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220 – Bi-Monthly Market Insights

SBD's Bi-Monthly Market Insights contextualize the most important announcements for industry stakeholders. Further analysis identifies their short and long-term impacts and maps out the best practices for responding to them.



Disruption
Radar

#2210

Quarterly Wrap-Ups

Many companies today have quarterly reviews that work to assess their recent activity, output, and financial results while looking to the future. These reviews often provide an outside-in perspective, that helps re-tune tactics, and an opportunity for companies to establish targets for the next quarter.

Within the connected, autonomous, shared mobility, EV, and security (CASES) sectors – a multitude of new developments and announcements occur within each quarter. Likewise, across these sectors, every quarter provides a new series of announcements, partnerships, and acquisitions. This is in addition to the new technologies, innovations, and concepts showcased by key industry players at automotive events held throughout the year. With more announcements coming from the CASES landscape at an increasingly frequent rate, tracking these developments and assessing the most significant ones for the industry can quickly become a difficult task.

SBD's Quarterly Wrap-Ups provide a structured, focused, analysis of CASES developments over the previous quarter. Each report highlights the key themes of the announcements made every quarter as well as the subtle market changes that could point towards longer-term trends in the future. The report series works similarly to understand, and anticipate, how this market as a whole is expected to change in the coming months.

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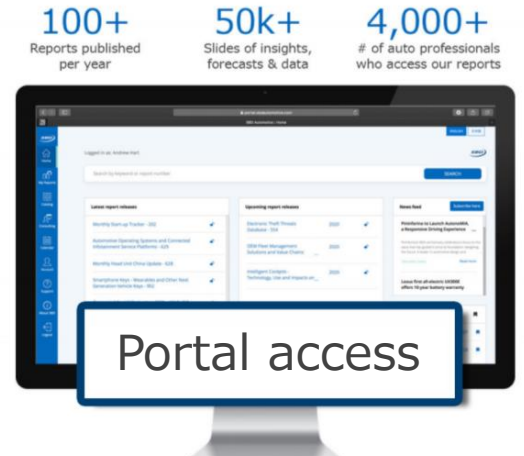
Key questions answered

- > What were the key themes across all the CASES-related announcements made over the last 3 months?
- > What do these announcements mean and how could they affect the eco-system?
- > What should you look out for over the coming months?
- > What subtle changes to the CASES market occurred that may point towards longer-term trends?

This research supports



Do I have access?



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Quarterly Wrap-Up

Summary & insights of the top trends from the last three months

2210 - Quarterly Wrap-Up

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- Automakers prioritize car navigation upgrades
- Tech giants are improving the interactive experience
- New players joining the SDV bandwagon
- Specialized AV developers are the most preferred partners
- Autonomous mobility inching closer to commercialization
- Automakers are investing more in hydrogen fuel
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Introduction

Introduction

SBD's Quarterly Wrap-up helps you quickly catch-up on **CASES trends** from the **last three months**, providing **insights** from our analysts on the impact of **major announcements**.

How to use this Report

Top Trends

- Trends organized within SBD's **Trend Radar** and categorized by **CASES**
- **Related news** explained for each trend along with **data** and **insights**

Major Movers

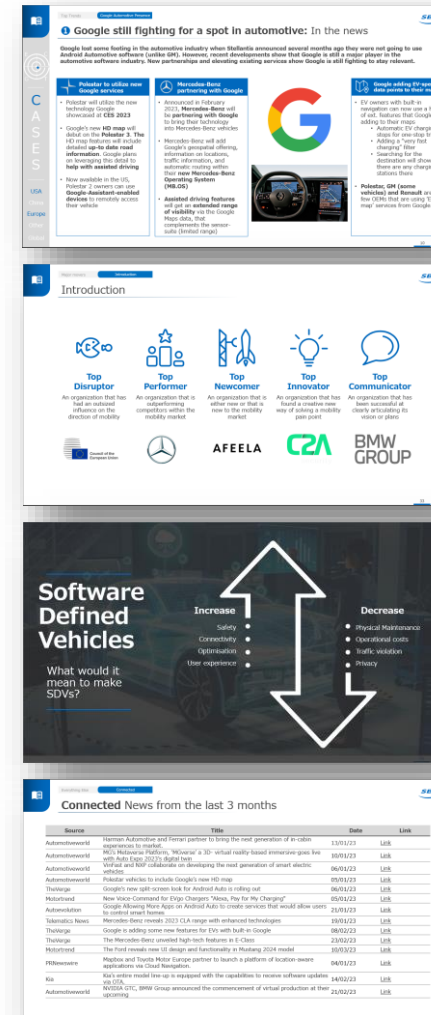
- **Five organizations** picked based on their **impact** over the last quarter
- **Announcements** relating to each of the companies **analyzed**

