

Automotive Bring Your Own Device (BYOD) Market 2013-2018 - Smartphones & Tablets vs. Embedded Connected Car Systems

<https://marketpublishers.com/r/A39953DC3FDEN.html>

Date: August 2013

Pages: 141

Price: US\$ 2,635.00 (Single User License)

ID: A39953DC3FDEN

Abstracts

Report Details

The global car industry is increasingly incorporating telematics into vehicle design, for the purpose of infotainment, safety, security and communications. Meanwhile consumer expectations are also evolving, forcing vehicle manufacturers to offer advanced connectivity systems in their cars and ensuring steady growth of demand. Government regulations for emergency assistance and for stolen vehicle tracking are speeding up the process of telematics adoption. We expect that by 2025 all cars will be connected in one way or another. As a consequence Visiongain has determined that the total revenue from the connected car market in 2013 will reach \$21.7bn.

However, in-car connectivity can be achieved in a number of different ways - embedded in the car by the manufacturer or made possible with bring your own device (BYOD) solutions that promise to expand the revenue potential and adoption rates of smartphones, tablets and mobile operators. This report examines each connectivity type in detail forecasting both revenues and shipments from 2013-2018 of cars utilising each connectivity solution. For investors and potential ecosystem members this report will provide a timely and holistic look at how to position your company in this market in order to reap substantial revenues and market shares going forward.

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Global BYOD vs. Embedded Connected Car revenue forecasts from 2013-2023

Global BYOD vs. Embedded Connected Car shipment forecasts from 2013-2023

You will find global BYOD vs. Embedded Connected Car submarket forecasts (revenue & shipments) between 2013-2018

Global embedded solution revenues

Global embedded solution shipments

Global tethered solution revenues

Global tethered solution shipments

Global integrated solution revenues

Global integrated solution shipments

Global smartphone shipment forecast

Global tablet shipment forecast

Regional BYOD vs. embedded connected car forecasts (revenues & shipments) between 2013-2018

North America smartphone shipment forecast

North America tablet shipment forecast

North America embedded solutions revenues

North America integrated solutions revenues

North America tethered solutions revenues

North America embedded solutions shipments

North America integrated solutions shipments

North America tethered solutions shipments

Latin America smartphone shipment forecast

Latin America tablet shipment forecast

Latin America embedded solutions revenues

Latin America integrated solutions revenues

Latin America tethered solutions revenues

Latin America embedded solutions shipments

Latin America integrated solutions shipments

Latin America tethered solutions shipments

Europe smartphone shipment forecast

Europe tablet shipment forecast

Europe embedded solutions revenues

Europe integrated solutions revenues

Europe tethered solutions revenues

Europe embedded solutions shipments

Europe integrated solutions shipments

Europe tethered solutions shipments

Asia Pacific smartphone shipment forecast

Asia Pacific tablet shipment forecast

Asia Pacific embedded solutions revenues

Asia Pacific integrated solutions revenues

Asia Pacific tethered solutions revenues

Asia Pacific embedded solutions shipments

Asia Pacific integrated solutions shipments

Asia Pacific tethered solutions shipments

Middle East and Africa smartphone shipment forecast

Middle East and Africa tablet shipment forecast

Middle East and Africa embedded solutions revenues

Middle East and Africa integrated solutions revenues

Middle East and Africa tethered solutions revenues

Middle East and Africa embedded solutions shipments

Middle East and Africa integrated solutions shipments

Middle East and Africa tethered solutions shipments

17 leading BYOD & connected car companies are identified and profiled.
Information is provided on recommended vendor and manufacturer strategies
for succeeding in the connected car space

