DUCKER CARLISLE

Whitepaper

Growth beyond the machine

From services to data-enabled value: *how OEMs and Tier-1 suppliers can identify the value pools they can credibly win and scale*

October 2026

DUCKER CARLISLE

Contents

I **Executive Summary**

II **The new growth imperative**

Why narrowing machine differentiation, macro pressures, and stagnating sales shift growth from new vehicle sales to the installed base

III **Why capturing new value is harder than it seems**

Where value is migrating across six service domains, why maturity rarely meets margin, and which players have the right to win

IV **The risks of getting it wrong**

The strategic trade-offs, failure drivers, and breakdown points that cause attractive service models to underperform

V **Choosing the right growth model**

A five-pillar framework that separates attractive ideas from credible growth models, and how Ducker Carlisle supports the journey

VI **About Ducker Carlisle**

I. Executive Summary



With machine differentiation narrowing and asset lifecycles extending, future growth will be won in data-enabled value pools

Machine-led growth is under pressure

- **New vehicle and equipment sales remain below 2019** levels across Europe, while replacement cycles continue to lengthen.
- As core product features become more standardized, **machine differentiation alone is no longer sufficient to sustain growth or margins.**
- OEMs and Tier-1 suppliers must look **beyond the point of sale** to protect their long-term customer relevance.

Value is migrating across the asset lifecycle

- **Assets remain in operation for longer**, making uptime, total cost, and productivity of ownership more important to customers.
- **Value is shifting toward services** across uptime, fleet operations, data and AI, lifecycle management, advisory and ecosystem coordination.
- The **installed base is becoming a major source of revenue**, deeper customer engagement and competitive advantage.

Only credible, scalable service models will win

- The goal is not to offer more services, but to **prioritize where the customer problem and economic value are clear**.
- The ability to capture value depends on the **role in the ecosystem and the players' capabilities.**
- Winning models must be designed to scale through standardized delivery, channel alignment and the **right balance between ownership and partnerships.**

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To thrive from service ideas to credible growth models, it is critical for leaders to assess each service opportunity through 5 decisions

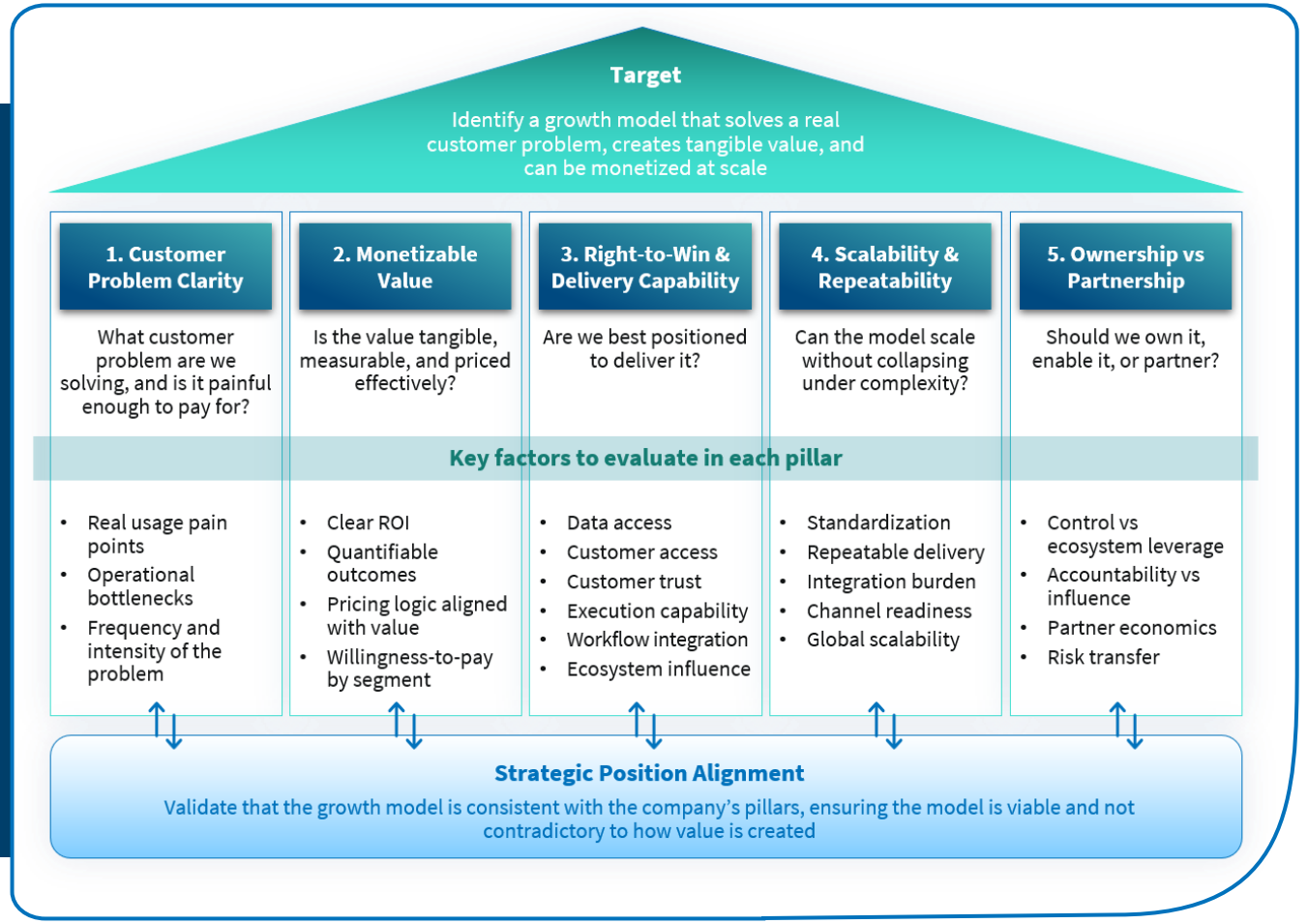
01.	**Customer Problem Clarity**	Anchor the offer in an operational disruption that customers will pay to solve . The strongest opportunities address recurring and costly pain points.
02.	**Monetizable Value**	Prove a measurable customer outcome, a clear ROI and a pricing model customers are willing to accept and renew.
03.	**Right-to-Win & Delivery Capability**	A strong idea is not enough. Win only where you have the required data, customer access, trust, delivery capability, workflow integration and ecosystem influence.
04.	**Scalability & Repeatability**	Standardize the offer, simplify implementation and enable the channel. If every deployment is custom-made, growth will erode margins.
05.	**Ownership vs Partnership**	Own when you control the data, customer relationship and delivery. Enable when you bring differentiated technology or data but lack delivery reach. Partnership when partners are essential to deliver the full customer outcome.