Big Thoughts

- One **big topic** chosen that is relevant to each quarter
- SBD experts analyze the topic in depth providing **data & insight**

Everything Else

- Complete list of every **major news article** and **announcement** from the last quarter
- Articles organized by **CASES**





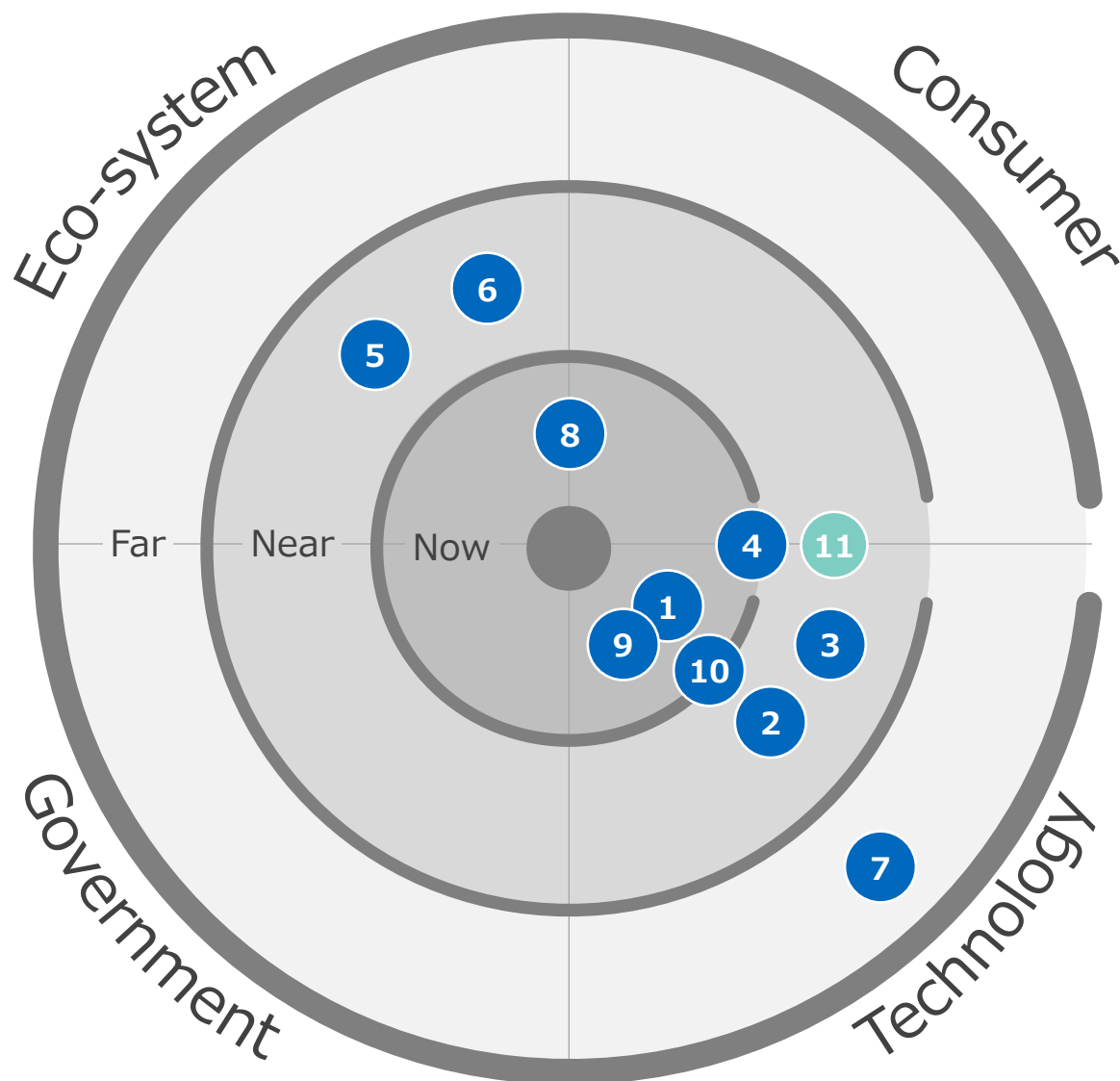
Example slides from the report



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Q1 2023 Trend Radar



1

Google establishing new partnerships

Tech giant Google is working on supplying vehicle software and services

2

Automakers prioritize car navigation upgrades

Automakers look to add more screens and embedded applications

3

Tech giants are improving the interactive experience

The interactive in-cabin experience are seeing significant updates

4

New players joining the SDV bandwagon

Automakers and suppliers moving towards the SDV Architecture

5

Specialized AV developers are the most preferred partners

Automakers are further developing autonomy with the help of strategic partners

6

Autonomous mobility inching closer to commercialization

Investments being made to enhance the safety, efficiency and reliability of autonomous vehicles

7

Automakers are investing more in Hydrogen fuel

Some automakers are exploring hydrogen fuel cell technology

8

EV players engage in a price war

Strategic price cuts occur for EVs across market

9

New EVs come with extended range

Automakers are deploying better EV technology on high-end models

10

Cyber security and authentication going mainstream

With more connectivity in cars keeping them secure is an issue

11

AI's early applications in automotive

OEMs are integrating AI into their entire value chain

Special edition (Let us know if you'd like to hear more in future editions)



1 Google establishing new partnerships: In the news

Google lost some footing in the automotive industry when Stellantis announced several months ago they were not going to use Android Automotive software (unlike GM). However, recent developments show that Google is still a major player in the automotive software industry. Some new partnerships and improvement/upgrades in the existing services indicate that Google is pushing hard to stay relevant.



Polestar to utilize new Google services

- Polestar will utilize the new technology Google showcased at **CES 2023**
