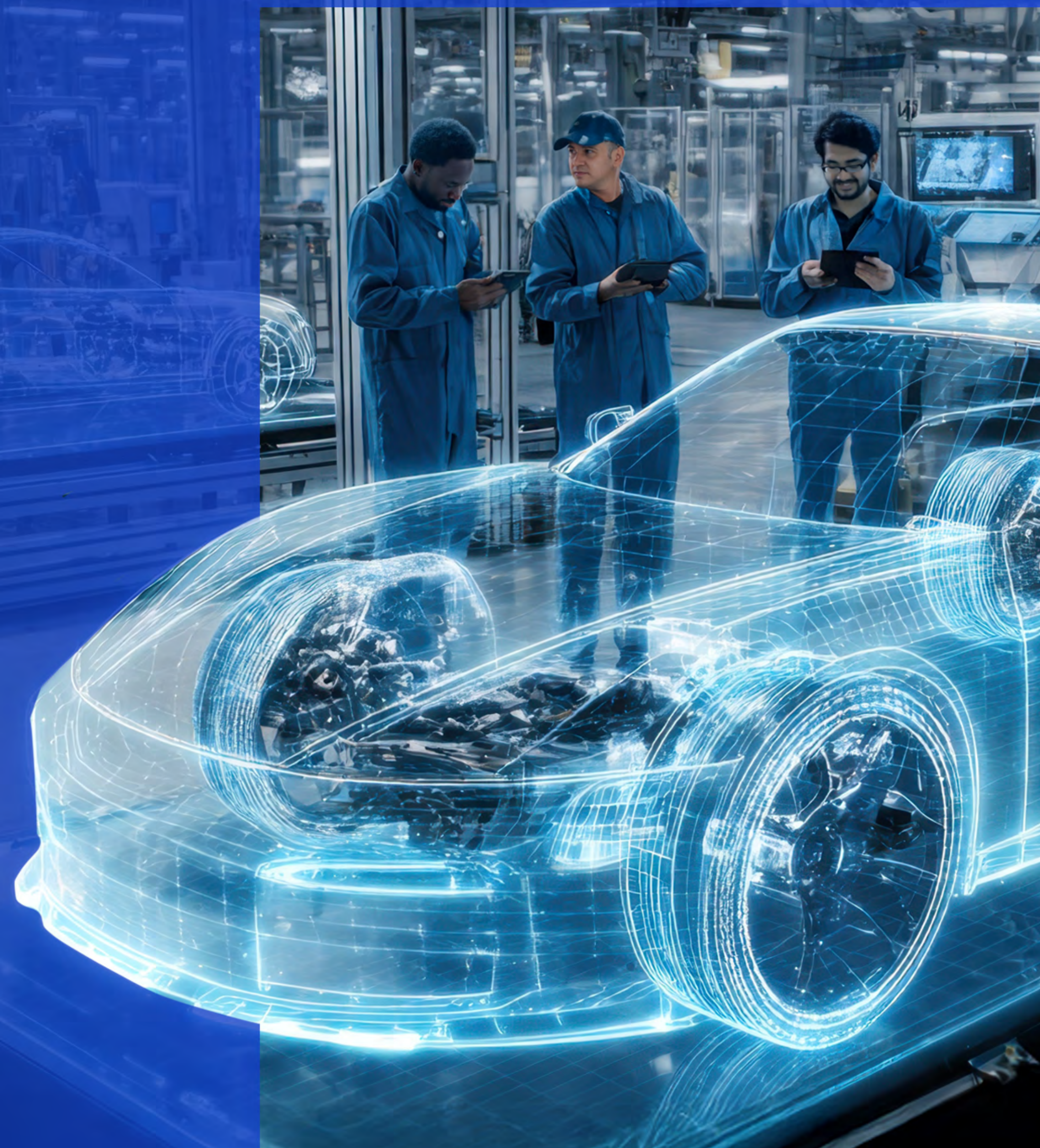




KPMG Global tech report 2026: Automotive

Part one: The technological landscape —
understanding today's industry realities





Foreword

The global automotive industry stands at a crossroads. The Intelligence Age is no longer a distant concept; it is reshaping products, value chains, and competitive advantage in real time. AI, advanced software architectures and next-generation computing paradigms are transforming how vehicles are conceived, engineered and experienced. Meanwhile, geopolitical uncertainty and supply chain volatility are heightening strategic and operational pressures. In this environment, separating signals from noise is critical.

This KPMG study draws on insights from leaders across the global automotive ecosystem, cutting through speculation to provide an evidence-based view of where the industry truly stands.

The findings are based on responses from senior executives across five key sub-segments: OEMs, commercial vehicle manufacturers (truck manufacturers), tier-1 suppliers, new technology component providers and mobility solution providers.

In our recent 25th Global Automotive Executive Survey, technology was identified as one of the five core transformation priorities shaping the future of the industry. Building on this foundation, the present study provides a deeper perspective on the “Manage Technology” dimension — exploring how companies are translating strategic intent into execution.

Organizations are now moving beyond fragmented experimentation and working to embed AI and automation at scale across operations, engineering and customer lifecycles. However, progress remains uneven.

