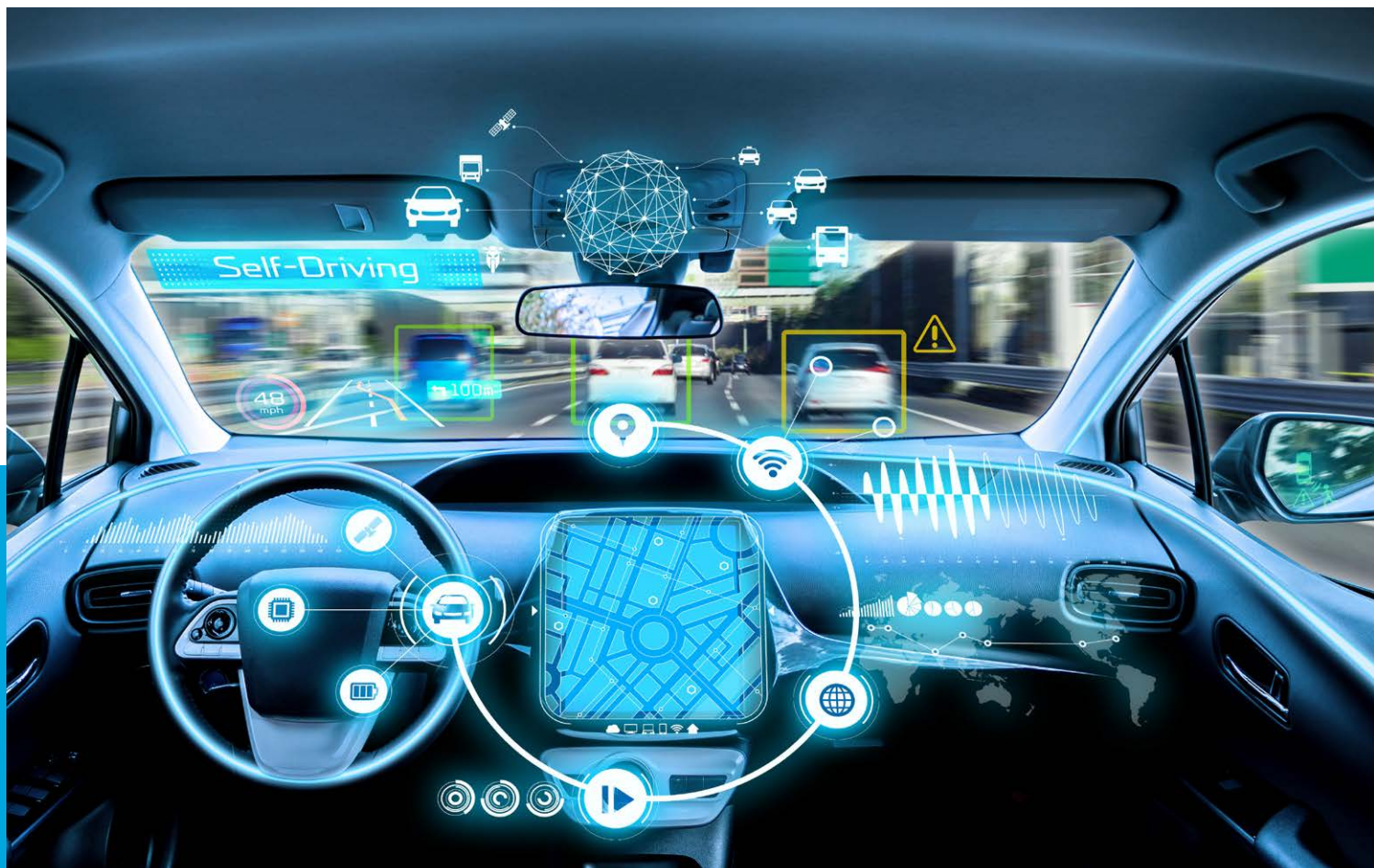


HELPED CLIENT IDENTIFY

USD 720 MN

REVENUE POTENTIAL IN AUTOMOTIVE
SOFTWARE SOLUTIONS



Client's Goals

Our client, a management consulting firm, wanted our insights to identify growth opportunities for automotive software. With the help of our engagement model, a series of problems were defined and solved. This, in turn, helped the client to identify revenue opportunities to stay ahead of the curve and competitors. Few of the key problems solved by us were-