The right model reflects the capabilities each player controls and the accountability it can assume.

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Service growth succeeds not by chasing every value pool, but by choosing the ones a company can credibly win, scale, and execute

Ducker Carlisle has built a strategy framework to guide where and how to win, and support the full journey: **from insight to strategy to execution.**



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II. The new growth imperative

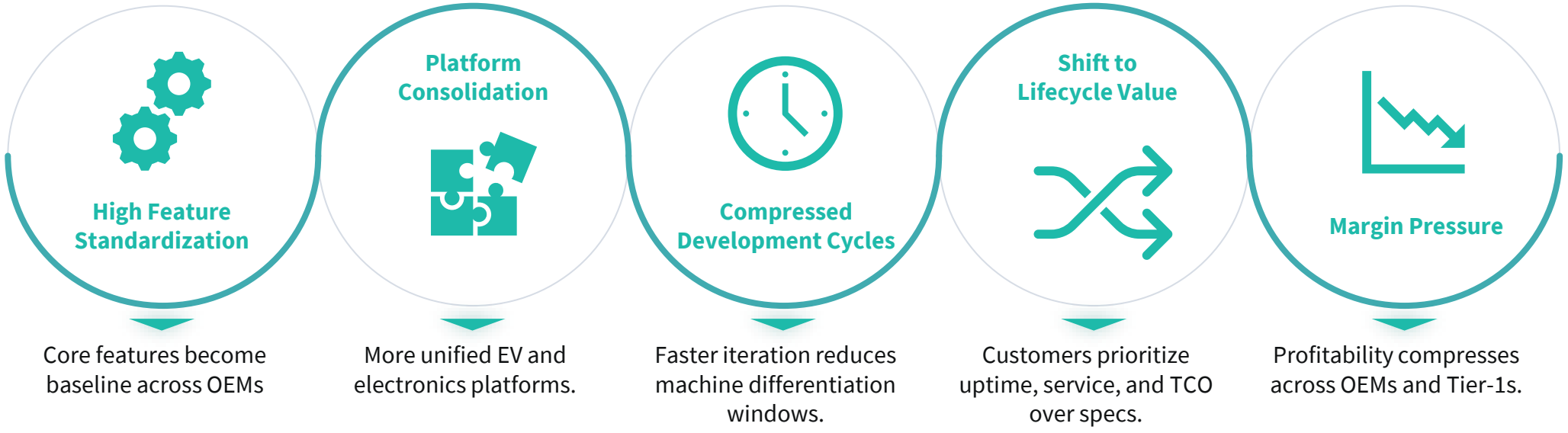


Industry-wide trends compress machine differentiation across all clusters, pushing the motor vehicle industry to a structural reset

As reviewed in the previous *European Vehicle* Markets Reset whitepaper, Europe's competitive landscape is undergoing a structural reset where vehicle differentiation is narrowing across the motor vehicle industry (on and off-road vehicles)

- Feature sets are increasingly standardized, platforms are consolidating around unified EV and electronics architectures, and development cycles are accelerating.
- These trends reduce the window in which machines can sustain competitive advantage, pushing OEMs and suppliers to compete on factors beyond machine specifications.

Cross-segment trends



Source: Secondary research

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Macro pressures are structurally weakening machine-based advantage

Europe's vehicle ecosystem faces a set of structural macro pressures: economic volatility, financing constraints, regulatory escalation, electrification investment and supply chain fragility. These forces affect each segment with different intensity, but all contribute to weakening machine economics and compressing margins across OEMs and suppliers.

Segment exposure to macro pressures

Drivers		Passenger Cars	Trucks & Buses	Construction, Agricultural & Material Handling	Tier-1 Suppliers
Economic volatility	Vehicle sales become cyclical and unpredictable, increasing reliance on services and uptime guarantees.	Demand swings reshape revenue mix	Fleet operators smooth cycles	Project-based dependency and others amplify volatility	OEM volume dependency
Capital & financing pressure	Vehicles are harder to finance, shifting value toward TCO optimization, fleet services, and lifecycle contracts.	Retail finance constraints	CAPEX-heavy fleets under pressure	Long-cycle equipment financing	CAPEX exposure
Regulatory escalation	Compliance costs rise faster than margins, pushing OEMs to differentiate through software, data, and service performance.	CO_2 reduction & safety mandates	CO_2 reduction & safety mandates	Procurement & emissions rules	Sourcing, content & compliance
Electrification & tech investment	EV platforms reduce machine differentiation, value shifts to charging, energy management, uptime, and digital services.	EV maturity reduces machine edge	Range & infrastructure gaps drive service needs	Electrification cost curve lag	Platform transitions reshape value
Supply chain disruptions	Availability becomes unstable, increasing demand for service continuity, predictive maintenance, and integrated solutions.	Components and batteries volatility	Components volatility push for predictive maintenance	Critical parts & long lead times	Multi-tier fragility

Exposure: High Medium Low

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Vehicle & equipment sales remain far below pre-pandemic levels, limiting revenue and margin growth

Across Europe, new registrations for passenger cars, vans, trucks, buses, construction equipment, material handling equipment and agricultural machinery remain significantly below 2019 levels.