Technical debt, talent shortages and legacy processes continue to slow transformation, reflecting challenges seen across the broader technology landscape.

Despite these constraints, optimism remains strong. Automotive executives believe they can unlock higher levels of technological and operational maturity within the next few years, even though few have reached that threshold today. Realizing this ambition will require adaptive strategies, disciplined execution and a commitment to developing the workforce alongside technology.

As we look ahead, one question frames this report: **Can the industry withstand the disruption ahead and turn it into momentum?** We believe the answer lies in rejecting hype, grounding decisions in data and pursuing bold technological ambition with operational realism.

We welcome the opportunity to discuss these findings and their implications with you.



Dr. Andreas Ries

Global Head of Automotive
KPMG International

Key findings

Part one

The technological landscape — Understanding today’s industry realities

The automotive industry enters the Intelligence Age with strong strategic conviction but continues to struggle with legacy friction, uneven readiness and widening capability demands. Leaders see technology as central to competitiveness yet acknowledge the operational barriers that slow execution.

Ability to take on more risks on emerging technologies to stay relevant in our industry



Part two

Meeting the challenge of the Intelligent Age

Technological maturity is advancing unevenly across segments, with each cluster scaling the capabilities most aligned with its operational model. Significant acceleration is expected over the next year even though scaling advanced technologies remains highly complex.

Changes to maturity level fully scaled for AI and automation (today versus in 12 months from now)



Focus and ROI of tech investments

Investment strategies focus on high-value domains such as AI, cybersecurity, modern delivery and digital twins. While organizations consistently realize value from technology, frequent trade-offs reveal persistent execution challenges.

Tracking performance of tech initiatives against business plans and projections



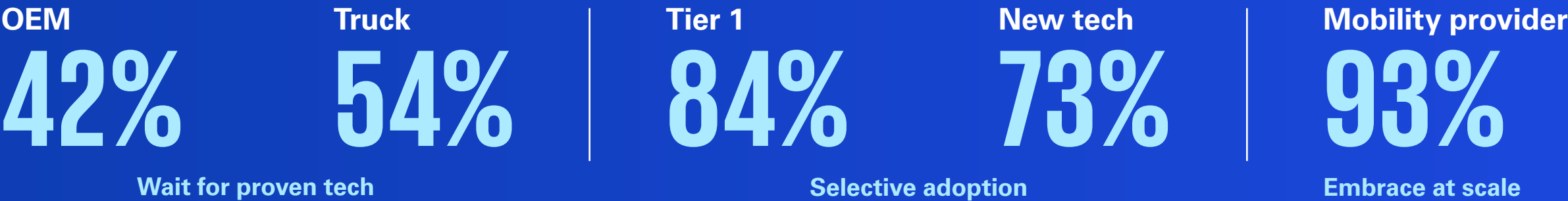
Key findings

Part three

Building adaptive strategies amid continual disruption

Tech governance remains largely centralized to enforce architectural consistency and control risk, while selective decentralization enables speed and business proximity. Organizations increasingly rely on structured experimentation to manage uncertainty around breakthrough technologies.

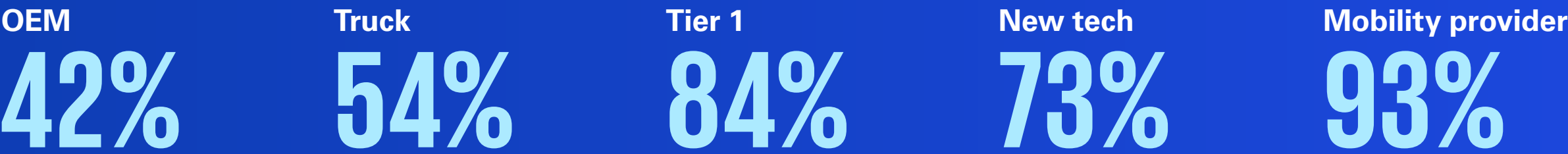
Preferred adoption strategy of breakthrough technology



The foundation of the next wave

AI adoption is accelerating sharply across all segments, complemented by a shift toward digital and automated workforce capacity. Over the next 12 months, organizations expect significant progress toward scaled AI deployments.

Own IT function as a leader in AI implementation





Actionable insights

Move from pilots to platform-scale execution

KPMG research shows that many organizations create value from isolated AI and data use cases, but scaling remains constrained by legacy estates, fragmented ownership and inconsistent data contracts (for example, high “hitting blocks” rates in AI, data and cybersecurity). Leaders must standardize architectures, enforce “golden paths” and industrialize Machine Learning Operations (MLOps) and data governance to make AI a repeatable capability rather than a collection of isolated wins.

Treat governance as a performance accelerator, not a constraint

Centralized control still dominates critical technology decisions, but it can become a bottleneck and a single point of failure when budgets tighten. Executives must rebalance governance for both control and speed, enabling decentralized innovation where safe, while reinforcing cybersecurity, responsible AI and software-update rigor.

