

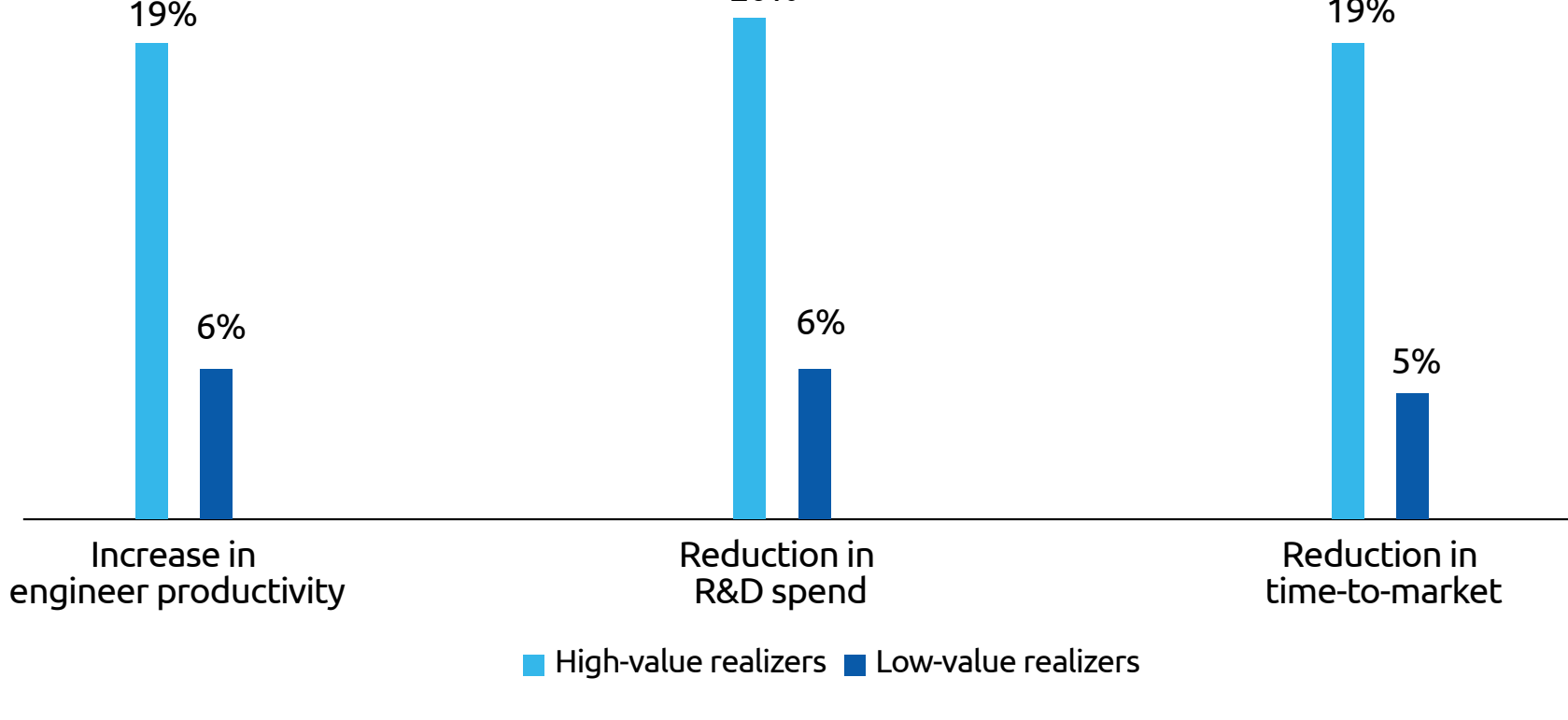
Rewiring automotive product development

How organizations can pull ahead in the AI race

Make it real.

AI is already paying, with high-value realizers achieving 2-3x greater benefits

Reported improvement across key outcomes



Note: High-value realizers are those that report measurable gains of more than 5% across all five selected benefit areas and an average benefit magnitude of at least 15% across those benefits¹. In contrast, low-value realizers report an average benefit magnitude below 7%.