- Google's new **HD map** will debut on the **Polestar 3**. The HD map features will include detailed **up-to date road information**. Google plans on leveraging this detail to **help with assisted driving**
- Now available in the US, Polestar 2 owners can use **Google-Assistant-enabled devices** to remotely access their vehicle.



Mercedes-Benz partnering with Google

- Announced in February 2023, **Mercedes-Benz** will be **partnering with Google** to bring their technology into Mercedes-Benz vehicles
- Mercedes-Benz will add Google's geospatial offering, information on locations, traffic information, and automatic routing within their **new Mercedes-Benz Operating System (MB.OS)**
- **Assisted driving features** will get an **extended range of visibility** via the Google Maps data, that complements the sensor-suite (limited range)



Google adding EV-specific data points to their maps

- EV owners with built-in navigation can now use a host of ext. features that Google is adding to their maps
 - Automatic EV charging stops for one-stop trips
 - Adding a "very fast charging" filter
 - Searching for the destination will show if there are any charging stations there
- **Polestar, GM (some vehicles) and Renault** are a few automakers that are using 'EV map' services from Google.



4 New players joining the SDV bandwagon: In the news

The slow nature of the automotive product lifecycle has traditionally made it difficult to respond to the ever-changing market dynamics and update vehicle features on the go. The convergence of electrification, autonomous driving and enhanced in-car UI/EX coupled with ubiquitous connectivity now creates an opportunity for the entire automotive industry to overcome these limitations and enhance customer experiences through novel business models, features, and experiences – all primarily enabled by software.

Qualcomm launches Snapdragon Auto 5G platform targeting SDV

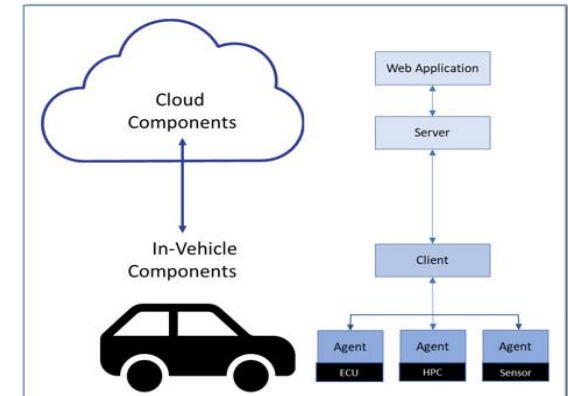
- Qualcomm has released the Snapdragon Auto 5G Modem-RF Gen 2 which boasts high-performance processing power and network capacity.
- It enables short-range safety and mobility services** and features a next-generation location engine. As fewer components are needed, the new technology will result in lower costs.
- Snapdragon Auto 5G Modem-RF Gen 2 will be **commercially available by late 2023**. It is 3GPP Release 16 compliant.