This persistent gap reflects delayed investment cycles, higher financing costs and longer replacement intervals, indicating structural stagnation rather than a temporary slowdown.

New vehicle registrations in Europe (2025 vs 2019 Pre-pandemic)[1]

-21%

Passenger Cars

-7% vans
-17% trucks
-14% buses

Truck & Buses

-22% construction equip.
-25% agricultural tractors
-17% industrial trucks

Construction & Material Handling

With sales far below pre-pandemic levels and asset lifespan increasing, vehicles by themself can no longer sustain revenue and margin growth.

(1) ACEA, CECE, CEMA, FEM

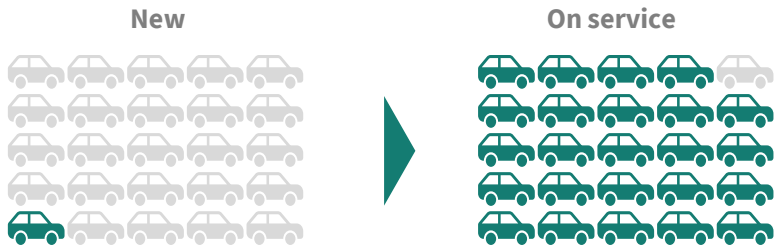
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Growth must shift from annual sales to monetizing the installed base across all the segments

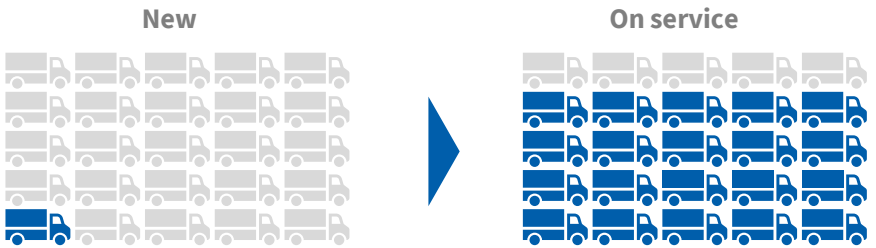
Europe's installed base continues to expand while replacement cycles lengthen.

- With more vehicles staying in operation for longer periods, the balance of value creation is shifting away from annual sales.
- OEMs and suppliers must increasingly focus on the operating life of assets, where uptime, productivity and lifecycle performance drive recurring revenue.

New vehicles sold vs vehicles on the road[(1)]



The European car parc has reached more than 256 million units.
For every new car sold annually, roughly 24 are already in operation.



The truck parc exceeds 6 million units, with average lifespans around 14 years.
For every new truck registered, nearly 20 remain in service.

The installed base is now a primary engine of competitive advantage. As assets remain in service for longer and customers prioritize uptime, productivity and lifecycle value, **OEMs and suppliers must redefine where value is created and where it is no longer sustained.**

(1) ACEA

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III. Why capturing new value is harder than it seems



A new service architecture is reshaping the industry, and it is redefining where value could be and is created

With machine advantages narrowing and operating lifecycles extending, OEMs and suppliers are accelerating a decisive shift toward service-centric architectures that create value across the full life of the asset. Six domains now define where value migrates.

Uptime & Technical Services	Maximize asset availability and minimize unplanned downtime
Fleet, Transport & Operational Management	Optimize daily operations and total cost of ownership
Logistics Coordination & Ecosystem Orchestration	Synchronize logistics flows and reduce ecosystem friction
Digital Optimization, Data & AI Services	Convert data into decisions, automation, and continuous improvement
Commercial, Financial & Lifecycle Services	Strengthen financial performance and lifecycle economics
Workforce, Safety & Strategic Advisory	Enhance human performance and guide strategic decision-making

Success is about investing in the services that deliver lasting value with manageable risk, rather than offering more services.

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A wide range of service offerings already exists across the six domains

Uptime & Technical Services

- Predictive maintenance alerts
- Remote equipment diagnostics
- Automated repair scheduling
- Guaranteed parts availability programs
- Real-time health monitoring dashboards
- Fixed-price service contracts

Fleet, Transport & Operational Management

- Vehicle telematics tracking
- Centralized fleet performance oversight
- Automated dispatch & assignment tools
- Route and load optimization engines
- EV charging, energy & alternative-fuel support
- Regulatory compliance workflow tools

Logistics Coordination & Ecosystem Orchestration

- Real-time logistics visibility platforms
- Automated event & (predictive) disruption alerts
- Incident response coordination tools
- Multi-party workflow orchestration
- Logistics marketplace integration, incl. real-time coordination across operations
- Carrier–OEM–dealer synchronization hubs

Digital Optimization, Data & AI Services

- Operational performance dashboards
- Predictive analytics for failures & demand
- AI-driven planning & scheduling
- Process automation modules
- Energy optimization & emissions reporting
- Data security & resilience analytics
- Open APIs & data integration with existing software

Commercial, Financial & Lifecycle Services

- Equipment leasing programs
- OEM-backed financing solutions
- Insurance & extended warranty products
- Lifecycle performance contracts
- Total cost of ownership optimization
- Residual value management tools
- Commercial advisory services

Workforce, Safety & Strategic Advisory

- Operator training & certification programs
- Safety compliance & monitoring systems
- Driver availability & workforce management
- Regulatory compliance dashboards
- ESG advisory & reporting support
- Network design consulting
- Digital transformation advisory

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Services differ sharply in maturity and value capture potential, and none fully occupy the high-value capture potential & high-maturity space