Value-led AI strategy, stronger governance and trusted data foundations distinguish high-value realizers

66% high-value realizers define clear business cases and cost-value models for agentic AI vs. 32% of low-value realizers

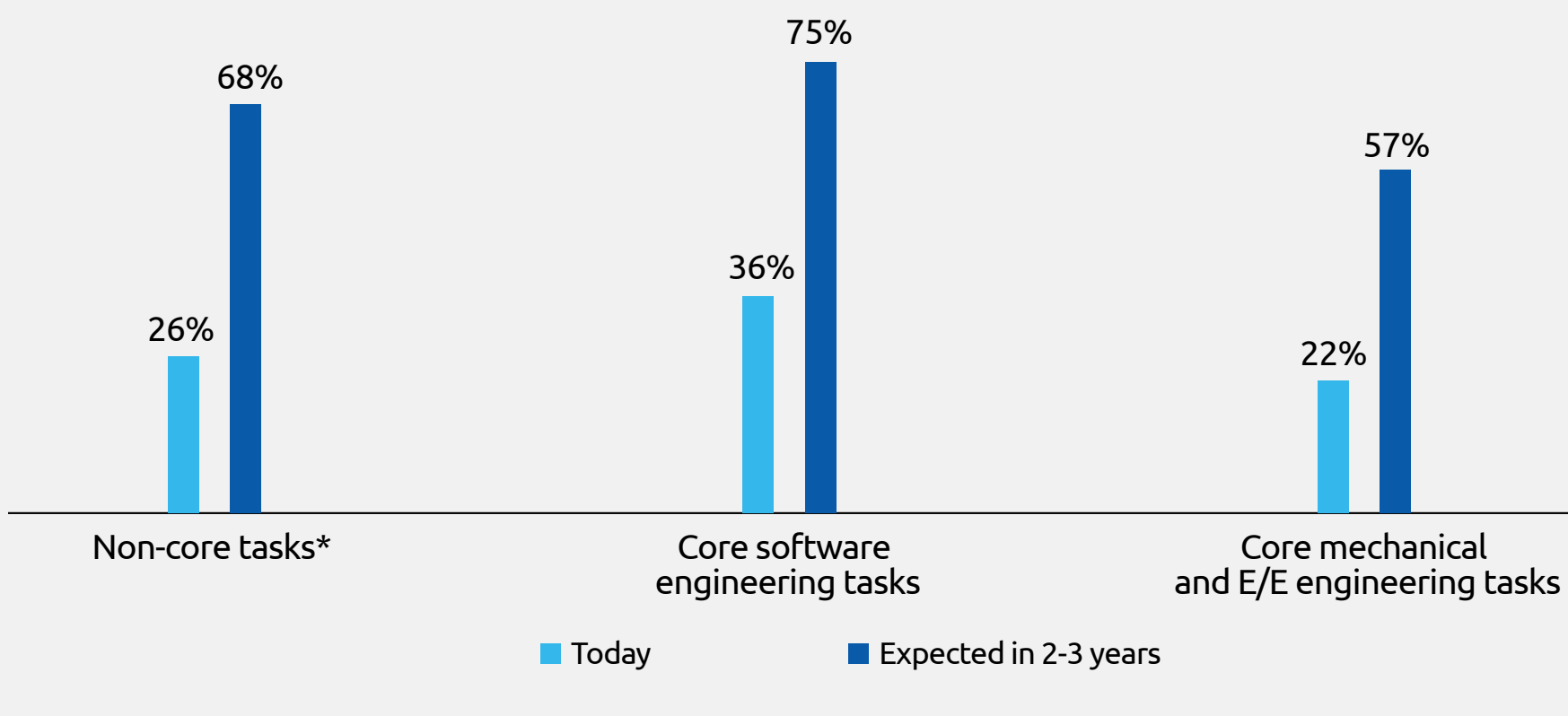
74% high-value realizers have an advanced AI strategy and roadmap vs. 49% of low-value realizers

¹Benefit ranges were converted to numeric values using band midpoints: less than 5% = 2.5%; 5–10% = 7.5%; 11–20% = 15.5%; and more than 20% = 25%. "No measurable impact" responses were coded as 0%, while "difficult to isolate" responses and unanswered items were excluded from the average.

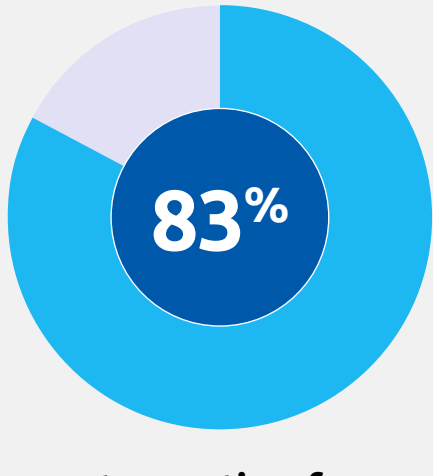
Agentic AI is set to expand across engineering, becoming the connective tissue across workflows and functions

Organizations' use of agentic AI will increase by more than 2x across domains in the next 2-3 years