Infineon, Apex.AI partner on SDVs

- Infineon Technologies AG and software firm Apex.AI** have co-developed a new platform that expedites software development for automotive customers and enables faster integration of safety-critical automotive functions into future vehicles.
- By integrating Apex.AI's software development kit and Infineon's AURIX TC3X microcontroller, the new platform will help manufacturers and their partners introduce new features and critical safety functions into vehicles.

KIA allows OTA software upgrades

- Updates for the car's head unit and navigation system** will be simple to acquire through Kia's OTA, and any potential software faults will be fixed.
- Kia's OTA ensures that consumers no longer need to manually **download via the official Kia Navigation Updater Portal** or go to a Kia dealership to update their vehicle's software.
- Customers will benefit from more comfort and time savings through the OTA technology, which automatically updates the navigation and infotainment systems.





6 Autonomous mobility inching closer to commercialization: In the news

Shared mobility backed by autonomous driving technology can decrease transportation costs, expedite goods deliveries, reduce downtime and increase accessibility to low-income households and persons with mobility issues. A lot of investments are being made by automakers and AV developers in this space to enhance the safety, efficiency, and reliability of autonomous vehicles so they can be deployed in real-world scenarios. This is expected to continue in the future as automakers and tech companies introduce more pilot trials and governments make laws to make autonomous mobility a commercially viable option.

Toyota Gosei teases SAE L4 mobility concept vehicle

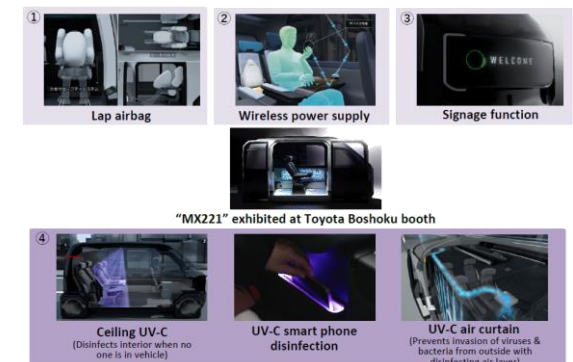
- **Toyota Gosei Co., Ltd.**, a company within the Toyota Group, has developed innovative technologies to be incorporated into the **MX 221 concept model** which is an SAE Level vehicle designed for autonomous mobility
- **The technologies include** a lap airbag, wireless power supply, LED lights for communication, and a UV-C LED disinfecting system. **The vehicle is a collaborative project among six Toyota Group companies** and is expected to launch after 2030.

University of Notre Dame launches robotic deliveries

- The University of Notre Dame, GrubHub, and Starship Technologies are introducing robot delivery via Starship's fleet on campus
- **Starship's fleet of up to 30 on-demand robots will deliver from six campus eateries:** Au Bon Pain, Garbanzo, The Gilded Bean, Hagerty Family Cafe, Modern Market, and Taco Bell. The University's more than 17,000 students, faculty, and staff

Gatik launches driverless deliveries in Texas

- Gatik has started its driverless delivery operations in collaboration with Kroger, the American retail company
- Gatik will operate 20-foot trucks that can transport frozen food seven days a week to make multiple deliveries to **three Kroger locations** from the company's **Dallas distribution center**.
- Trucks will run 12 hours a day, seven days a week, and will be doing a minimum of four runs to each of the drop-off locations





⑧ EV players engage in a price war: In the news

Lowering the prices of EV models can increase their accessibility and lead to higher sales and market share. EV demand is expected to grow as more people become aware of their environmental benefits, and price cuts may be a strategy to capitalize on this demand, rather than being a sign of declining popularity.



Tesla price drop

- **Tesla** has reduced prices by up to £8000 for the Model 3 and Model Y vehicles in the UK.
- All **undelivered orders will have their pricing updated** automatically to reflect the changes. The discounts mirror those made in China and other Asian markets.



Ford cuts prices on Mustang Mach-E

- **Ford** is cutting prices by up to 8% on various versions of the Mach-E, as well as cutting the price of the **extended-range battery by about 19%.**
- This move is aimed to remain competitive and to make **Mach-E** one of the best-selling EVs.
- Although **Ford** may lose money on some trim levels, it expects to see profitability in its EV production as technology and cost efficiencies improve.





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Do you have any questions?

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