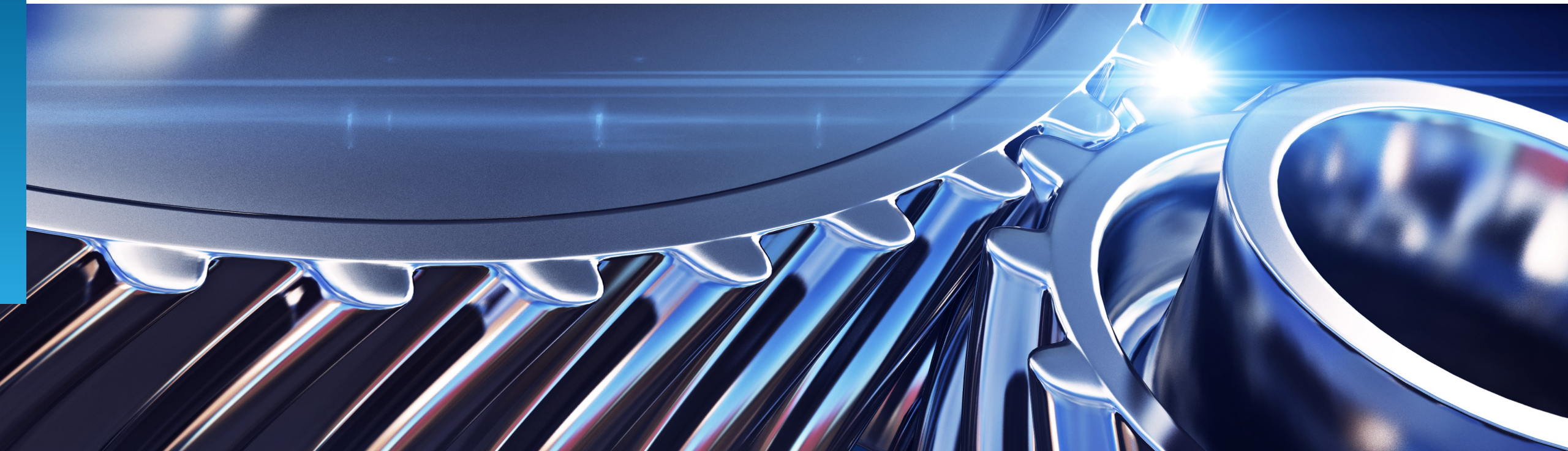


# Exploring the Future of Mobility: Autonomous, Connected, Electric, and Shared (ACES) Mobility Automotive Engineering Services PEAK Matrix® Assessment 2021

August 2021: Complimentary Abstract / Table of Contents



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## Background and introduction of the research

Changing global demand and perception surrounding a vehicle and the evolving experience-centricity around what it can offer is altering the automotive landscape. We see several trends impacting the industry; large OEMs have already started their journeys towards what is being perceived as the next normal. Some of these trends include:

- Global sustainability concerns, a carbon-free society, and reducing dependence on fossil fuels have resulted in moving propulsion technologies to hybrid and electric
- Technological advances in artificial intelligence and machine learning, combined with the low cost of sensors and improved networking technologies, have created a significant market for autonomous driving and Advanced Driver Assistance Systems (ADAS)
- Connectivity and data management are being used to optimize R&D and production costs, and even implement predictive maintenance and other new services
- Rising software-centricity in a vehicle and the entry of newer players is disrupting the market and accelerating the shift towards a technology-centric future

These developments have fueled the need to establish a compelling ecosystem of partners, and engineering service providers are actively enhancing their capabilities and offerings to help enterprises tackle these challenges in their automotive engineering journey, stay relevant, and create experience-centric offerings for the end-consumers.

This research, the third edition of Everest Group's **ACES Automotive Engineering Services PEAK Matrix®** Assessment, evaluates 23 engineering service providers, features them on the PEAK Matrix®, and shares insights into enterprise sourcing considerations. The study is based on RFI responses from service providers, interactions with their automotive engineering leadership, client reference checks, and an ongoing analysis of the engineering services market.