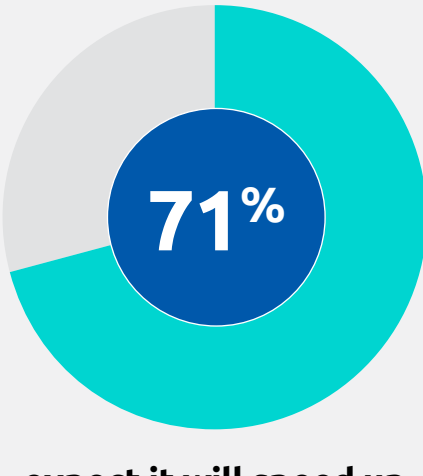
Percentage of organizations that use agentic AI



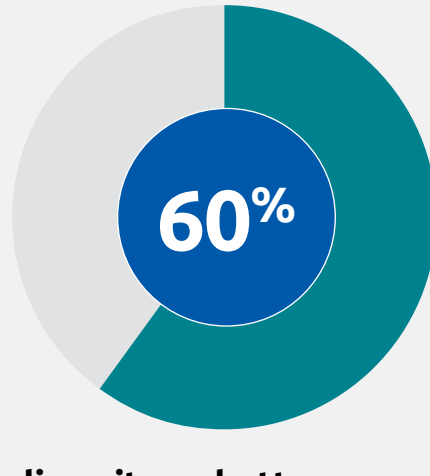
Percentage of organizations that use agentic AI



expect more time for core engineering



expect it will speed up decisions

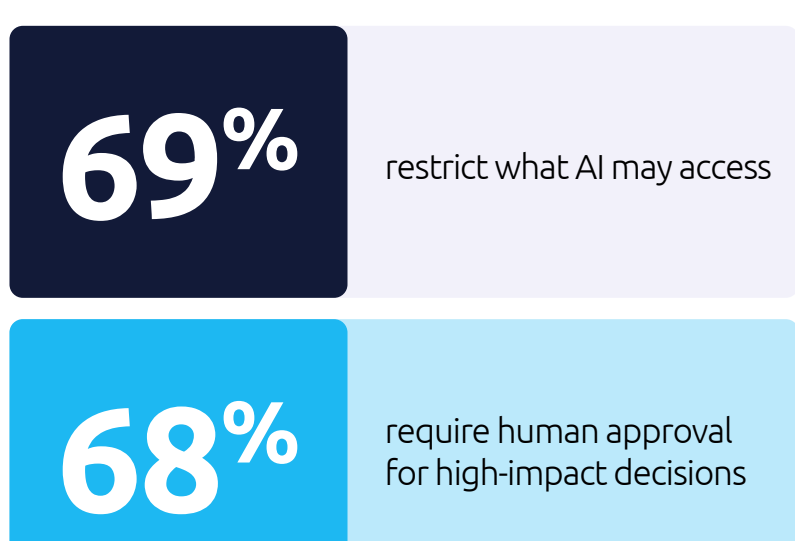


believe it can better manage coordination across systems, software, and hardware

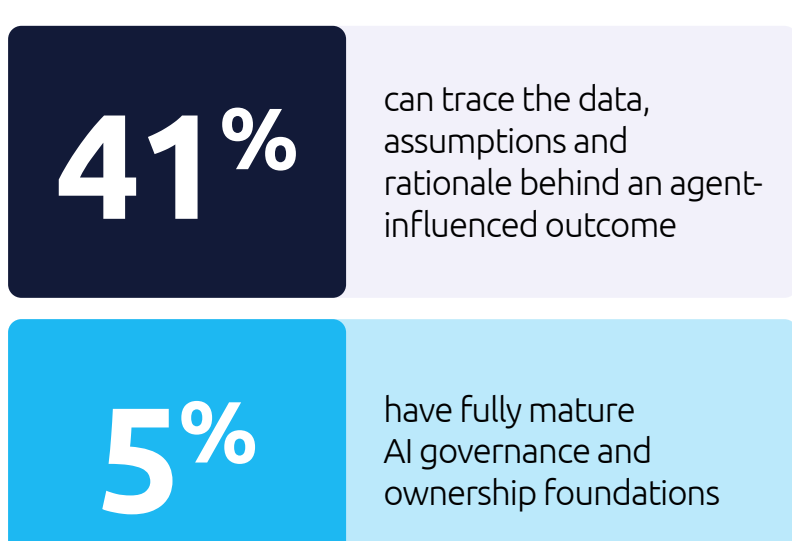
*Non-core engineering tasks are supporting activities such as documentation, reporting, data preparation, information gathering, coordination, and workflow management that enable product development but do not directly create engineering outputs or product differentiation.

Controls are widespread, but evidence and decision rights lag

Most organizations restrict what AI may touch



But few can show what it did and why



Traceable evidence and clear accountability will define the limits of autonomy

Vehicles receive content. They do not yet receive behavior.