Airbiquity

Apple

BMW

Broadcom

Chrysler

Daimler

Ford

General Motors

Honda

Hughes Telematics

Mahindra Satyam

OnStar

Qualcomm

Sierra Wireless

Toyota

WirelessCar

Volkswagen

A SWOT analysis of the connected car market

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Contents

1. EXECUTIVE SUMMARY

- 1.1 Global Market Overview
- 1.2 Industry Convergence - Targets and Goals
- 1.3 Benefits of This Report
- 1.4 Who is This Report For?
- 1.5 Methodology
- 1.6 Key Points Emerged From This Research
 - 1.6.1 Global Connected Car Market Forecasts 2013-2018
 - 1.6.2 Regional Smart Devices Shipment Forecasts 2013-2018
 - 1.6.2.1 Smartphone Shipment Forecasts 2013-2018
 - 1.6.2.2 Tablet Shipment Forecasts 2013-2018
 - 1.6.2.3 Regional Connected Cars Using Embedded Solutions Shipment Forecasts 2013-2018
 - 1.6.2.4 Regional Connected Cars Using Integrated Solutions Shipment Forecasts 2013-2018
 - 1.6.2.5 Regional Connected Cars Using Tethered Solutions Shipment Forecasts 2013-2018
 - 1.6.3 Regional Connected Car Revenue Forecasts 2013-2018
 - 1.6.3.1 Regional Total Connected Car Revenue Forecasts 2013-2018
 - 1.6.3.2 Regional Connected Car Revenue Forecasts from Embedded Solutions 2013-2018
 - 1.6.3.3 Regional Connected Car Revenue Forecasts from Integrated Solutions 2013-2018
 - 1.6.3.4 Regional Connected Car Revenue Forecasts from Tethered Solutions 2013-2018

2. INTRODUCTION TO THE BYOD VS. EMBEDDED CONNECTED CAR MARKET

- 2.1 Connected Car Ecosystem Overview
- 2.2 Connected Car Definition
- 2.3 Connection Types
 - 2.3.1 Embedded Connectivity
 - 2.3.2 Connected Cars Using Integrated Systems
 - 2.3.3 Connected Cars Using Tethered Smartphones and Tablets
- 2.4 The BYOD Market
 - 2.4.1 Global Smartphone Shipment Forecast 2013-2018

- 2.4.1.1 Regional Smartphone Shipment Forecast 2013-2018
- 2.4.2 Global Tablet Shipment Forecast 2013-2018
 - 2.4.2.1 Regional Tablet Shipment Forecast 2013-2018

3. GLOBAL BYOD CONNECTED CAR FORECASTS 2013-2018

- 3.1 Global Connected Car Shipment Forecast by Connection Type 2013-2018
 - 3.1.1 Global Embedded Connected Car Shipment Forecast 2013-2018
 - 3.1.2 Global Integrated Connected Car Shipment Forecast 2013-2018
 - 3.1.3 Global Tethered Connected Car Shipment Forecast 2013-2018
 - 3.1.4 Global Not Connected Car Shipment Forecast 2013-2018
- 3.2 Global Total Connected Car Revenue Forecast 2013-2018
- 3.3 Global Connected Car Revenue Forecast by Connectivity Type 2013-2018
 - 3.3.1 Global Embedded Connected Car Revenue Forecast 2013-2018
 - 3.3.2 Global Tethered Connected Car Revenue Forecast 2013-2018
 - 3.3.3 Global Integrated Connected Car Revenue Forecast 2013-2018

4. REGIONAL AUTOMOTIVE BYOD CONNECTED CAR FORECASTS 2013-2018

- 4.1 Regional Total Connected Car Market Revenue Forecast Summary 2013-2018
- 4.2 Regional Connected Car Market Revenue Forecast for Embedded Solutions 2013-2018
- 4.3 Regional Connected Car Market Revenue Forecast for Tethered Solutions 2013-2018
- 4.4 Regional Connected Car Market Revenue Forecast for Integrated Solutions 2013-2018
- 4.5 Regional Connected Car with Embedded Solutions Shipment Forecast 2013-2018
- 4.6 Regional Connected Car with Integrated Solutions Shipment Forecast 2013-2018
- 4.7 Regional Connected Car with Tethered Solutions Shipment Forecast 2013-2018
- 4.8 North American Connected Car Market 2013-2018
 - 4.8.1 Contributing Factors in North America's Connected Car Market Share 2013
 - 4.8.2 North American Connected Car Total Revenue Forecast 2013-2018
 - 4.8.3 North American Connected Car Shipment Forecast for Embedded Solutions 2013-2018
 - 4.8.4 North American Connected Car Shipment Forecast for Integrated Solutions 2013-2018
 - 4.8.5 North American Connected Car Shipment Forecast for Tethered Solutions 2013-2018
- 4.9 Latin American Connected Car Market 2013-2018