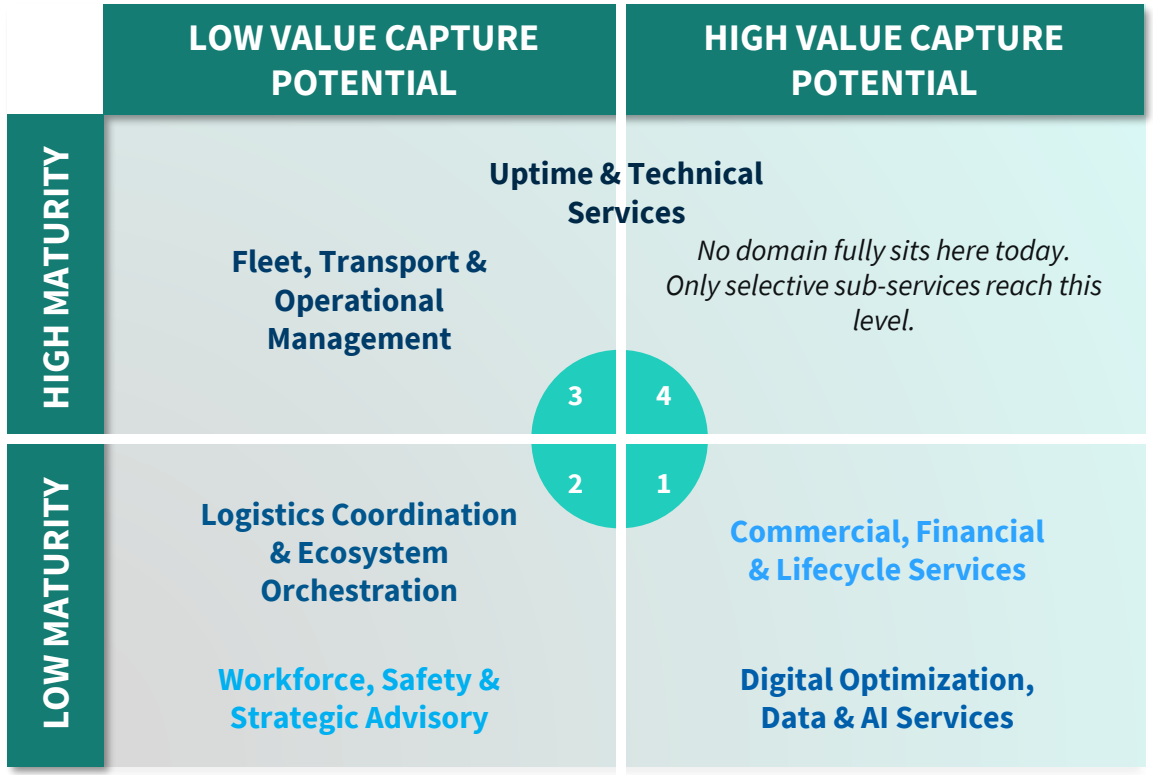
Value is not migrating evenly across the domains. The services that are easiest to implement are rarely the ones that create defensible value capture potential. The real opportunity lies in emerging profit pools, but they require capabilities that most OEMs and Tier-1s do not yet have.

1. **Low maturity / High value capture potential**
   Emerging profit pools with strong strategic control, higher defensibility, and better economics, but requiring capabilities most players still lack.

2. **Low maturity / Low value capture potential**
   Early-stage services with selective value, often dependent on partners, and not yet proven as scalable profit pools.

3. **High maturity / Low value capture potential**
   Services that are widely implemented and operationally essential, but structurally value capture potential-compressed due to competition, delivery cost, and limited differentiation.

4. **High maturity / High value capture potential**
   The strategic ideal, mature services with strong profitability. Few OEMs or Tier-1s have reached this quadrant at scale.



Directional hypothesis. Positions reflect general service performance. Actual outcomes vary by player capabilities.

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Examples of OEMs and Tier-1s that have successfully implemented service models

Real-time uptime monitoring

Where: OEM – Trucks

What/Why: Real-time monitoring that prevents breakdowns and maximizes fleet uptime

Enabling capability: Connected trucks, predictive analytics, and proactive dealer service

Proactive service & remote diagnostics

Where: OEM – Passenger Cars

What/Why: AI-based diagnostics detect service needs early, so the OEM/dealer proactively contacts customers before issues escalate

Enabling capability: Connected vehicle data, remote upgrades, and dealer integration

Smart Construction workflow integration

Where: OEM – Construction & Material Handling

What/Why: Site-wide digital workflows that accelerate project cycles and boost productivity

Enabling capability: Multi-actor orchestration, machine data integration and drone analytics

Lifecycle contracts & digital optimization

Where: OEM – Construction & Material Handling

What/Why: Lifecycle agreements that deliver measurable uptime and productivity gains

Enabling capability: Deep integration of telematics, analytics, and dealer execution

Digital fleet orchestration & predictive diagnostics

Where: Tier-1 – Passenger cars and Truck & Buses

What/Why: Digital fleet orchestration designed to improve fleet efficiency and vehicle availability

Enabling capability: Sensor-embedded components, and advanced analytics

Connected safety, ADAS & compliance services

Where: Tier-1 – Passenger cars and Truck & Buses

What/Why: Connected safety and fleet services that support driver safety and accident management

Enabling capability: Software, sensor fusion, and regulatory expertise

Based on public information.

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Not all players can win in every domain; structural advantage determines who captures value among the different players

Right-to-Win criteria

- **Data access.** Who controls the operating data a service relies on?
- **Customer access.** Who owns the interface where customers make decisions?
- **Customer trust.** Who do customers trust with operational decisions?
- **Execution capability.** Who has the field presence and processes to deliver?
- **Workflow integration.** Whose tools are embedded in customers' daily operations?
- **Ecosystem influence.** Who can align partners and set standards?