**The report assesses the following 23 leading engineering service providers featured on the ACES Automotive Engineering Services PEAK Matrix®:**

- **Leaders:** Alten, Capgemini, HCL Technologies, KPIT, LTTS, TCS, and Wipro
- **Major Contenders:** Akka Technologies, AVL, Bertrandt, Cognizant, DXC Luxoft, FEV, IAV, Intellias, NTT DATA, Tata Elxsi, Tech Mahindra, and UST Global
- **Aspirants:** eInfochips, Sasken, Semcon, and Sigma Software

### Scope of this report:



**Geography**  
Global



**Service providers**  
23 leading broad-based and pure-play engineering service providers



**Services**  
Automotive engineering services

## Overview and abbreviated summary of key messages

This report examines the global automotive engineering services landscape and assesses 23 engineering service providers. It focuses on service provider capabilities and market impact in helping enterprises create experience-centric, secured, and resilient next-generation automotive products. It also identifies the key implications of the research findings for enterprises and service providers.

Some of the findings in this report, among others, are:

### Service provider position and delivery capability

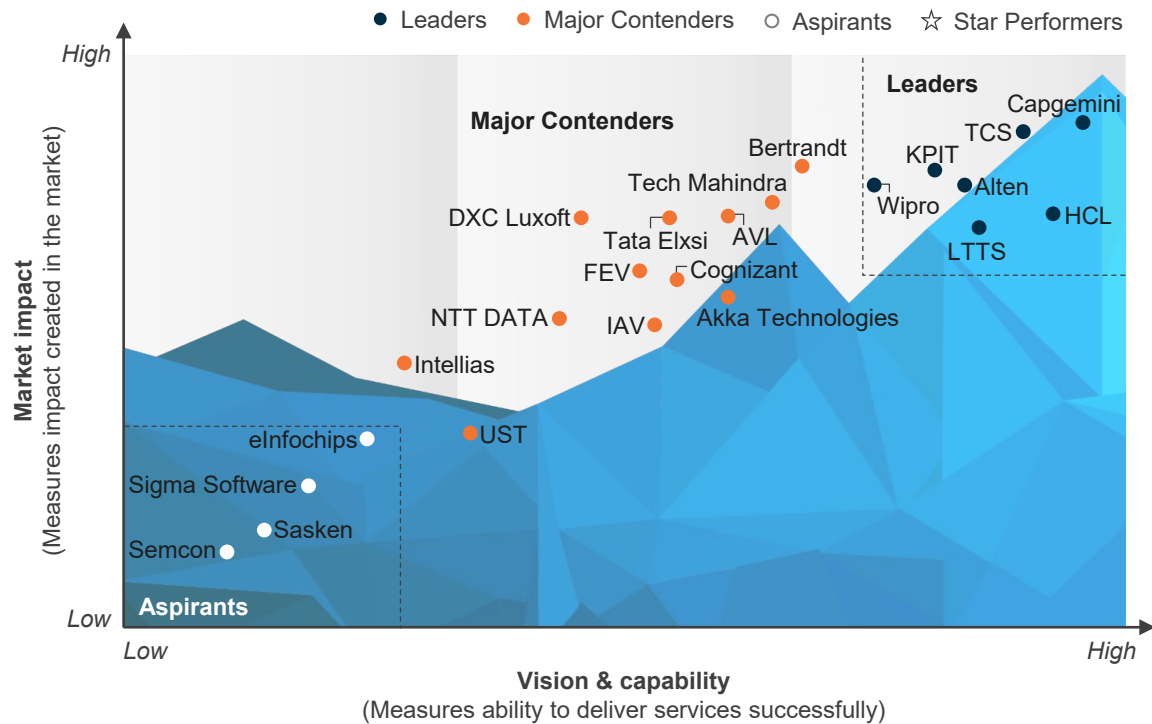
- Service providers can be categorized into leaders, major contenders, and aspirants on a capability-market-share matrix for ACES automotive engineering services
- Alten, Capgemini, HCL Technologies, KPIT, LTTS, TCS, and Wipro are the current leaders in the global automotive engineering services market. However, several service providers are emerging as major contenders