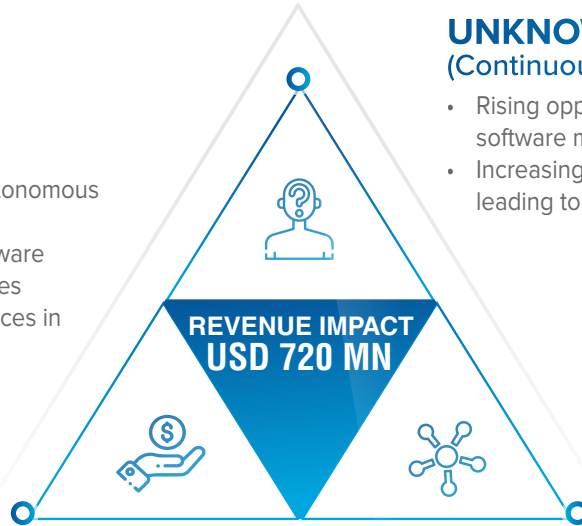
- Understanding of the forecast for interconnected markets using analyst hours. Actionable insights into different segments were also drawn.
- Understanding of assumptions considered for deriving the market intelligence for the automotive software sector.

Our Approach

Access to KnowledgeStore, our market intelligence platform, was provided for gaining deeper insight into market divergences. In addition, analyst hours were used to expand understanding of information collected majorly via secondary research as well as primary interviews with the industry experts. Our analysts team further helped in understanding the forecast of the overall market undertaken by carefully considering the assumptions associated with the use of the electronic control unit (ECU) and programs written in it. Also, all high-growth niche markets influencing the client's, client's clients', their clients' ecosystems were considered for identification of growth opportunities. Factors such as the number of ECUs used in each sub-application inside the vehicle were considered and forecasted with the data points gathered from secondary and primary research. Our client services team leveraged these insights to help strategizing revenue assessment plans for the client to achieve its goals and create revenue impact.

REVENUE SHIFT

- Increasing demand for autonomous and connected vehicles
- Emerging embedded software technologies in automobiles
- Increasing advanced services in connected cars



UNKNOWNNS (Continuous)

- Rising opportunities in Europe, the largest automotive software market
- Increasing concerns over vehicle & passenger safety leading to adoption of intelligent transportation systems

INTERCONNECTIONS (Y/YC/YCC)

- Connected services
- ADAS
- Infotainment
- Autonomous driving
- Powertrain management
- Vehicle diagnostic & telematics
- V2X



REVENUE SHIFTS IDENTIFIED

Our insights helped in the identification of cause of shifts in revenue sources in our client's, client's clients', and clients' clients' ecosystems. It was discovered through our engagement that with the gained traction of connected and autonomous vehicle technologies, the automotive embedded software has become a key area for innovation. Also, the increasing number of advanced services provided in connected cars can be attributed to the growth of automotive software for connected services.



INTERCONNECTIONS

The smart mobility incorporating advanced technologies and services such as connected services, ADAS, infotainment, autonomous driving, powertrain management, vehicle diagnostic & telematics, and V2X, among others were assessed as a part of our engagement model. Its influence on the future trajectory of the client was highlighted for finding blindspots.



UNKNOWNNS IDENTIFIED

Client services were used to draw insights into interconnected ecosystems and causes of revenue shifts to identify unknownns. Europe is the largest automotive software market for connected services. The increasing concerns over vehicle & passenger safety have led to the adoption of intelligent transportation systems in Europe.

Revenue Impact

Our engagement helped the client in targeting innovative areas and regions of primary importance. From a commercial perspective, our insights enabled them to build a strong relationship with their client. The client was able to cater to the potential revenue of about USD 720 million by the year 2030. Therefore, we were successful in impacting the revenue of not only our client but its client as well.

USD 720 | BY THE YEAR
MILLION | 2030