Prioritize technologies with scalable ROI

Returns differ systematically across the ecosystem: tier 1s and mobility solution providers capture the highest returns through standardized digital capabilities and data-intensive architectures. At the same time, legacy-heavy players lag. Leaders should prioritize technologies that enable scalable economics — AI, simulation, digital twins and modern delivery — and sequence transformation where it boosts capital efficiency most.

Build a workforce model that scales with intelligence, not headcount

The shift toward digital labor (AI agents, automation, low-code) is evident across all segments. Executives must redesign operating models around hybrid digital-human capacity, upskilling teams for AI oversight, orchestration and model-driven operations to ensure talent becomes a multiplier, not a bottleneck.

The technological landscape — understanding today's industry realities

The automotive industry is navigating a period of profound and unprecedented transformation. Shifting customer expectations, accelerating innovation cycles and intensifying competitive pressures are having a critical impact. Also in play is sweeping technological change — from electrified and software-defined vehicle architectures to new propulsion systems, digital platforms and increasingly intelligent automated capabilities.

Against this backdrop of structural disruption, industry leaders are signaling a notable shift in sentiment. They express strong optimism about growth and view technology as a central driver of future competitiveness. Their confidence is reinforced by advancements in digital capabilities, software-defined architecture and increasingly data-driven business models — signals of an industry poised to innovate and expand. Yet the data also reveals a sector caught between momentum and legacy.

While organizations are eager to modernize, the rapid and accelerating pace of technological change creates operational strain. Many companies struggle to keep systems up to date and realize the full value of their digital investments.

Figure 1: Strategic assessment of technological readiness and future ambition
How organizations across all sub-sectors position themselves across key technology and transformation statements:

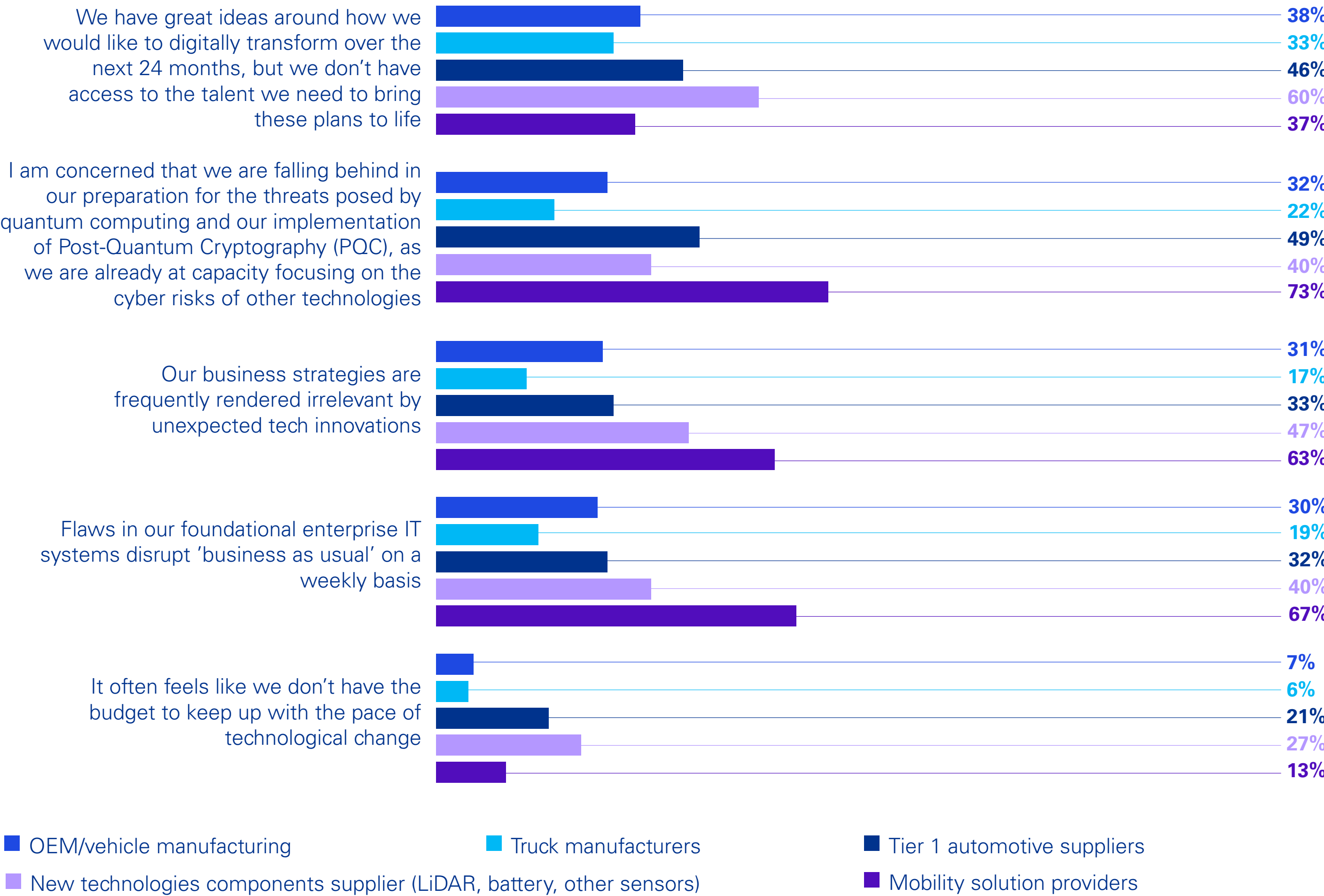


The tension between modernization goals and inherited structures defines the current landscape, shaping both opportunities for innovation and operational challenges automotive companies must address.

