



Technology Outlook: Automotive HMI Development

Case Study

Technology Outlook: Automotive HMI Development

Client	A leading automotive supplier
Industry	Automotive components and technologies
Products	Automotive HMI and vehicle cockpit interfaces

Context

- The client focused on gaining insights regarding the future dynamics of HMI development in the automotive industry and determining how the value chain and tools for developing automotive HMI will transform in the near future.
- The study also identified HMI development tool chains preferred by key OEMs and accordingly defined client strategies for improving capabilities and resource management.

Key Business Questions

- What are the key strategies adopted by OEMs with regard to HMI development?
- How will OEMs facilitate HMI development? Which tasks will be done by OEMs and how will these tasks be outsourced to suppliers?
- Which are the selected tool chains used by key OEMs for HMI development?

Engagement Scope

<p>1 Overview of HMI</p> <ul style="list-style-type: none"> ▪ Overview of HMI application in the automotive industry ▪ Automotive HMI design for tools/tool chain landscape ▪ Benchmarking various solutions in terms of key features and capabilities for key tool chains that will be used in the near future (~ 5 years) 	<p>2 Industry Trends</p> <ul style="list-style-type: none"> ▪ Overview of various industry trends with respect to HMI design process/tool choice ▪ Analysis of trends across the industry in terms of work division (in-house or outsourced) ▪ Categorization of essential tools that are used widely across the industry in general for different design tasks 	<p>3 Competitive Landscape</p> <ul style="list-style-type: none"> ▪ Identification of key competitors and customers (OEMs) and analysis of tools currently preferred ▪ Comprehend how customers (OEMs) organize their HMI development tasks and future strategies with respect to <ul style="list-style-type: none"> - OEM strategies (for key OEMs) - Competitor strategies 	<p>4 Key Findings and Conclusion</p> <ul style="list-style-type: none"> ▪ Detailed overview of the HMI design in automotive, software, and various tools used in the development process ▪ Value chain of the HMI design in the automotive industry ▪ Key OEMs and competitor analysis and future growth strategies
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Research Methodology

Secondary Research

- Conducted desk research to understand the technology (software tools) landscape
- Referred to paid and open databases to understand HMI development trends

Primary Research

- 20+ telephonic interviews with OEMs, software companies, industry experts, etc.

Benefits to Client

- The client was able to gather information with respect to the evolving HMI development process, value chain, and software tools.
- A benchmarking of software tools to develop HMI was provided to enable selection and investment in tool chains.
- Industry analysis covering competitors and OEMs (customers) helped the client define strategies for developing capabilities and resource management.

Sample Analysis

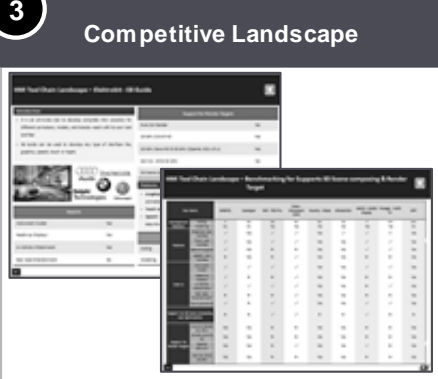
1 Overview of HMI



2 Industry Trends



3 Competitive Landscape



4 Key Findings and Conclusion



Thank you

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