### Service provider characteristics

- The Leaders segment includes a mix of engineering service providers and broad-based IT heritage firms, which have developed dominant capabilities in offering multi-disciplinary automotive engineering services. They differentiate themselves with an end-to-end value proposition across emerging domains and service elements, as well as traditional automotive offerings
- Leaders are making considerable infrastructure investments in CoEs and labs to showcase their capabilities in areas such as ADAS, sensor fusion, electric propulsion, telematics, and connected platforms
- Major Contenders also comprise both IT-heritage firms as well as pure-play engineering service providers. While some of these players are large players in traditional automotive segments, they are trying to transform their existing portfolios and addressing the current concerns OEMs have, such as development of new propulsion technologies, algorithm and E/E architecture development, software integration and other service areas around smart and connected mobility
- Aspirants possess strong capabilities in specific technology areas and value chain elements, however, their global presence and ability to serve projects with wider scopes is limited. They are making focused investments for enhancing their solutions portfolio, improving service enablement capabilities, and expanding their footprint and client-base to enter the Major Contenders segment

# This study offers three distinct chapters providing a deep dive into key aspects of the automotive engineering services market; below are three charts to illustrate the depth of the report

ACES Automotive Engineering Services PEAK Matrix® Assessment 2021<sup>1,2</sup>



Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation and investments	Delivery footprint	Overall
Service provider 1	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 2	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 3	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 4	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 5	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 6	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 7	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 8	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service provider 9	☐	☐	☐	☐	☐	☐	☐	☐	☐

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ☐ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation and investments	Delivery footprint	Overall
☐	☐	☐	☐	☐	☐	☐	☐	☐

**Strengths**

- Well-balanced mix of client portfolio across small, mid-sized, and large enterprises, spanning all key geographies
- Strong partnership-led engagement with top clients, offering the best-in-class services in terms of delivery, time-to-market, and competitively priced offerings

**Limitations**

- Needs to lay greater focus on infrastructure investments such as labs and CoEs (in domains such as e-mobility and telematics)
- Improve services play in domains such as infotainment & connectivity, ADAS, as well as presence across value chain segments

1 Assessments for Alten, Akka Technologies, AVL, Bertrandt, FEV, IAV, Sasken, and Semcon exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interaction with buyers.  
 2 Assessment of Capgemini is inclusive of Altran (part of Capgemini) and reflects their joint capabilities and market impact.

Source: Everest Group (2021).

# Research calendar

## Engineering services

■ Published
 ■ Planned
 ■ Current release

### Flagship engineering services reports

	Release date
Reaching New Frontiers in Experience-centricity and Resilience: Software Product Engineering Services PEAK Matrix® Assessment 2021	March 2021
Semiconductor Engineering Services PEAK Matrix® Assessment 2021: Enabling the Hyper-connected Intelligent World	March 2021
A Transformational Leap in Cyber-physical Convergence – Industry 4.0 State of the Market Report 2021	April 2021
<b>Exploring the Future of Mobility: Autonomous, Connected, Electric, and Shared (ACES) Mobility Automotive Engineering Services PEAK Matrix® Assessment 2021</b>	<b>August 2021</b>
State of the Market – Software Product Engineering Services PEAK Matrix® Assessment 2021	Q3 2021
5G Engineering Services PEAK Matrix® Assessment 2021	Q3 2021
Medical Devices IoT Services PEAK Matrix® Assessment 2021	Q4 2021
Digital Engineering Services PEAK Matrix® Assessment 2021	Q4 2021

### Thematic engineering services reports

	Release date
Digital Twins and their Adoption Across Industries	February 2021
The Role of Global Business Service (GBS) Organizations in the Automotive Industry: What Lies Ahead?	March 2021
Engineering Services Enterprise Pulse: Are Engineering Enterprises Truly Happy with Their Service Providers?	April 2021
Engineering Services Top 50	June 2021
Trends in the Top 200 Engineering Research & Development (ER&D) Enterprises	Q3 2021
Extended Reality and its Applications Across Industries	Q3 2021
Engineering Services Enterprise Sourcing Handbook	Q3 2021
Trailblazers: Cloud Engineering Service Providers	Q4 2021

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