Across the automotive ecosystem, there is a striking alignment on the strategic role of next-generation technologies. Companies broadly agree that investing in emerging capabilities today is not optional but foundational to future competitiveness. This shared conviction also extends to the belief that strong technology partnerships and robust data-driven decision frameworks are essential for navigating the tension between short-term performance pressures and long-term innovation agendas.

Yet beneath this alignment, subtle but meaningful points of divergence emerge. While most organizations reject the idea that financial planning consistently lags behind technological change, there are pockets of uncertainty around readiness for post-quantum security and concerns about keeping pace with accelerated investment cycles. These mixed signals suggest that while strategic intent is unified, confidence in operational execution varies — revealing areas where risk perception and preparedness are unevenly distributed. The adjacent graphic illustrates how these dynamics manifest across individual sub-sectors.

Figure 2: Strategic conviction in advanced technologies meets persistent capacity constraints
Respondents largely agree on the strategic importance of advanced technologies, while concerns remain around capacity constraints.





Across all five segments, the data shows a shared strategic conviction in the long-term importance of advanced technologies (compare Figure 1), but the nature of the constraints differs fundamentally by position in the value chain.

OEMs exhibit strong belief in next-generation technologies while simultaneously signaling the drag of legacy complexity. Their constraint is less about direction and more about the architectural burden that slows absorption of innovation.

Truck manufacturers display a similar conviction — but with a sharper sensitivity to risk, reflecting the operational and regulatory pressures that make rapid automation and responsible AI adoption inherently more fragile.

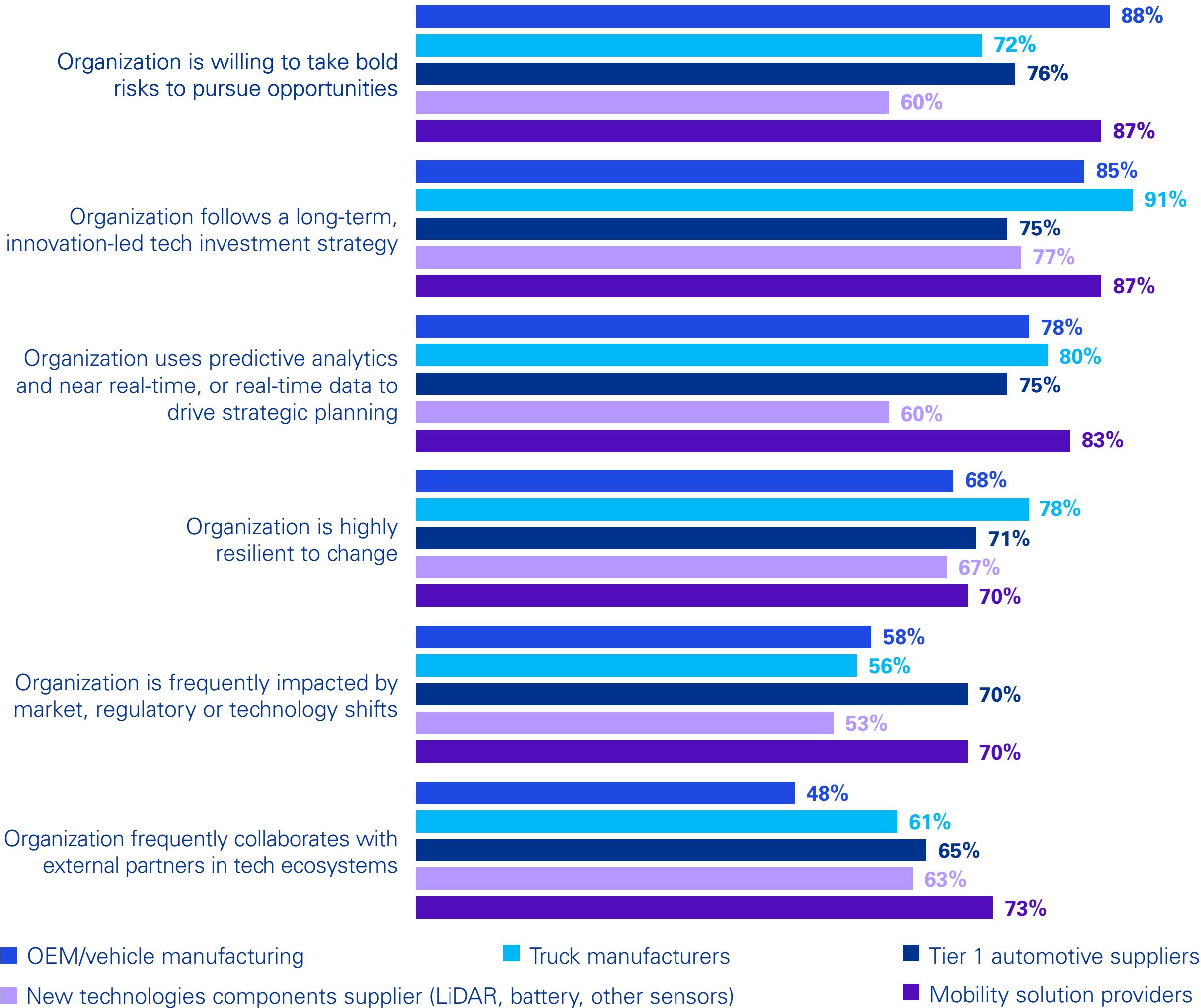
Tier 1 suppliers are ready — and eager — to modernize now. They see technology-led speed and flexibility as essential to surviving rapid shifts in OEM strategies and an increasingly regionalized value chain. In many cases, they are more agile and better positioned to move than their OEM customers, yet their momentum is throttled by OEM investment timing. The result is a widening gap between those prepared to lead change and the structures that still dictate when change is allowed to happen.

