

Software as a driver of innovation and differentiation in the SDV era



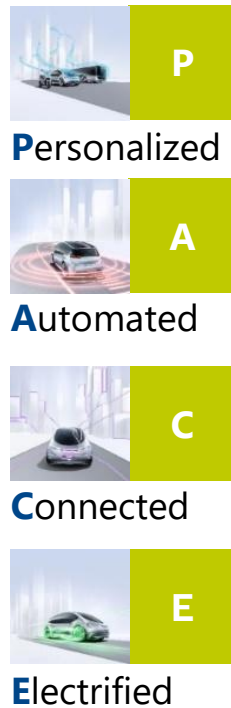
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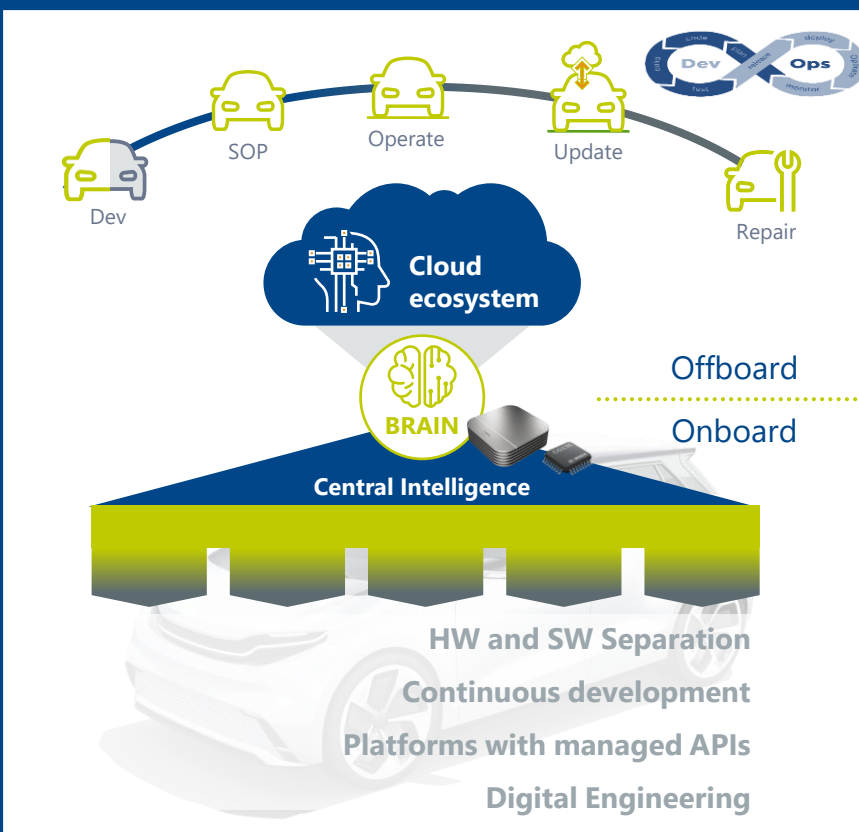
SOFTWARE DEFINED VEHICLE

SOFTWARE AS A DRIVER OF INNOVATION AND DIFFERENTIATION

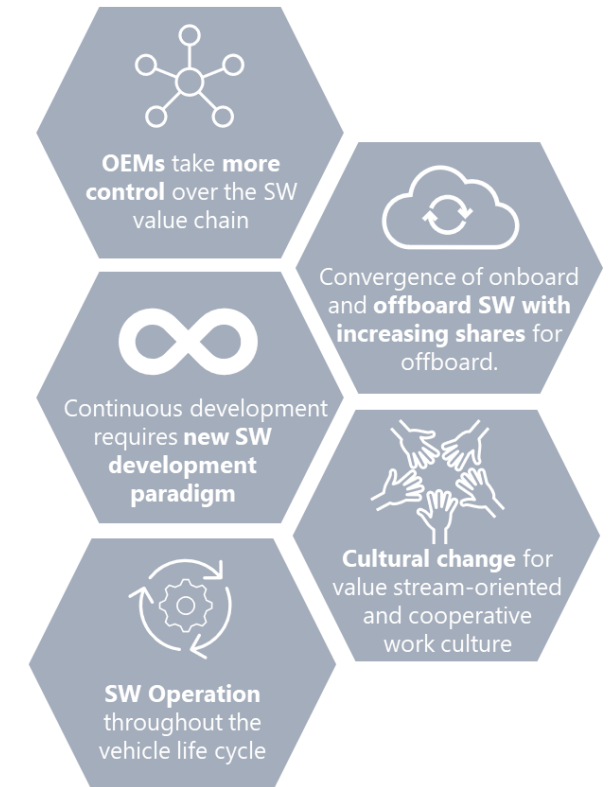
What drives the transformation?