- 4.9.1 Latin American Total Connected Car Revenue Forecast 2013-2018
- 4.9.2 Latin American Connected Car Revenue Forecast by Connection Type 2013-2018
- 4.9.3 Latin American Connected Car Shipment Forecast for Embedded Solutions 2013-2018
- 4.9.4 Latin American Connected Car Shipment Forecast for Integrated Solutions 2013-2018
- 4.9.5 Latin American Connected Car Shipment Forecast for Tethered Solutions 2013-2018
- 4.10 What Factors are Driving Connected Car growth in Europe?
 - 4.10.1 European Connected Car Market - Barriers to Entry 2013
 - 4.10.2 European Total Connected Car Revenue Forecast 2013-2018
 - 4.10.3 European Connected Car Revenue Forecast by Connection Type 2013-2018
 - 4.10.4 European Connected Car Shipment Forecast for Embedded Solutions 2013-2018
 - 4.10.5 European Connected Car Shipment Forecast for Integrated Solutions 2013-2018
 - 4.10.6 European Connected Car Shipment Forecast for Tethered Solutions 2013-2018
- 4.11 Asia Pacific Connected Car Market 2013-2018
 - 4.11.1 The Japanese Market Share 2013
 - 4.11.2 Drivers and Restraints in the Japanese Telematics Market
 - 4.11.3 The Chinese Connected Car Market 2013
 - 4.11.4 How China's Densely Populated Areas Will Account for 95% of Telematics Usage
 - 4.11.5 Asia Pacific Total Connected Car Revenue Forecast 2013-2018
 - 4.11.6 Asia Pacific Connected Car Revenue Forecast by Connection Type 2013-2018
 - 4.11.7 Asia Pacific Connected Car Shipment Forecast for Embedded Solutions 2013-2018
 - 4.11.8 Asia Pacific Connected Car Shipment Forecast for Integrated Solutions 2013-2018
 - 4.11.9 Asia Pacific Connected Car Shipment Forecast for Tethered Solutions 2013-2018
- 4.12 Middle East and African Connected Car Market 2013-2018
 - 4.12.1 Middle East and African Total Connected Car Revenue Forecast 2013-2018
 - 4.12.2 Middle East and African Connected Car Revenue Forecast by Connection Type 2013-2018
 - 4.12.3 Middle East and Africa Connected Car Shipment Forecast for Embedded Solutions 2013-2018
 - 4.12.4 Middle East and Africa Connected Car Shipment Forecast for Integrated

