

Software beats batteries: Why Europe's carmakers are missing

MANAGEMENT SUMMARY & CORE TAKEAWAY

The Gartner 2026 Digital Automaker Index shows the top six – Tesla, NIO, Xiaomi, XPeng, Li Auto, Rivian – are software companies, while European legacy brands are absent. They fail on organisational culture and software capabilities. That is the platform lesson for every Swiss SME.

CONTEXT & EXECUTIVE RELEVANCE

The Gartner 2026 Digital Automaker Index (August 2026) evaluates carmakers across ten categories. Tesla leads with 82.7% (up from 79.3% in 2025), followed by NIO (73.1%), Xiaomi (69.2%), XPeng (57.7%), Li Auto (57.0%), and Rivian (55.5%). All six are software-driven, AI-focused, and deliver over-the-air updates.

China leads the regional average, the USA ranks second, and Europe lags far behind – VW and BMW rank far down according to Gartner. AI is a new pillar of the index in 2026; Tesla, Xiaomi, and XPeng lead in-house AI development.

CORE ACTION ITEMS

- 01 Centralised compute instead of distributed control units
- 02 Over-the-air updates at least monthly — introduced by Tesla in 2012 and now standard
- 03 AI integration in development and in the vehicle
- 04 Platform architecture for data monetisation

SWISS COMPLIANCE & ARCHITECTURE GUIDELINES

- ☑ Full compliance with revised Swiss Data Protection Act (revDSG).
- ☑ Zero vendor lock-in on closed proprietary models.
- ☑ Seamless integration into Abacus, Bexio and M365 ecosystems.

Non-Binding Process Analysis

Let us review in 20 minutes where AI agents create immediate measurable efficiency in your workflows.

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