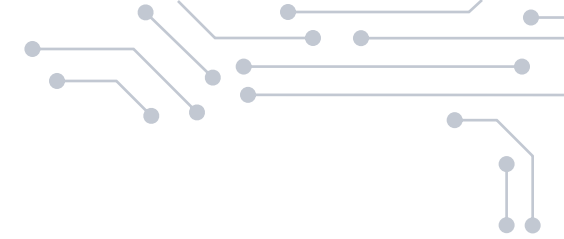
SdV | Vehicles that can **evolve** throughout its life cycle:
It changes its key features **by changing software** onboard and offboard



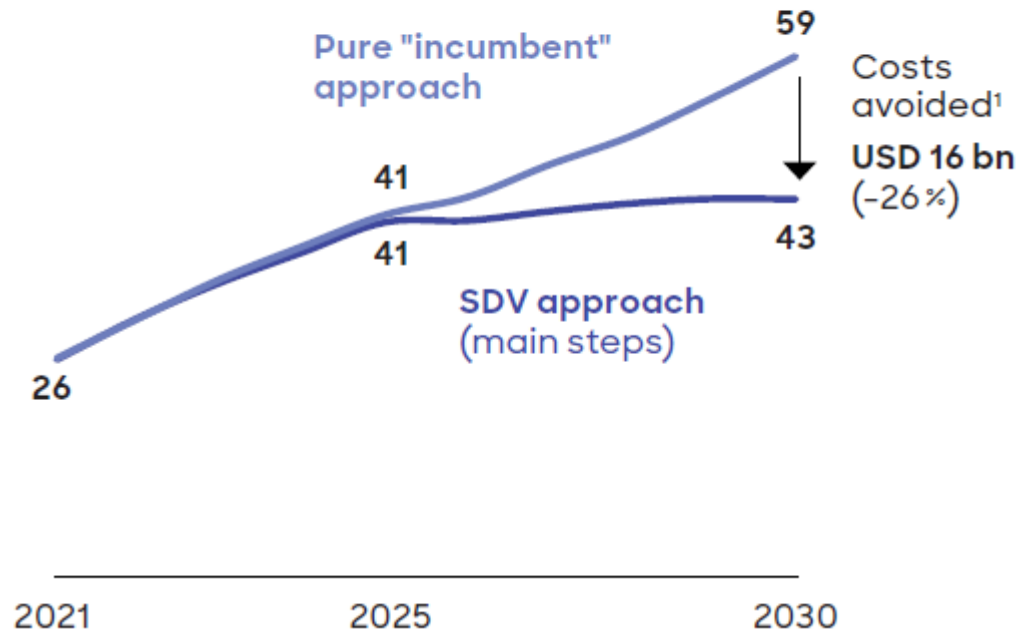
What are typical challenges?



CHALLENGES AND OPPORTUNITIES



OEM automotive software spending forecast, 2021-2030
[USD bn]



OEMs will spend 43 billion dollars a year on automotive software by 2030.