81% collect vehicle telemetry data and 72% capture over-the-air update signals, but insights seldom translate into existing fleet updates

What reaches the vehicle



Growing ecosystem dependencies and low maturity, giving sovereignty a greater significance

Only 40% believe ecosystem partners accelerate engineering workflows without creating dependency risks.

Only 30% have progressed to co-development models with shared KPIs and workflows

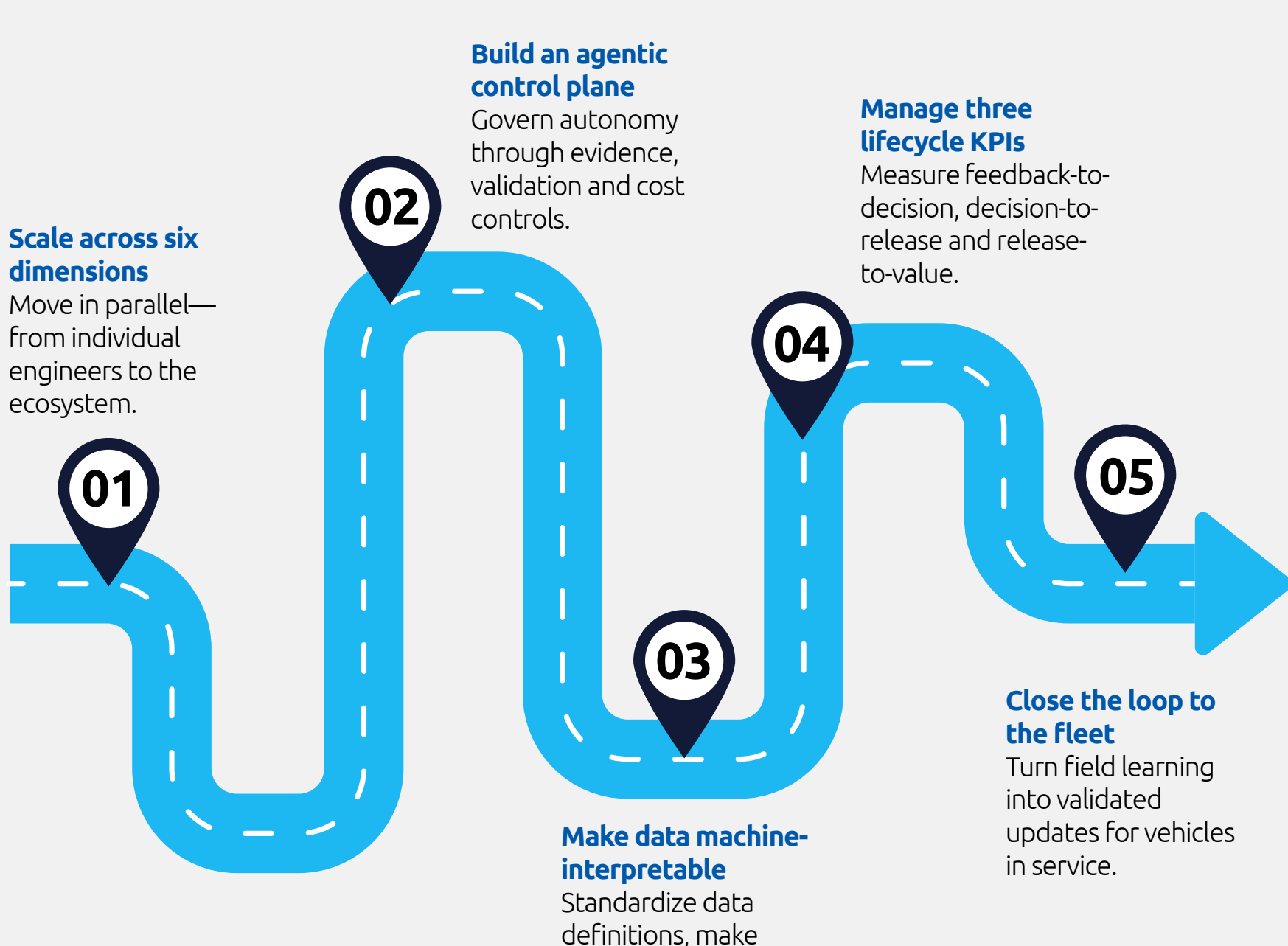
Nearly two-thirds are seeking greater internal control over data, models, or platforms

53% are reducing reliance on non-domestic or single-region providers.

Scaling AI increases the importance of partner accountability and update control

Capgemini Research Institute, AI in automotive product development, July 2026, N=800 senior executives from the automotive industry, comprising 400 automotive OEMs, 160 Tier-1 suppliers, and 240 technology providers.

Five actions to turn AI adoption into engineering value for automotive organizations



Strong engineering practices, reliable data, and strong governance enable AI to deliver measurable impact

Source: Capgemini Research Institute analysis.

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