New technology and component suppliers, by contrast, operate at the forefront of disruption. Their concern is not legacy but integration speed and staying ahead of rapid innovation shifts that can redefine competitive advantage overnight.

Mobility providers stand apart with a readiness profile that leans forward. Their constraints center on interoperability rather than capability.

The adjacent results show how this uneven landscape translates into diverse levels of structural robustness and adaptiveness across the value chain.

Figure 3: Organizations position themselves as generally resilient and adaptive
Most respondents cluster in the upper ranges of the resilience and adaptability scales, with few self-identifying at extreme ends.





Automotive companies see themselves as structurally resilient and strategically forward-leaning. Most rate themselves in the top ranges of adaptability and innovation readiness, signaling confidence in their ability to absorb shocks, pivot quickly and seize emerging opportunities. High scores on innovation-led investment strategies and predictive analytics use suggest that resilience is increasingly tied to data-driven steering, not just traditional operational robustness. At the same time, resilience varies across segments. Lower but still meaningful scores on exposure to market, technological, and regulatory shifts indicate that a company’s experience of resilience depends on risk exposure, governance depth and operational cadence.

OEMs present a profile of structured resilience: they score high on analytics usage, tech-led investment strategy and change readiness, reflecting the governance discipline and deep operational buffers typical of large incumbents. Their moderate scores on risk impact and security rigidity indicate a balance between innovation and control, aligning with their need to stabilize multilayered product and software architectures.

Truck manufacturers show a more conservative, risk-sensitive form of resilience. Their willingness to take bold risks is lower, and regulatory or market shifts have a more visible impact. This reflects their asset-intensive context, where product cycles are long, reliability is paramount and innovation must coexist with compliance-heavy operations.

Tier 1 suppliers increasingly view innovation as a source of competitive advantage, not just resilience. They are pursuing analytics-driven and technology-led strategies to create speed, consistency and leverage across multiple OEM relationships. While exposure to regulatory and technology shifts remains real, tier 1s are actively using their cross-OEM footprint to absorb volatility, standardize capabilities and turn complexity into advantage.

New technology component suppliers appear highly adaptive and strongly innovation-oriented, with above-average willingness to take bold risks.

Mobility solution providers consistently show the strongest confidence across categories: bold risk-taking, heavy analytics reliance, high change readiness and the highest level of external collaboration. Their resilience is rooted less in operational redundancy and more in speed, iteration, and digital maturity.

“**Across the industry, we see companies sequencing their moves with far more discipline — strengthening data resilience, sovereignty and local capability first, before unlocking targeted growth under tighter governance and financial control.**”

Dr. Andreas Ries
Global Head of Automotive
KPMG International



Industry myths vs. what the data really shows

Myth 1: Strategy is the bottleneck — the industry lacks conviction on next-generation technologies.

Reality: Conviction about tech’s relevance is not an issue but a matter of universal common consensus. Over 90 percent of companies see emerging technologies as investment-critical across all segments. The real constraint is execution capacity: capital intensity, talent, and integration complexity — not strategic alignment.

Myth 2: Automotive remains structurally risk-averse and slow to adapt.

Reality: The industry is far more dynamic than perceived. Resilience and adaptability score consistently high, but manifest differently: OEMs and truck manufacturers apply disciplined, governance-led adaptation, while mobility providers and tech entrants operate with speed, iteration, and risk tolerance. The divide is not between slow and fast — but between control-driven and velocity-driven operating models.

Myth 3: Geopolitics and macro volatility will derail technological progress.

Reality: Volatility is not slowing transformation — it is accelerating it. Rather than pausing investment, companies are doubling down on digital and software foundations, strengthening data capabilities and increasing strategic independence. Uncertainty is acting as a catalyst for de-risking through technology, not retreat.

