

# ADAS Software Ecosystem Assessment

## The Objective

The client was interested in understanding the current environment pertaining to ADAS software ecosystem areas, for product development initiatives being undertaken by the automotive industry for ADAS. Below were key objectives :

- **Supplier/Partner Identification and Analysis**
- **Competitor Activity and Approach Mapping**
- **OEM Viewpoints and Needs Assessment**

## Evalueserve's Solution

Evalueserve supported the client with following solutions:

- Development of long-list of suppliers offering ADAS simulation & testing, integration platforms, software middleware, cloud & data solutions, etc.
- Detail primary research to gather hard-to-find insights on the various on-going ADAS development approaches. Interviews were primarily conducted with –
  - **Automotive OEMs**
  - **Tier 1 suppliers**
  - **Partners/suppliers (shortlisted from the long list by Continental)**

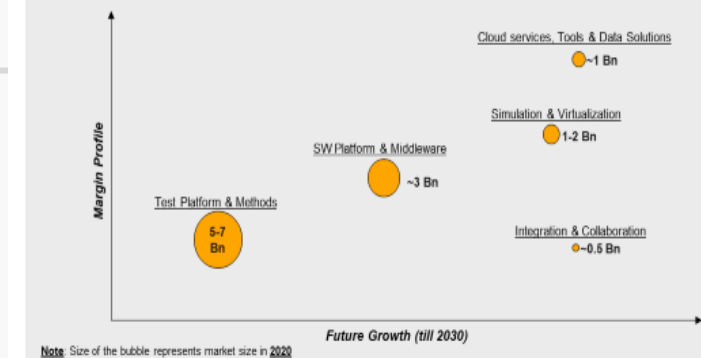
## Outcome

- **ADAS Software Industry Size and Profitability** – The client developed an understanding of the current and future scale of opportunity, and segments of higher attractiveness
- **Critical Success Factors**– Based on the existing strategies of leading partners/suppliers & competitors in the space, the client was able to identify the most important points to be considered while engaging with prospects, including the need for partnership ecosystem development
- **Potential Partner Identification** – The client also developed a detailed understanding of the current partner landscape, and the final output could act as a feed for its further partner development initiatives

## Snapshots

Cloud services, Tools & data Solutions looks the most attractive segment

Overall ADAS and AD software market size: **USD 15 Bn**  
 Market Size of 5 Target Segments in Scope: **USD 11 Bn** → Growth CAGR till 2030 : 15%  
 Remaining market: **USD 4 Bn** ( for functions development – e.g. sensor fusion)



Key Partnerships in ADAS Software Ecosystem

