



EXECUTIVE INTELLIGENCE · DEEP DIVE

White Space in ADAS/AD Simulation

Positioning in the market for test and simulation solutions for automated driving, mid-2026

Anonymised demonstration case based on publicly available data and an internal assessment model — not a real engagement. Deep Dive edition: in-depth analysis with recommendations derived from the analysis; independent strategy development remains Advisory.

PACKAGE	Deep Dive
INDUSTRY	Automotive software / ADAS & Autonomous Driving
CASE TYPE	Anonymised (public sources + internal model)
SUBJECT	Market for ADAS/AD test and simulation solutions
DELIVERABLE LOGIC	Deep Dive → derived thrusts
PREPARED BY	Rivalerra Consulting — Technology & Mobility Intelligence

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CHAPTER 01 · MANAGEMENT SUMMARY

Executive Briefing

CORE MESSAGE

The market for ADAS/AD test and simulation solutions is re-weighting towards AI-assisted scenario generation — a white space that established test and simulation houses have not yet occupied, while regulation acts as a tailwind.

Key figures (analysis base)

36

OEMS ASSESSED (1)

20

COMPETITORS (6
CLUSTERS) (1)

+44%

COHORT GROWTH
OVER 6 YRS (4)

~2030

LEVEL-4 HORIZON (3)

Executive Summary

Three findings define the picture:

- ▶ **The market re-weights to AI.** Demand shifts from classical scenario testing to AI-assisted scenario generation; the addressed cohort grows +44% over six years ⁽⁴⁾.
- ▶ **AI scenario generation is white space.** Established test/simulation houses have not yet occupied this field — this is the greatest differentiation opportunity in the assessment model.
- ▶ **Regulation acts as a tailwind.** Tightened requirements for validation and safety evidence (ASIL-D, ASAM standards) increase the need for robust simulation ⁽²⁾⁽³⁾.

DERIVED FROM THE ANALYSIS (DEEP DIVE DISCIPLINE)

Three thrusts follow directly from the picture: an EU premium anchor over breadth, AI scenario automation as differentiation, regulation as a lever. They are flagged as derived from the Deep Dive — independent strategy development remains Advisory.

CHAPTER 02 · MARKET SIZE

TAM, SAM, SOM and the AI sub-markets

Market size is delineated along the TAM/SAM/SOM logic, complemented by the AI and sensor sub-markets that are decisive for the thesis. The percentages denote the assumed growth rate in each case; they come from the internal assessment model and are flagged as such.

Market level	Volume	Growth	Reading
TAM (total market)	€6.2bn	~16%	addressable total market

Market level	Volume	Growth	Reading
SAM (serviceable)	€2.8bn	~16%	high, realistically serviceable
SOM (obtainable)	€0.6bn	~16%	focus market
AI scenarios	€1.4bn	~19%	white-space sub-market
Sensor/data simulation	€1.1bn	~22%	fastest sub-market

Table 1 — Market delineation TAM/SAM/SOM plus AI/sensor sub-markets; internal model, flagged as a finding.

DATA TRANSPARENCY

The market sizes and growth rates stem from an internal Rivalerra model that triangulates public sources. They are estimates and flagged as a finding, not as audited market figures.

CHAPTER 03 · COMPETITIVE LANDSCAPE

Six archetype clusters

The 20 relevant competitors condense into six archetype clusters. What matters is where AI-native capabilities and differentiation potential coincide — and where established houses leave the white space open.

Cluster	Count	Differentiation potential	Finding
AI-native specialists	4	Very high	occupy the white space
OEM platforms (captive)	2	Medium	internally bound
Tier-1 / compute / sensors	5	Medium-High	infrastructure-strong
Established test/sim houses	3	Medium	AI gap
IT / engineering services	2	Low-Medium	broad, unfocused
Open / traffic-sim niches	4	Variable	fragmented

Table 2 — Competitive clusters; internal assessment model, brands anonymised.

KEY TAKEAWAY

The AI-native specialists are small in number but high in differentiation. The white space arises precisely where the established test/simulation houses do not occupy AI scenario generation.