While internal dynamics share how organizations build resilience, the industry is equally influenced by pressure originating outside the enterprise. Geopolitical volatility, shifting regulatory frameworks and unpredictable market disruptions are intensifying the need for strategic clarity and technological robustness. Against this backdrop, companies are refining their technology agendas to navigate an environment where external shocks increasingly dictate the pace and direction of transformation.

The dominant pattern on geopolitical and macroeconomic uncertainty is a shift toward stronger data foundations, domestic capability anchoring, and controlled exposure to external risks.

OEMs and truck manufacturers concentrate on reinforcing data infrastructure, improving the reliability of data flows and securing key talent onshore, supported by deeper sovereignty checks across partner ecosystems.

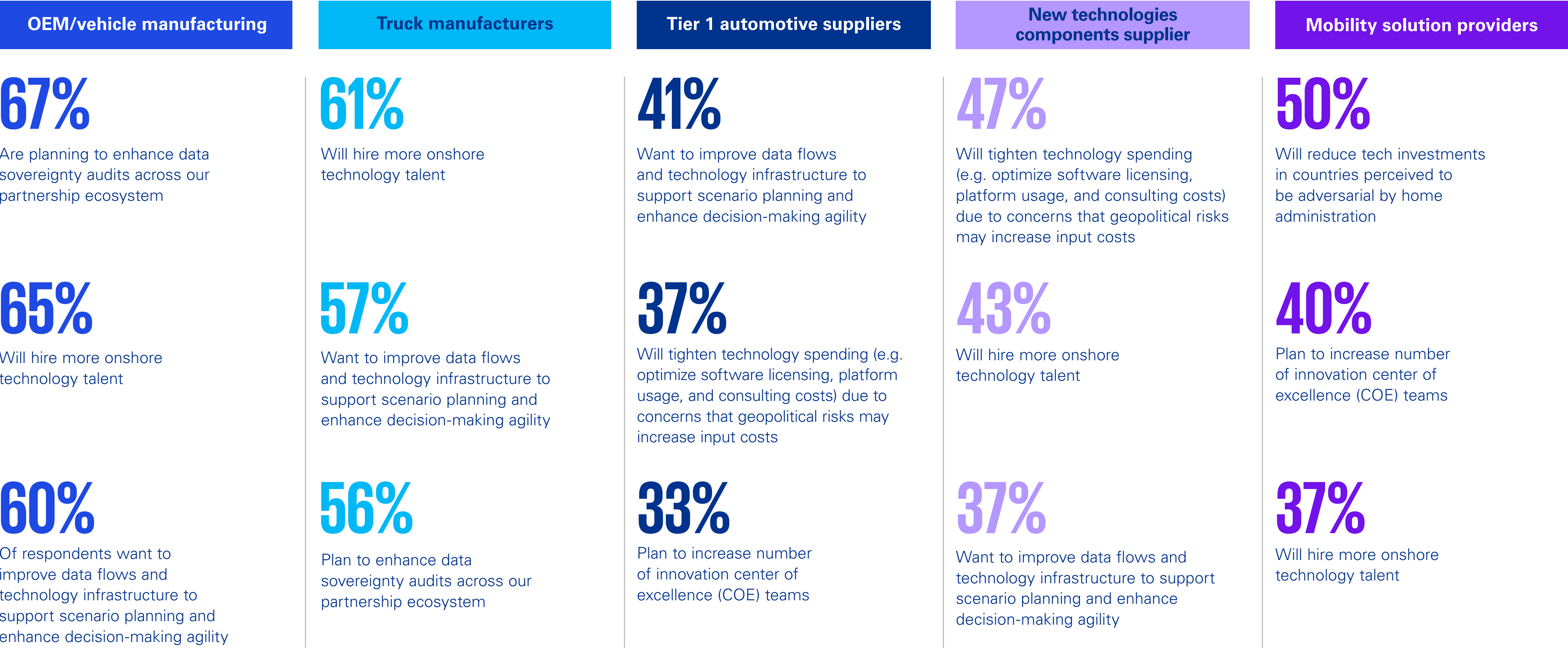
Tier 1 suppliers are tightening capital discipline and prioritizing investments with clear returns and margin impact. Diversification is increasingly executed through regionalization — spreading production, technology, and customer exposure across regions to reduce concentration risk, protect profitability and create more resilient, locally optimized profit pools.

New technology and component suppliers adopt the most-defensive stance, emphasizing cost control and domestic skill consolidation to mitigate heightened exposure to market and supply chain shocks.

Mobility providers distance themselves from geopolitically sensitive markets while expanding innovation hubs to maintain agility.



Figure 4: Technology responses to geopolitical and macroeconomic uncertainty
Planned actions focus on data resilience, talent localization and selective de-risking of technology and supply chains.