Solutions 2013-2018

4.12.5 Middle East and Africa Connected Car Shipment Forecast for Tethered Solutions 2013-2018

5. LEADING COMPANIES IN THE BYOD CONNECTED CAR MARKET

5.1 Airbiquity

5.1.1 Airbiquity's Role in the Connected Car Market

5.1.2 Airbiquity's Future Outlook

5.2 Apple

5.2.1 Apple Move Towards the BYOD Connected Car Market

5.2.2 Apple to Take Automotive OS Marketshare

5.3 BMW AG

5.3.1 BMW's Role in the Connected Car Market

5.3.2 BMW's Future Outlook

5.4 Broadcom

5.4.1 Broadcom's Role in the Connected Car Market

5.4.1.1 Broadcom and the OPEN Alliance

5.5 Chrysler

5.5.1 Chrysler's Role in the Connected Car Market

5.5.2 Chrysler's Future Outlook

5.6 Daimler AG

5.6.1 Daimler's Role in the Connected Car Market

5.6.2 Daimler's Future Outlook

5.7 Ford

5.7.1 Ford's Role in the Connected Car Market

5.7.2 Ford's Future Outlook

5.7.3 Ford Switching Automotive OS?

5.8 General Motors

5.8.1 GM's Role in the Connected Car Market

5.8.2 GM's Future Outlook

5.9 Honda

5.9.1 Honda's Role in the Connected Car Market

5.9.2 Honda's Future Outlook

5.10 Hughes Telematics

5.10.1 HTI's Role in the Connected Car Market

5.10.2 HTI's Future Outlook

5.11 Mahindra Satyam

5.11.1 Mahindra Satyam's Role in the Connected Car Market

- 5.11.2 Mahindra Satyam's Future Outlook
- 5.12 OnStar
 - 5.12.1 OnStar's Role in the Connected Car Market
 - 5.12.2 OnStar's Future Outlook
- 5.13 Qualcomm
 - 5.13.1 Qualcomm's Role in the Connected Car Market
 - 5.13.2 Qualcomm's Future Outlook
- 5.14 Sierra Wireless
 - 5.14.1 Sierra Wireless' Role in the Connected Car Market
 - 5.14.2 Sierra Wireless' Future Outlook
- 5.15 Toyota
 - 5.15.1 Toyota's Role in the Connected Car Market
 - 5.15.2 Toyota's Future Outlook
- 5.16 WirelessCar
 - 5.16.1 WirelessCar's Role in the Connected Car Market
 - 5.16.2 WirelessCar's Future Outlook
- 5.17 Volkswagen Group
 - 5.17.1 Volkswagen's Role in the Connected Car Market
 - 5.17.2 Volkswagen's Future Outlook
- 5.18 Other Connected Car Companies of Note

6. EXPERT OPINION - INTERVIEW BROADCOM

- 6.1 Broadcom in the Connected Car Space
- 6.2 Key Trends and Developments in the Connected Car Market
- 6.3 Driving Factors in the Connected Car Market
- 6.4 Restraining Factors in the Connected Car Market
- 6.5 Broadcom's Future Plans for the Connected Car Market
- 6.6 Connected Car Value Proposition
- 6.7 Mobile Operators in the Connected Car Space
- 6.8 Future Technological Developments in the Connected Car Space
- 6.9 Leading industry Sectors in the Connected Car Space
- 6.10 Regional Uptake of the Connected Car
- 6.11 Connected Car Growth Rates
- 6.12 Connected Car Challenges and Opportunities
- 6.13 Most Prevalent Method of Connectivity for Connected Cars by 2018

7. CONNECTED CAR - BYOD VS. EMBEDDED SWOT ANALYSIS

8. SMARTPHONES & TABLETS VS. EMBEDDED CONNECTED CAR SYSTEMS CONCLUSIONS AND RECOMMENDATIONS

8.1 Global Connected Car Market Drivers & Restraints

8.2 Global Connected Car Market Outlook 2013-2018

8.3 Regulatory Drivers

8.4 Privacy and Safety Barriers - Will they Halt Uptake?

8.5 BYOD vs. Embedded Which Will Ultimately Triumph?

8.6 Key Points Emerged From This Research

8.6.1 Global Connected Car Market Forecasts 2013-2018

8.6.2 Regional Connected Car Market Shipment Forecasts 2013-2018

8.6.2.1 Smartphone Shipment Forecasts 2013-2018

8.6.2.2 Tablet Shipment Forecasts 2013-2018

8.6.2.3 Regional Connected Cars Using Embedded Solutions Shipment Forecasts
2013-2018

8.6.2.4 Regional Connected Cars Using Integrated Solutions Shipment Forecasts
2013-2018

8.6.2.5 Regional Connected Cars Using Tethered Solutions Shipment Forecasts
2013-2018

8.6.3 Regional Connected Car Market Revenue Forecasts 2013-2018

8.6.3.1 Regional Total Connected Car Market Revenue Forecasts 2013-2018

8.6.3.2 Regional Connected Car Revenue Forecasts from Embedded Solutions
2013-2018

8.6.3.3 Regional Connected Car Revenue Forecasts from Integrated Solutions
2013-2018

8.6.3.4 Regional Connected Car Revenue Forecasts from Tethered Solutions
2013-2018

9. GLOSSARY

LIST OF FIGURES

Figure 2.1: Connected Car Ecosystem

Figure 2.2: Connected Car Connection Types

COMPANIES LISTED

AB Volvo

Accenture

Agilent
Airbiquity
Apple
AT&T Wireless
BMW AG
Broadcom
Chevrolet
Chrysler Group LLC
Continental
Daimler AG
Dell
Delphi
Denso
Ericsson
Federal Mogul
Fiat
Ford
Freescale Semiconductor
Fuji
Garmin
General Motors (GM)
Harman International
Honda Motor Company
Honeywell
Hughes Telematics
Hyundai
Hyundai Motor Company
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PSA Peugeot Citroen
Qualcomm
Renault
Ricardo plc
Robert Bosch GmbH
Rosenberger
Sagemcom
SAIC
Sierra Wireless
Sony
Sumatomo
Suzuki Motor Company
Telenor Conexxion
TeliaSonera
T-Mobile
Tomtom
Toyota Motor Corporation
Verizon Wireless
Volkswagen AG
Volvo
Wavecom
Wipro Technologies
WirelessCar
Yazaki

GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT

Connected Car Forum (CCF)
Cooperative Vehicle Infrastructure Systems (CVIS)
GSMA: Group Special Mobile Association
OPEN Alliance
GENIVI Alliance

List Of Charts

LIST OF CHARTS

Chart 2.3: Global Smartphone Shipment Forecast 2013-2018 (Millions, AGR %)

Chart 2.5: Regional Smartphone Shipment Forecast 2013-2018 (Millions)

Chart 2.7: Global Tablet Shipment Forecast 2013-2018 (Millions, AGR %)

Chart 2.9: Regional Tablet Shipment Forecast 2013-2018 (Millions)

Chart 3.1: Global Connected Car Shipments by Connection Type 2013-2018 (Millions)

Chart 3.3: Global Embedded Connected Car Shipments 2013-2018 (Millions, AGR %)

Chart 3.5: Global Integrated Connected Car Shipments 2013-2018 (Million, AGR %)

Chart 3.7: Global Tethered Connected Car Shipments 2013-2018 (Millions, AGR %)

Chart 3.9: Global Not Connected Car Shipments 2013-2018 (Millions, AGR %)

Chart 3.11: Global Total Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 3.13: Global Connected Car Revenue Forecast by Connectivity Type 2013-2018 (\$ Billions)

Chart 3.15: Global Embedded Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 3.17: Global Tethered Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 3.19: Global Integrated Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.1: Regional Total Connected Car Market Revenue Forecast Summary 2013-2018 (\$ Billions)

Chart 4.3: Regional Connected Car Market Revenue Forecast for Embedded Solutions 2013-2018 (\$ Billions)

Chart 4.5: Regional Connected Car Market Revenue Forecast for Tethered Solutions 2013-2018 (\$ Billions)

Chart 4.7: Regional Connected Car Market Revenue Forecast for Integrated Solutions 2013-2018 (\$ Billions)

Chart 4.9: Regional Connected Car with Embedded Solutions Shipment Forecast 2013-2018 (Millions)

Chart 4.11: Regional Connected Car with Integrated Solutions Shipment Forecast 2013-2018 (Millions)

Chart 4.13: Regional Connected Car with Tethered Solutions Shipment Forecast 2013-2018 (Millions)

Chart 4.15: North American Connected Car Total Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.17: North American Connected Car Revenue Forecast by Connection Type 2013-2018 (\$ Billions)

Chart 4.19: North American Connected Car Shipment Forecast for Embedded Solutions 2013-2018 (Millions, AGR %)

Chart 4.21: North American Connected Car Shipment Forecast for Integrated Solutions 2013-2018 (Millions, AGR %)

Chart 4.23: North American Connected Car Shipment Forecast for Tethered Solutions 2013-2018 (Millions, AGR %)

Chart 4.25: Latin American Total Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.27: Latin American Connected Car Revenue Forecast by Connection Type 2013-2018 (\$ Billions)

Chart 4.29: Latin American Connected Car Shipment Forecast for Embedded Solutions 2013-2018 (Millions, AGR %)

Chart 4.31: Latin American Connected Car Shipment Forecast for Integrated Solutions 2013-2018 (Millions, AGR %)

Chart 4.33: Latin American Connected Car Shipment Forecast for Tethered Solutions 2013-2018 (Millions, AGR %)

Chart 4.35: European Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.37: European Connected Car Revenue Forecast by Connection Type 2013-2018 (\$ Billions)

Chart 4.39: European Connected Car Shipment Forecast for Embedded Solutions 2013-2018 (Millions, AGR %)

Chart 4.41: European Connected Car Shipment Forecast for Integrated Solutions 2013-2018 (Millions, AGR %)

Chart 4.43: European Connected Car Shipment Forecast for Tethered Solutions 2013-2018 (Millions, AGR %)

Chart 4.45: Asia Pacific Total Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.47: Asia Pacific Connected Car Revenue Forecast by Connection Type 2013-2018 (\$ Billions)

