



Software-Defined Vehicle

#407

# Automotive OS for SDV Deep Dive

In a world of software-hardware decoupling, managing the complexity of the growing supplier base will be one of the biggest challenges an OEM will face while realizing the SDV. Here, OEMs will need to prioritize systems that help address this by promoting collaboration and faster integration. OS platforms likewise have the potential to boost product competitiveness for OEMs, but must also go through rigorous market verification and meet international advanced standards.

Developing a sourcing plan for a thorough evaluation of open-source, and how to accommodate it, will be critical for OEMs interested in or actively developing a software-defined vehicle. This study will support those OEMs in deciding what to in-source and outsource from a software development standpoint.

Here, our SDV experts examine the ever-evolving ecosystem of automotive operating systems. Designed with the SDV in mind, this study maps the commercial models being deployed across the vehicle OS market, while highlighting their benefits to OEM business and challenges to adoption. Here, it allows planning teams to evaluate the maturity of open-source OSEs for in-vehicle use, and understand OEM preferences on OS sourcing in terms of in-house development and supplier contracts.

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The report takes a strategic look into how OEMs are tackling critical software development challenges for the SDV and understands how organizational and technical strategies can mutually optimize vehicle software development, while identifying the capabilities of toolsets used today and the non-automotive software development trends that will impact the automotive value chain.

### COVERAGE



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# Key Benefits

- > Identify OEM preferences on OS sourcing and differences by safety criticality requirements.
- > Map the commercial models of different in-vehicle OSEs in the current market, their benefits to OEM business, and challenges to adoption.
- > Evaluate the current maturity of open-source OSEs for in-vehicle use
- > Understand OEMs preferences on sourcing in-vehicle operating system in terms of in-house development and supplier contract.
- > Review the potential impact of OS development on vehicle cost structures, comparing BOM-cost based vs TCO-based structures.

# This research supports



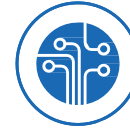
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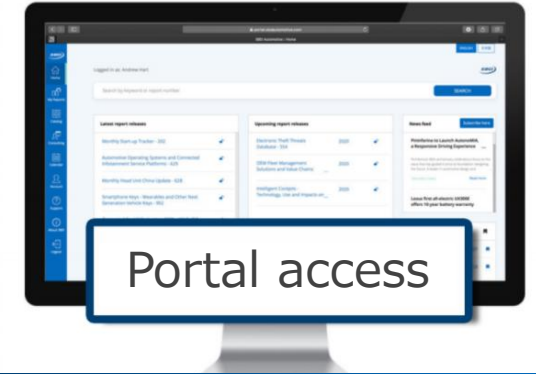
Technology Prioritization

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## Do you have any questions?

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