Key attributes of software-defined vehicles

- Always "new"
- App store on wheels
- 3rd, 4th, 5th screen
- Always connected
- Enhanced safety
- Improved efficiency
- Enhanced personalization

Source: Roland Berger Global Automotive Supplier Study 2025



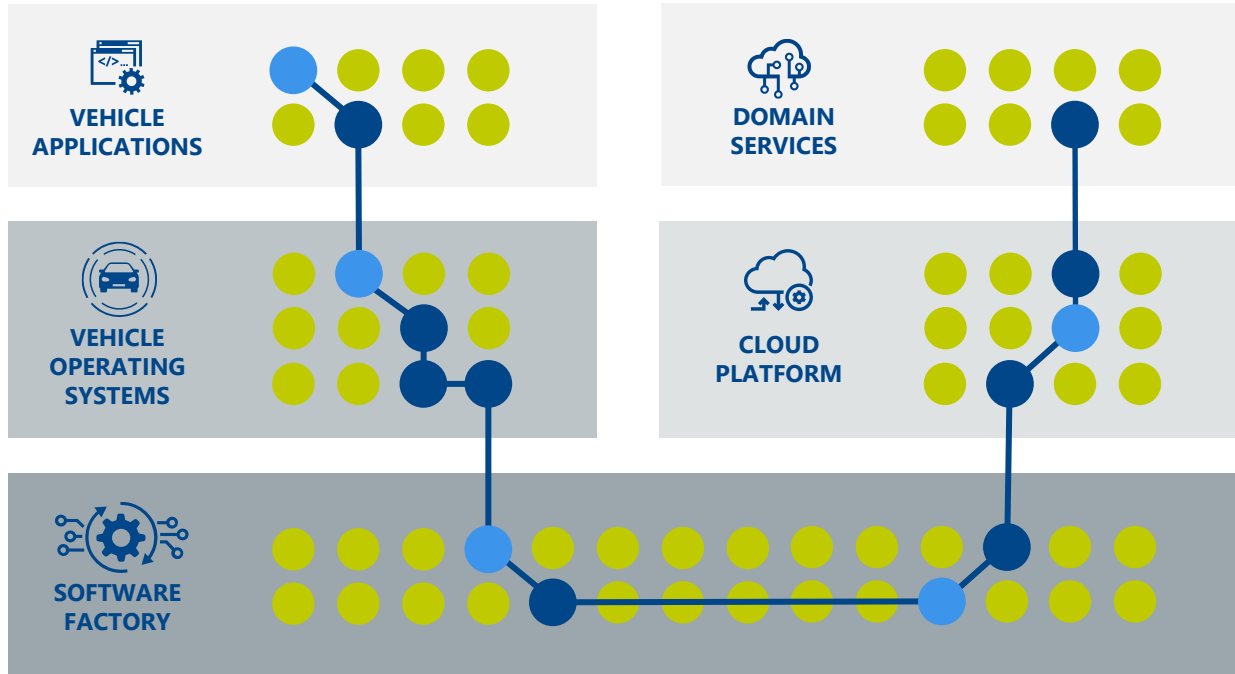
Access

Convenient

此功能支持的停车场、具体开通及收费办法以官方通知为准。
此功能需要通过 OTA 升级获得，具体以实际产品交付及官方通知为准。
此功能是在智驾模式下车辆根据系统规划的路线在停车场内行驶，驾驶员需时刻关注手机泊车代驾界面中车辆的行驶过程，并时刻保持必要的注意义务，根据车辆周边环境及时予以干预。驾驶员依然是驾驶主体并对车辆行驶过程中的一切行为负责。
广告创意中视频所展示的车辆信息（外观、内饰、色彩）和功能界面等，可能与最终量产车型存在差异，请以实际销售车型为准。

FROM VEHICLE TO CLOUD

WE CONNECT THE DOTS FOR YOUR SW DEFINED VEHICLE



The essential areas to accelerate innovation with new software features

1. Vehicle Operating System

- Standardized, robust, and easy-to-use APIs with reliable runtime environments.

2. Offboard Platform

- Cloud native applications, deep learning loops, data collection, etc.

3. SW Factory

- The SW Factory streamlines the software value stream in an automated manner to facilitate efficient and collaborative development in a cloud-based environment.