Building the capabilities required to win is the key challenge to scale services

Value Pool	Strongest Right-to-Win	Partial Right-to-Win	Limited Right-to-Win
Uptime & Technical Services	• **OEMs** • Dealers	• **Tier-1** • Fleet managers	• Software players • Independents
Fleet, Transport & Operational Management	• Fleet manager • Software players	• **OEMs** • **Tier-1**	• Dealers • Independents
Logistics Coordination & Ecosystem Orchestration	• Software players	• Fleet manager • Independents	• **OEMs** • **Tier-1** • Dealers
Digital Optimization, Data & AI Services	• Software players	• **OEMs** • **Tier-1**	• Dealers • Independents • Fleet managers
Commercial, Financial & Lifecycle Services	• **OEMs**	• Dealers • Fleet managers	• **Tier-1** • Software players • Independents
Workforce, Safety & Strategic Advisory	• **OEMs** • Independents • Software players	• **Tier-1**	• Dealers • Fleet managers

*__Independents__: Non-OEM, non-dealer companies that provide services such as maintenance, repairs, logistics, training, safety, compliance, or advisory.
*__Tier-1__ positioning varies materially by component category. Suppliers with direct access to asset-condition data and service touchpoints may have a stronger right-to-win in selected service domains.

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IV. The risks of getting it wrong



Moving beyond the machine forces six strategic trade-offs that companies often underestimate

Players must review these tensions to understand the strategic choices each one forces, and the risks of choosing one side over the other. Ignoring them is the root cause of most service failures.

	The decision	The risk
1 Revenue growth vs margin quality	Pursue growth at the cost of profitability, or slow down growth to protect margin	Revenue grows while profitability lags, as delivery and adoption costs scale faster
2 Customer intimacy vs channel conflict	Strengthen intimacy going direct to customers or preserve channel harmony	Alienating dealers and service partners who deliver most of the service execution
3 Control vs ecosystem dependence	Build full control or orchestrate an ecosystem with partners	Owning accountability without owning the levers needed to deliver outcomes
4 Customization vs scalability	Customize to win key accounts or standardize to scale globally	Creating a portfolio of bespoke offers that cannot be industrialized
5 Differentiation vs organizational complexity	Expand the portfolio or simplify to protect execution	Building a service catalog the organization cannot deliver consistently
6 Short-term monetization vs long-term positioning	Prioritize immediate monetization or invest in long-term capability	Chasing near-term revenue while missing the strategic profit pools

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Understanding where strategies break down is essential before choosing a strategic position and a growth model

Most failures occur not in the idea, but in the execution chain. Three breakdown points explain most cases of service underperformance:

Strategy - Ambition beyond right-to-win

Leaders expand into adjacent spaces that require capabilities, data access, or ecosystem control they do not have.
Impact: strategy collapses before launch.

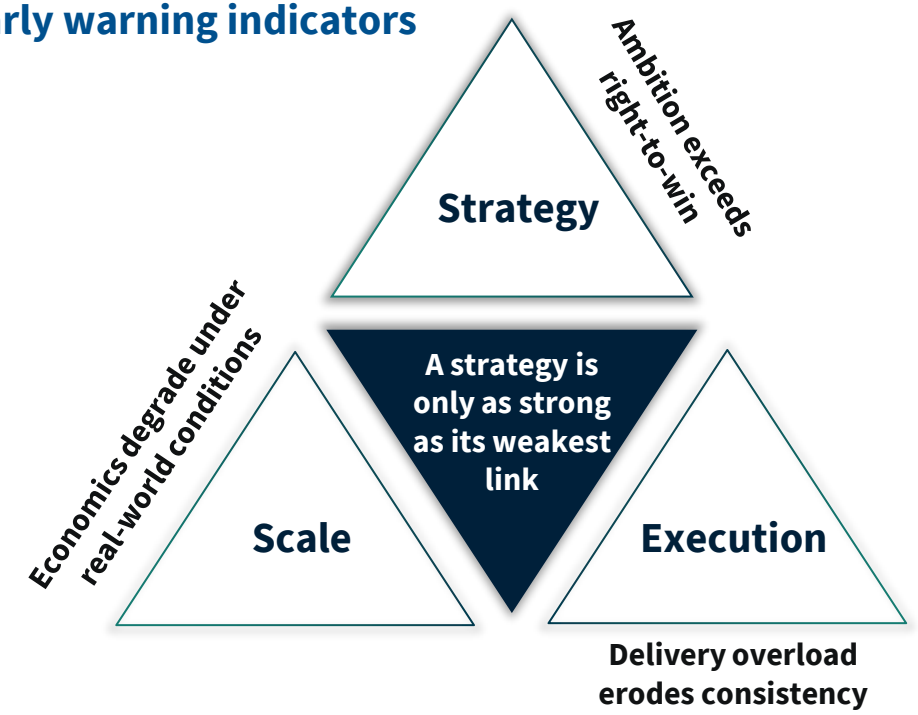
Execution - Delivery overstretched

Organizations try to scale too many services at once, stretching delivery, engineering, and dealer networks.
Impact: inconsistent execution erodes trust and retention.

Scale - Economics underestimated

Service economics degrade over time due to customization, support cost, and channel friction.
Impact: services grow in volume but destroy margin.

Early warning indicators



Identifying breakdowns early is the foundation for choosing a strategic position and a growth model that will generate value and scale.

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Early and rigorous risk identification is a critical safeguard against strategic collapse and value erosion

When the breakdown point is identified, early risk identification and mitigation are required to ensure the strategic position and growth model are grounded in reality. Most common risks are listed below.