CHAPTER 04 · STRENGTHS & RISKS

SWOT of the target position

The assessment of the intended position condenses into a SWOT logic. It orders the findings by impact and makes visible the tensions between differentiation and resource requirement.

Dimension	Key points	Character
Strengths	AI scenario generation, synthetic sensor data, ASIL-D determinism	differentiation
Weaknesses	narrow 3-OEM cohort, high R&D/compute cost, ASAM dependency	resource/concentration risk
Opportunities	+44% over 6 yrs, regulation, commercial-vehicle niche	demand tailwind
Risks	captive OEM platforms, Japan timing, AI-native iteration speed	competitive pressure

Table 3 — SWOT of the target position; internal assessment model.

KEY TAKEAWAY

The strengths lie precisely in the white space, the weaknesses in the narrow cohort and the resource requirement. The target position is viable, provided the concentration on a few premium OEMs is deliberately chosen.

CHAPTER 05 · REGULATION

The structural tailwind

Regulation is not a marginal factor but a structural demand lever. Tightened requirements for validation and safety evidence — in particular ASIL-D determinism and the ASAM standard family (OpenSCENARIO, OpenDRIVE) within ISO 26262 — increase the need for robust, reproducible simulation ⁽²⁾.

Regional timelines differ: the EU framework and the Level-4 horizon around 2030 set the pace, while timing in Japan is flagged as a risk ⁽³⁾. Whoever automates the regulatorily required depth of evidence with AI turns compliance burden into competitive advantage.

FINDING

Regulation acts as a tailwind for precisely the capability that defines the white space: AI-assisted, evidence-capable scenario generation. The lever is structural, not cyclical.

CHAPTER 06 · DERIVED THRUSTS

Three thrusts from the Deep Dive

The following three thrusts follow directly from the analysis. They are explicitly flagged as derived from the Deep Dive — elaboration into an independent strategy remains the subject of an Advisory engagement.

Thrust	Rationale from the analysis	Reference
EU premium anchor over breadth	narrow but high-quality cohort beats broad scatter	Ch. 03, 04
AI scenario automation	white space with ~19% growth, unoccupied by incumbents	Ch. 02, 03
Regulation as a lever	translate evidence obligation into an automated advantage	Ch. 05

Table 4 — Thrusts derived from the Deep Dive; no independent strategy development.

As a concrete next step, the analysis suggests a scoping with two to three EU premium OEMs plus an AI MVP for scenario automation — as a derived lever, not an elaborated strategy.

„The white space of ADAS/AD simulation belongs not to the broadest provider but to the one who masters AI-assisted evidence capability first.“

— Rivalerra Consulting, Technology & Mobility Intelligence

DEEP DIVE DISCIPLINE

These thrusts and the next step condense the analysis into concrete handles without elaborating them into a full strategy. Strategic prioritisation and implementation planning would be the scope of an Advisory engagement.

CHAPTER A · APPENDIX & SOURCES

Appendix

Methodology

The Deep Dive analyses the market for ADAS/AD test and simulation solutions along market size (TAM/SAM/SOM plus AI/sensor sub-markets), competitive clusters, SWOT and regulation. Market sizes and growth rates stem from an internal Rivalerra assessment model that triangulates public sources and are flagged as a finding/estimate, not as audited market figures. The case is anonymised. The Deep Dive package delivers the factual base and compact thrusts derived from the analysis — independent strategy development remains Advisory.

Sources

- ⁽¹⁾ Annual reports, whitepapers — OEM and competitor base (anonymised).
- ⁽²⁾ ASAM OpenSCENARIO/OpenDRIVE, ISO 26262 — standards, ASIL-D evidence.
- ⁽³⁾ Regulation EU/Japan — Level-4 horizon, regional timelines.
- ⁽⁴⁾ Rivalerra internal assessment model — market sizes, growth, clusters.

NOTE

Anonymised in-depth analysis based on publicly available data and an internal assessment model; no client-specific data. Market sizes and growth rates are estimates and flagged as a finding. Deep Dive deliverable — derived thrusts, not an independent strategy. As of July 2026.