Next steps to success

OEMs

OEMs already generate early business value from multiple active AI use cases, but require systematic scaling across engineering, operations and customer domains. Their biggest barrier is not intent or funding — but coherence across legacy estates, fragmented ownership and weak data contracts. Centralized governance preserves architectural integrity but magnifies the impact of budget cuts on innovation velocity. Next steps for progress:

- Rationalize platforms and enforce domain data contracts (golden paths, reusable data products) to decouple legacy and standardize scale.
- Embed Security-by-Design into Software Defined Vehicles (SDV) stacks (Software Bill of Materials (SBOM), supplier attestations, zero-trust) so AI/software scale safely.
- Move AI from project to product (Machine Learning Operations (MLOps) pipelines, model registries, drift monitoring, responsible AI controls) with uniform KPIs.
- Create budget-shock playbooks (value-density portfolio, cut-resilient release trains) to protect critical scale programs.
- Industrialize collaboration templates (IP safeguards, integration blueprints) to overcome the governance and integration barriers highlighted in the collaboration findings.

Truck manufacturers

Trucks advance fastest in operations-adjacent capabilities (digital twins/simulation), while AI, data and cyber scale more slowly due to safety-critical workflows and regulatory pressure. Over the next 12 months, the segment expects coordinated rollouts that shift beyond pilots and begin delivering measurable impact. Next steps for progress:

- Standardize cyber controls and responsible AI frameworks suited to safety-critical contexts.
- Establish canonical data models for fleet/aftermarket, and enforce quality and lineage to reduce scaling friction.
- Build a Simulation Factory (reusable models, synthetic data) to compress validation cycles across programs.
- Use Pilot-to-Plant playbooks (OT/IT integration, training, change management) to industrialize beyond PoCs.
- Stand up an ESG-execution PMO (measurement chains, supplier compliance) to mitigate the ESG-delay risk intensified by budget constraints.

Next steps to success

Tier 1 automotive suppliers

Tier 1s are technical scale leaders in AI, data, cyber, and simulation, with the highest capital efficiency (distinct ROI concentration in the 125–175 percent band). The strategic challenge is less capability and more direction — reducing dependence on OEM roadmaps while redirecting technology scale toward diversified growth.

- Reposition XaaS as a diversification engine, professionalizing pricing, SLAs, telemetry, and cost to serve so services can scale profitably across non-automotive and adjacent end markets — not just OEM programs.
- Shift portfolio mix from volume linked components to solution-led platforms, enabling revenue growth per program as light vehicle unit growth slows or stagnates.
- Pursue targeted M&A and partnerships to acquire software, data, and platform capabilities that accelerate entry into industrial, mobility services, energy, and China adjacent ecosystems, rather than building organically at OEM speed.
- Design for regionalization and China OEM expansion, standardizing modular architectures, integration kits, and compliance-by-design to support rapid localization and participation in fast-scaling Chinese OEM platforms globally.
- Industrialize reusable AI, data, and simulation assets as enterprise products — allowing tier 1s to compound returns across regions, customers, and industries while reducing reliance on any single OEM investment cycle.
- Automate regulatory, software quality, and AI governance to lower friction in new markets, shorten commercialization cycles, and make compliance a growth enabler rather than a cost drag.

New technology component suppliers

Frontier-innovation velocity is high, but scaling lags where data plumbing, MLOps and service GTM are immature. ROI is volatile. Success depends on integration into OEM/tier-1 architectures. Collaboration is often constrained by misaligned incentives and lack of clear partnership strategies. Next steps for progress:

- Build an enterprise-grade data backbone (contracts, quality Service Level Objectives (SLO), lineage) and harden MLOps to move from prototype to reliable scale.
- Publish integration playbooks (SDKs, reference architectures, security assurance packages) tailored to OEM/Tier-1 needs.
- Clarify services — GTM (packaging, metering, partner incentives) to stabilize ROI and accelerate adoption.
- Differentiate with post-quantum and cyber readiness to pass stringent supplier screens early.
- Use proof-of-value cascades (from pilot ROI to series integration milestones) to de-risk funding and customer commitments.

Mobility solution providers

Mobility providers are furthest along, demonstrating strong AI/data maturity, decentralized innovation and disproportionately strong ROI. The main exposures are cyber risk, workforce transition and partner interoperability across the legacy-heavy ecosystem. Next steps for progress:

- Intensify security hardening at scale (zero-trust, continuous posture management, SBOM, supplier attestations).
- Drive interoperability (open APIs, data contracts, edge-AI operations) to integrate with OEM partners.
- Operationalize responsible AI guardrails (evaluation, monitoring, incident playbooks) to match scaling speed.
- Execute a workforce transition plan (upskilling, role redesign, modern KPIs) aligned with digital-workforce growth.
- Secure scale economics (multitenancy telemetry, cost-to-serve control, Site Reliability Engineering (SRE) metrics) for sustainable expansion.



Turning disruption into momentum for a new era of opportunity

The results of our analysis help to provide a concise answer to the question posed at the outset of this report: ***Can the industry withstand the disruption ahead and turn it into momentum?***

The answer? Yes! This dynamic industry is capable of turning disruption into momentum. The foundations are already visible across every sub-segment. Across the ecosystem, leaders demonstrate clear strategic conviction, rising AI maturity expectations and a willingness to expand digital capabilities — even as legacy friction, coordination gaps and uneven readiness remain.

Our study shows that automotive organizations consistently generate value from technology investments, despite navigating trade-offs in security, scalability and data standardization. This is not the profile of an industry overwhelmed by disruption — it is the profile of an ambitious industry that is decisively accelerating its climb up the learning curve.