Ambition beyond right-to-win

Overestimated data monetization

Data creates value only when it improves a decision or outcome

Valued but not paid for

Customers appreciate the service but expect it as standard, not as a paid offer

One model for all segments

The same offer is pushed across segments with different needs and willingness to pay

Economics underestimated

High delivery cost structures

Delivery costs scale faster than revenue, compressing margins early

Slow and uncertain profitability

Services look profitable in business cases but underperform in real P&L cycles

Non-scalable customization

Every deployment becomes a tailor-made project that cannot scale

Delivery overstretched

Adoption & change burden

Adoption becomes the bottleneck, driving high cost and slow scale-up

Channel misalignment

Dealers and service partners lack the skills or incentives to deliver new services

Capability gaps in execution

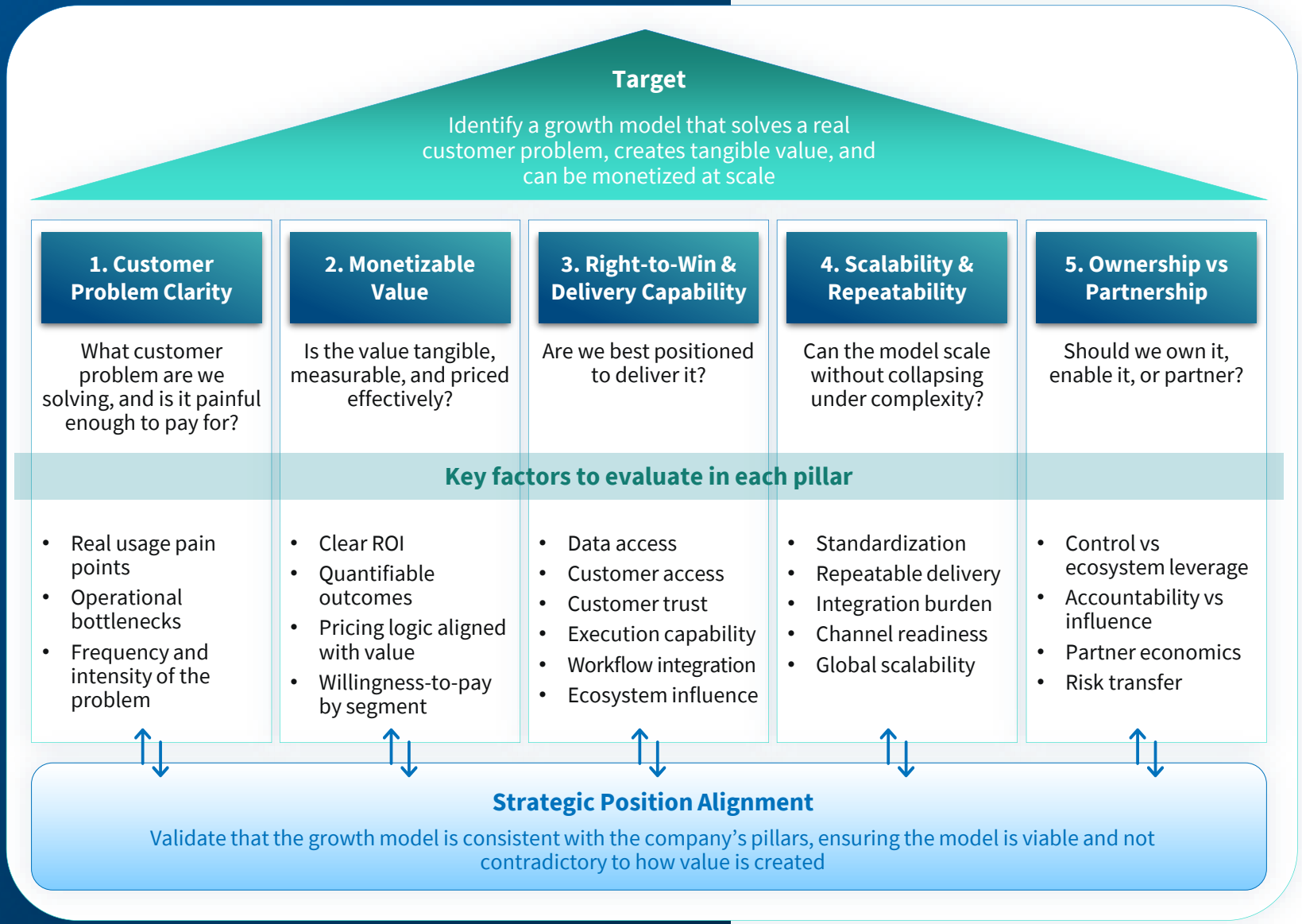
Software, analytics, and service delivery capabilities lag behind the service promise

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V. Choosing the right growth model