Chart 4.49: Asia Pacific Connected Car Shipment Forecast for Embedded Solutions 2013-2018 (Millions, AGR %)

Chart 4.51: Asia Pacific Connected Car Shipment Forecast for Integrated Solutions 2013-2018 (Millions, AGR %)

Chart 4.53: Asia Pacific Connected Car Shipment Forecast for Tethered Solutions 2013-2018 (Millions, AGR %)

Chart 4.55: Middle East and African Total Connected Car Revenue Forecast 2013-2018 (\$ Billions, AGR %)

Chart 4.57: Middle East and African Connected Car Revenue Forecast by Connection Type 2013-2018 (\$ Billions)

Chart 4.59: Middle East and Africa Connected Car Shipment Forecast for Embedded Solutions 2013-2018 (Millions, AGR %)

Chart 4.61: Middle East and Africa Connected Car Shipment Forecast for Integrated Solutions 2013-2018 (Millions, AGR %)

Chart 4.63: Middle East and Africa Connected Car Shipment Forecast for Tethered Solutions 2013-2018 (Millions, AGR %)

Chart 5.3: Global Smartphone Shipments by Operating System Q2 2013 (Millions)

Chart 5.4: Global Smartphone Marketshare by Operating System Q2 2013 (%)

Chart 5.5: Global Automotive OS Market Share 2013 (%)

Chart 5.6: Global Automotive OS Market Share Forecast 2018 (%)

Chart 8.2: Global BYOD vs. Embedded System Connected Car Market Shares 2013-2018 (%)

About

Leading Companies in the Connected Car Market

This chapter profiles some of the major companies in the connected car market. The connected car market is still in its infancy and OEM embedded telematics are therefore relatively expensive. As a result some of the largest carmakers do not yet offer connectivity in their cars. As a result the connected car market is constantly changing. This chapter will therefore attempt to show a representative sample of what are currently the major companies, rather than an exhaustive one. We have endeavoured to ensure that all information was accurate at the time when our research was undertaken.

Airbiquity's Role in the Connected Car Market

Airbiquity is a software company that provides the connected vehicle infrastructure for more than 16 million vehicles worldwide. Their platform brand, Choreo, provides services and connectivity for large players in the connected car market such as Ford, Nissan, Bosch, Motorola, BMW and GM's OnStar. Airbiquity has a strong focus on integrating mobile devices and cloud storage into vehicles. The company sees this as the most reliable and cost-efficient way to get wireless connectivity into the vehicle and therefore will push the BYOD market forward. The Choreo platform is also strongly focused on creating OEM value from connected vehicles. This value comes primarily from remote diagnostics where the vehicle itself provides feedback to the manufacturer.

Airbiquity's Future Outlook

Airbiquity is currently expanding its role in the electric vehicle (EV) telematics market. It is currently responsible for the in-vehicle web portal and telematics application of Nissan's electric Leaf model. Strong growth in the EV market in combination with an already well-established position in the connected car market will continue to strengthen Airbiquity's position in the telematics market.

Expert Opinion – Broadcom

In Q3 2013 visiongain conducted an exclusive interview with Tim Lau, Associate Product Line Director of Broadcom's automotive Ethernet business. Below is a transcript of this interview.

Broadcom in the Connected Car Space

Visiongain: Can you tell us a little bit about Broadcom's work in the connected car space?

Tim Lau: Broadcom is a leader in communications technology both from a wired and wireless perspective. We participate in the home, handheld and infrastructure marketplace, with communication technologies such as wireless, Bluetooth, Ethernet and others.

Our belief is that the connected car is becoming very real and we can leverage many of our existing communication technologies for the automotive space. Ethernet is ubiquitous in the consumer, enterprise and service provider spaces and yet it has never really been used in an automotive environment except for one very niche application which is OBD (on board diagnostics). The reason for that was, primarily because of the very strict EMC immunity and emission requirements for automotive in-vehicle networking.

Keeping this in mind, Broadcom developed a technology called BroadR-Reach, which is essentially the ability to send and receive data simultaneously over a single pair of unshielded twisted pair cables, and to still be able to meet all of the automotive EMC quality and reliability standards. This has opened the doors to very high bandwidth networking applications, if you consider using BroadR-Reach as a networking technology.

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