What truly stands out is the emergence of repeatable success patterns. Segments that productize platforms, professionalize governance, enforce modern data contracts and scale AI through secure operating models already achieve disproportionately strong ROI and faster cycle times. Mobility providers and tier-1 suppliers exemplify how disciplined execution translates into measurable advantage. Their trajectories illustrate that the path forward is less about betting on more technology — and far more about industrializing how technology is delivered, governed and scaled.

The opportunity for the industry is indeed clear and within reach: turn strategic intent into operating-model excellence. This requires doubling down on secure data backbones, reusable architectural patterns, responsible AI guardrails and digital workforce capacity that scales linearly — all while costs do not. It means shifting from pilot proliferation to platform-centric execution, moving from fragmented ownership to coherent, cross-domain orchestration and adopting iterative, model-driven operations instead of sequential development.

What's next in the series

Part one is part of a broader analysis — we recommend exploring the remaining parts of the study to gain a more complete view of how the automotive industry is evolving in the Intelligence Age.

In part two, discover how automotive organizations are progressing — often unevenly — in scaling AI, data and automation. While many are moving beyond pilot programs, real complexity remains, even as expectations for rapid gains in technological maturity continue to rise. You'll also see how leading companies are developing adaptive strategies to manage continual disruption, striking a balance between centralized control and agile experimentation to navigate risk and unlock innovation.

In part three, take a closer look at how industry leaders are reshaping their operating models to stay resilient — recalibrating decision-making, shifting investments under pressure and embracing structured experimentation in response to constant change. You'll also gain insight into the next wave of transformation, as AI-driven capabilities, digital workforces and emerging technologies redefine scale, reshape organizations and set the pace for future competitiveness.

These additional reports will be available on our website in the coming months — stay tuned as we continue to share deeper insights from the full study.



How KPMG can help

KPMG helps automotive organizations translate advanced technology into measurable, enterprise-wide value as the industry transitions to software-defined, data-driven operating models.

KPMG professionals support automotive leaders in moving beyond fragmented pilots to **platform-scale execution**, prioritizing proven use cases across engineering, manufacturing and the vehicle lifecycle — such as predictive maintenance, quality optimization, digital twins, AI-enabled engineering and resilient supply chains. We work with leadership teams to design **AI-enabled operating models**, modernize data and software architectures and establish value-measurement frameworks that link technology investment directly to performance, safety and ROI.

Trust, security and regulatory readiness are embedded from the outset. Through frameworks such as **KPMG Trusted AI**, KPMG professionals help automotive organizations manage cyber, regulatory and ethical risks — including CSMS, SUMS, software update governance and responsible AI controls — as adoption accelerates and technologies scale across increasingly complex ecosystems.

Through **KPMG Velocity**, our global transformation engine, we combine deep automotive expertise, technology accelerators and ecosystem partners to design, build and scale transformation at speed — helping organizations industrialize innovation while maintaining control, resilience and compliance.

<https://kpmg.com/xx/en/what-we-do/services/advisory/consulting/velocity.html>

Methodology

Survey respondents represented organizations with annual revenues above US\$1 billion and included a diverse group of technology leaders, such as Chief Data Officers, Chief Digital Officers, CIOs, CTOs, CISOs, Chief AI Officers, and others. The automotive industry perspective of the KPMG global tech report 2026 draws on the views of 258 technology leaders from 22 countries and territories from the automotive industry — OEMs (81), truck manufacturers (54), tier 1 automotive suppliers (63), new technologies component suppliers (30), mobility solution providers (30). NOTE: Some figures may not add up to 100 percent due to rounding.



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Andreas is the Global Head of Automotive at KPMG International and leads a network of over 8,250 professionals based in KPMG member firms in more than 30 countries and territories, who provide Audit, Assurance, Tax and Advisory services to the automotive industry. As a trusted advisor, Andreas helps automotive leaders, from the largest OEMs to tier 1 suppliers and mobility startups, to address their transformation challenges, utilizing KPMG professionals’ multidisciplinary experience, and enabling automotive companies to focus on their performance and regulatory considerations. With his deep experience of over 25 years in the automotive industry, Andreas understands the complex challenges the industry is facing.



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Global Automotive Executive
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Petra brings extensive experience across the automotive and industrial manufacturing sectors, with a strong focus on future-oriented transformation. As a co-author of multiple KPMG flagship studies, including the Global Automotive Executive Survey, she collaborates closely with leading futurists and industry experts to explore emerging trends such as AI, virtual reality, resilience, energy transition, and disinformation. Her work bridges foresight and strategy, helping clients anticipate disruption and shape resilience.



Leonard ‘Lenny’ LaRocca
Head of Automotive, Americas
KPMG in the US

Lenny has over 20 years of automotive experience and has led or been involved in some of the most important and transformational transactions in the industry. He has worked on hundreds of transactions for automotive corporate clients and private equity. His experience includes deep transaction experience in the automotive supply chain, OEMs, commercial vehicles, off-highway, aftermarket, and distribution. He has a significant amount of international experience leading numerous global complex transactions.



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