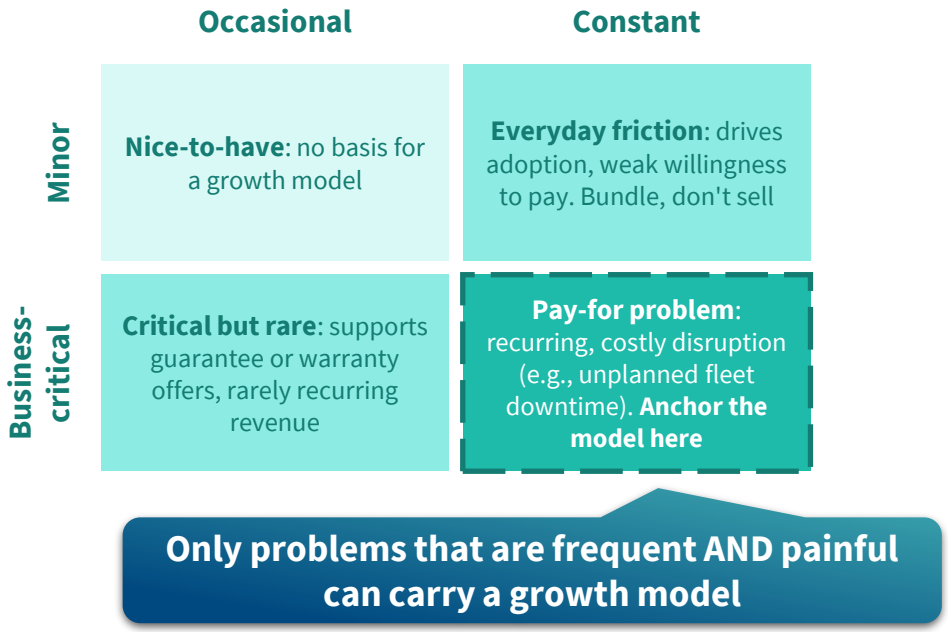


This framework separates attractive ideas from credible growth models and clarifies where we can help leaders build strategies and turn them into action.



1. Customer Problem Clarity

What customer problem are we solving, and is it painful enough to pay for?



Red flag: Vague or low-intensity problem, causing the model not to scale, regardless of technology or ambition.

How Ducker Carlisle can support your strategy:

Customer Problem Mapping

- Reveals the problems that truly matter and prevents investment in solutions that don’t solve meaningful issues.

Voice-of-Customer Deep Dive

- Pinpoints the segments with the strongest needs and highest willingness to adopt new services.

Concept Development & Value Proposition

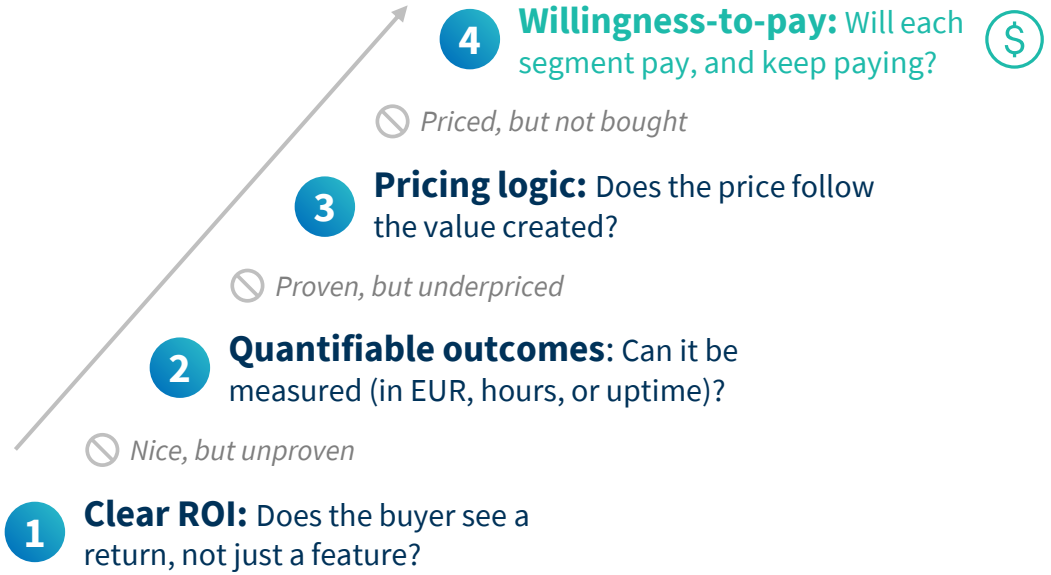
- Uses customer input to shape the solution and test whether the value proposition resonates before investing.

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2. Monetizable Value

Is the value tangible, measurable, and priced effectively?

Value only pays off once it climbs every step



Red flag: No monetizable value causing the service to become a cost center, even if customers like it.

How Ducker Carlisle can support your strategy:

Value Proposition Stress-Test

- Ensures the value story is compelling enough to support monetization before investing in the model.

Pricing Architecture Design

- Defines tiered, bundled, or outcome-based pricing aligned with customer economics.

Willingness-to-Pay Study

- Validates what customers will pay and why, across segments and use cases.

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3. Right-to-Win & Delivery Capability

Are we best positioned to deliver it?

- **Data access**: Do we control or access the operating data the service needs?
- **Customer access:** Do we own the interface where decisions are made? Do we reach the decision-makers directly?
- **Customer trust:** Do customers trust us to operate, advise, or make critical decisions?
- **Execution capability:** Can we deliver reliably, consistently, at scale?
- **Workflow integration:** Are we embedded in the customers' daily operations?
- **Ecosystem influence:** Can we shape partners, dealers, and standards?

Right-to-win is only as strong as its weakest link

Red flag: Weak right-to-win, leaving room for competitors to capture the value, even with a strong idea.

How Ducker Carlisle can support your strategy:

Right-to-Win Diagnostics
- Evaluates data, access, influence, and control across the ecosystem

Capability Gap Assessment and Benchmark
- Identifies gaps in software, analytics, delivery, and dealer readiness

Customer Journey Mapping and Integration
- Clarifies how the model fits into customer operations and where capability must be built

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4. Scalability & Repeatability

Can the model scale without collapsing under complexity?

	Breaks at scale	Scales
Standardization *Can customers buy it off the shelf?*	Offer tailored for every customer	Standard packages customers choose from
Delivery repeatability *Does it work without the experts?*	Depends on a few experts	Defined process any trained team can run
Integration burden *How easy is it to get started?*	Heavy set-up effort per customer	Fits customers' existing systems and routines
Channel readiness *Can and will partners deliver it?*	Channel partners lack skills or incentives	Channel partners trained, equipped, and paid to deliver
Global scalability *Does it work in every market?*	Rebuilt market by market	One model, adapted only where required

If every deployment is a project, the service never becomes a business

Red flag: Low scalability causing economics to drift and margins to collapse.