Architect >> Build & Integrate >> Operate



SW FACTORY AND INTEGRATION SERVICES

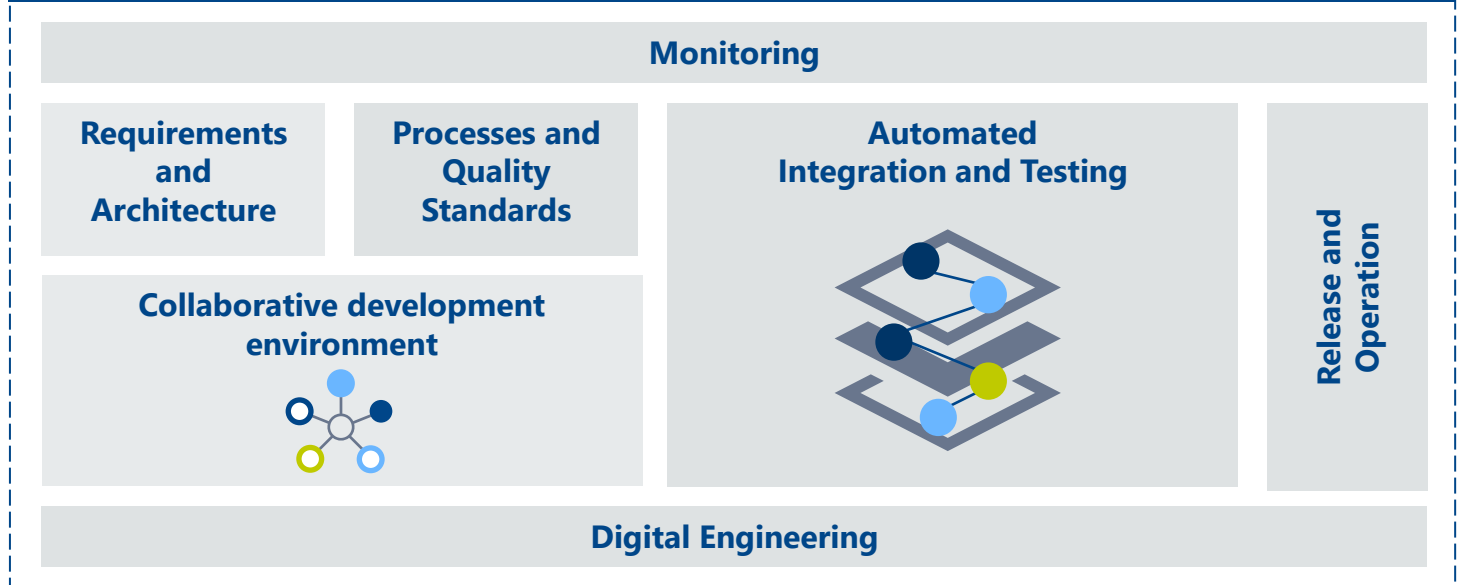
INDEPENDENT INTEGRATION PARTNER – WE ENABLE NEUTRAL GROUND

SW Factory: Tailor-made SW Factory to streamline your SW development value stream with automation and AI Assisted Engineering

Integration Partner: Independent and scalable integration partner providing a neutral ground with strict separation of 3rd party IP to enable multiparty collaboration

Digital Engineering: Deep methodological expertise with DevOps culture – that is our foundation to streamline your development

SW FACTORY – Seamless Integrated Development Platform



Streamlining your SW development value stream with a holistic development environment



GERMANY × JAPAN: ENGINEERING ACROSS BORDERS

JOINT ENGINEERING

From complementary strengths to joint innovation

- Germany: Systems & Software Engineering, Safety & Engineering Methods
- Japan: Customer & Automotive Expertise, Quality & Manufacturing

Connect

Germany + Japan + customers + partners

Integrate

Bridge organizations, technologies and cultures. OEMs, suppliers and engineering partners working as one development ecosystem.

Differentiate

Turning software capabilities into customer value and unique vehicle experiences.

Key Takeaways

- Software is becoming the key driver of innovation and differentiation.
- SDV requires collaboration – across companies, disciplines and countries.
- Germany and Japan can combine complementary strengths to accelerate this transformation.

Software may define the vehicle. Engineering makes it real.

ありがとうございます



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