OEM strategy and competitive benchmarking
for automotive software market

About the client

Our client is a leading global provider of embedded and connected software products and services for the automotive industry. With a strong market presence, the company's software empowers over 5 billion devices, delivering flexible and innovative solutions across aspects including car infrastructure software, connectivity, security, automated driving, and user experience.

Founded in
1988

Assets
USD 58.77Bn

Revenue
USD 561.2Bn

Employees
2691

Objective and challenges

The automotive software provider required comprehensive market intelligence, including an analysis of market potential and competitive intelligence, to assess their existing product and service portfolio.

Additionally, the client sought an in-depth analysis of software and electrical/electronic (E/E) architecture, which encompassed OEM benchmarking, future roadmap evaluation, and examination of OEM-supplier relationships. The objective was to gather valuable insights and formulate an effective business development strategy.

Approach and solution

Our team presented a solution framework aligned with the client's overarching objectives to achieve the desired outcome. We implemented the following approach to deliver a comprehensive solution:

- Framed a dedicated market assessment and forecasting model specifically tailored for the global automotive software market, considering various factors that provided a three-dimensional perspective from the AV, EV, and IV OEMs, Tier-1 suppliers, and technology provider's viewpoint.

- Developed a competitive landscape analysis of the client peers, focusing on key attributes of the automotive software.

- Adopted a tier-down approach to assess the software and electrical/electronic (E/E) architecture of leading OEMs.

- Mapped the future roadmap and aspirations of prominent OEMs from a vehicle architecture perspective.

- Employed a data-centric approach to gather and analyze information on supplier relationships, with a specific focus on software and electrical/electronic (E/E) architecture.

Competitive benchmark: Automotive software

Sr. No.	Company	SW Platform OS & Middleware	Simulation & Virtualization Engine	Microservices, Over-the-Air-Updates & Security	Integration & Collaboration Platform	Cloud Services, Tools & Data Solutions	SAE Levels and Scalability
1	Company 1	✓	✓		✓	✓	Scalable to L4
2	Company 2			✓			Not identified
3	Company 3			✓			Not identified
4	Company 4	✓		✓	✓	✓	L1-L3
5	Company 5	✓	✓			✓	L4
6	Company 6			✓			Not identified
7	Company 7	✓					L4
8	Company 8	✓	✓	✓	✓	✓	L2-L5
9	Company 9	✓	✓			✓	L4
10	Company 10		✓			✓	L3-L4

Source: Netscribes Analysis

Results delivered

Our automotive and mobility intelligence team accomplished the following outcomes:

- Comprehensive analysis of the global automotive software market, including segmentation by vehicle class, software layer, and function.
- Development of a landscape showcasing the top software suppliers for automotive OEMs, along with benchmarking of their products and services.
- In-depth examination of leading OEMs' software and E/E architecture strategies, as well as their aspirations for software-defined vehicles (SDVs).
- Extensive coverage of the dynamics of supplier relationships within the automotive software industry.

Client benefit

By providing actionable insights through in-depth qualitative and quantitative research, our team enabled the client to optimize their portfolio effectively. Armed with this intelligence the stakeholders were able to successfully formulate an informed business development strategy for automotive software.

Explore how Netscribes can help you drive innovation and strategically navigate the evolving automotive landscape.

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