How Ducker Carlisle can support your strategy:

Go-to-Market Model Design

- Creates a repeatable delivery engine and eliminates tailor-made deployments

Integration Burden Assessment

- Evaluates how much effort customers and dealers must invest to adopt and operate the service

Channel Enablement Roadmap

- Define the capabilities, incentives, and workflows dealers need to deliver consistently

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5. Ownership vs Partnership

Should we own it, enable it, or partner?

	OWN End-to-end delivery in-house	ENABLE Provision of data, platform or components	ORCHESTRATE Coordination of partners around the customer
Control			
Accountability for outcome			
Share of value captured			
Risk retained			
Best fit when	Strong right-to-win across data, access & delivery	Strong tech or data position, limited delivery reach	Strong customer access, gaps closed by partners

There is no default model.
The right logic follows capability and control



Red flag: Wrong ownership logic leads to misalignment, cost, and execution risk.



How Ducker Carlisle can support your strategy:

Benchmark & Market Landscape Assessment

- Assesses how the industry structures and delivers similar services to identify credible and competitive paths forward

Ownership Logic Assessment

- Assesses whether the company should own, enable, or partner based on capability and control

Partner Selection Framework

- Identifies and evaluates potential partners across capability, economics, and influence

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Service growth succeeds not by chasing every value pool, but by choosing the ones a company can credibly win, scale, and execute

Where to win is decided pillar by pillar. A credible growth model solves a real customer problem, creates value customers pay for, builds on a true right-to-win, scales without margin drift, and follows the right ownership logic. Skip one test, and investment flows into models that cannot deliver.

How Ducker Carlisle supports your strategy

Strategic Positioning & Where-to-Play Definition

We help leaders define the strategic plays they can credibly win – based on right-to-win, customer economics, and ecosystem dynamics.

Risk & Execution Readiness Assessment

We identify structural, operational, and ecosystem risks early, ensuring the growth model is viable before scaling.

End-to-End Strategy Design

We translate insights from the framework into a clear, actionable strategy – with the sequencing, capabilities, and partnerships required.

This framework is the **foundation for choosing where and how to win**.
Ducker Carlisle supports the full journey: from insight to strategy to execution.

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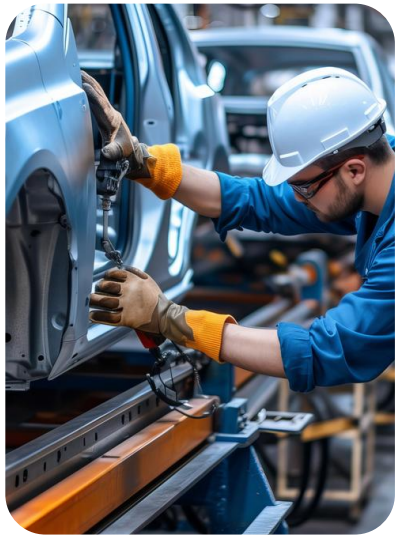
VI. About Ducker Carlisle



DEEP END-MARKET EXPERTISE

We tackle the challenges of complex industrial markets and deliver the clarity our clients need to grow. We bring decades of sector knowledge, tenured teams, and proven methodologies, translating deep expertise into tailored strategies that drive outcomes for our clients.

Our focus industries share defining characteristics: technical complexity, sophisticated buyer relationships, and sectors undergoing transformation through electrification, AI, and supply chain realignment, precisely where DC's depth creates lasting advantage.



AUTOMOTIVE & MOTOR VEHICLE



BUILDING, CONSTRUCTION & INFRASTRUCTURE



HEAVY TRUCK & EQUIPMENT



INDUSTRIAL AUTOMATION



PRIVATE EQUITY

GLOBAL FOOTPRINT + SCALE

We operate across three continents with offices in every major industrial market. Our global footprint means we deploy quickly, engage local expert networks, and bring sector-specific intelligence to every market we cover - wherever our clients need to grow, compete, or transact.

60+
YEARS OF EXPERIENCE

350+
ANNUAL ENGAGEMENTS

10,000
PROPRIETARY DATA POINTS

~200
CONSULTANTS WORLDWIDE



NORTH AMERICA
Troy, Michigan (Global HQ) | Boston, Massachusetts



EUROPE
Lisbon, Portugal I Munich, Germany | Paris, France



ASIA-PACIFIC
Bengaluru, India | New Delhi, India | Shanghai, China

OUR FULL CONSULTING CONTINUUM

We guide our clients through every stage of their journey — with insights to action. Our integrated consulting approach combines market intelligence, strategic insight and hands-on implementation to unlock opportunities — whether you're looking to grow, optimize, transform, buy or sell.

+ ORGANIC GROWTH

+ BUSINESS IMPROVEMENT

+ INORGANIC GROWTH



STRATEGY & MARKET INTELLIGENCE

We define growth strategies and identify new market opportunities through deep industry insight, analytics and strategic frameworks.



INSIGHTS & BENCHMARKS

We turn data into direction – using proprietary benchmarks and performance analytics to drive better business decisions.



BUSINESS PERFORMANCE & TRANSFORMATION

We help clients optimize structures, supply chains and commercial processes to achieve measurable performance gains.



MERGERS & ACQUISITIONS

We guide clients through the full deal cycle – from target screening and due diligence to post-merger integration and value creation.

MOTOR VEHICLE

Our international Motor Vehicle Team combines deep industry expertise with strategic and operational excellence. We support global automotive and transportation companies get products to market faster, increase content by platform and build strong Tier-OEM relationships.

Building on a proven track record in custom research, consulting and M&A transaction support, our team combines analytical precision, an entrepreneurial mindset and hands-on collaboration to help our clients improve customer experience, disrupt the market and outperform the competition.



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