

AI-DRIVEN SOFTWARE-DEFINED VEHICLES

FROM PLATFORM STRATEGY
TO REAL CUSTOMER VALUE

THE RULES HAVE CHANGED

Smaller margins.
Faster competitors.
Higher expectations.



More competitors
New players. New business models.



Faster innovation cycles
Technology evolves at digital speed.



Rising customer expectations
Seamless, intelligent, always-on.



Business model pressure
Value shifts. Margin shrink.



The benchmark is no longer another car.
It's the best digital experience
customers had anywhere.

SDV IS THE FOUNDATION. NOT THE PRODUCT.

Technology enables. Customer value wins.



Applications
Apps & Services



Platform
Middleware & APIs



Core Software
OS & Vehicle Software



Data & AI
Models & Intelligence



Hardware
Compute & sensors



**SEAMLESS
INTEGRATION**
Everything works
together.



**SIMPLICITY
WINS ADOPTION**
Intuitive. Effortless.
Instant value.



**REAL UTILITY
CREATES VALUE**
Driving engagement.
Enabling recurring
revenue.



OWN WHAT DIFFERENTIATES YOU. PARTNER WHERE SCALE MATTERS.



OWN WHAT DIFFERENTIATES YOU.



CUSTOMER EXPERIENCE



VEHICLE INTELLIGENCE



SAFETY-CRITICAL
DECISION LAYERS



BRAND RELATIONSHIP



DATA & DOMAIN EXPERTISE



SYSTEM ORCHESTRATION

FOCUS
WHERE YOU
CREATE
UNIQUE
VALUE.



PARTNER WHERE SCALE MATTERS.



FOUNDATION MODELS



CLOUD INFRASTRUCTURE



AI TOOLING



CONTENT ECOSYSTEMS



COMMERCE & PAYMENTS



SPECIALIZED
DIGITAL SERVICES

USER EXPERIENCE STARTS BEFORE THE DOOR OPENS.

The vehicle is just one touchpoint in a broader customer journey



If customer experience starts only when someone sits in the vehicle, we're already too late. The real journey starts with **intent**, **planning**, **context**, and **orchestration** across touchpoints.

CARS ARE NO LONGER JUST PRODUCTS.

THEY ARE BECOMING
CONTINUOUS
SERVICE ECOSYSTEMS.



**TRANSACTIONAL
REVENUE**

Product-Centric



**CONTINUOUS
CUSTOMER VALUE**

Continuous.
Relationship-driven.
Ecosystem-powered.



Subscriptions



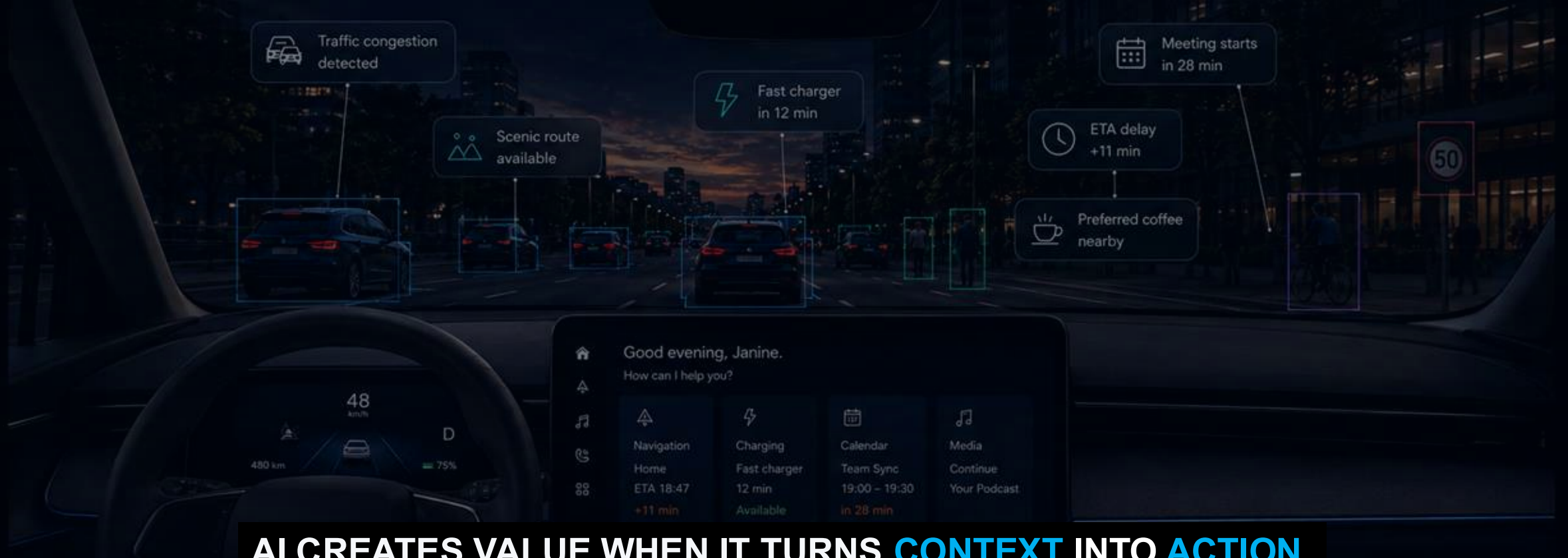
Services



Digital Experiences



Data & Insights



AI CREATES VALUE WHEN IT TURNS **CONTEXT** INTO **ACTION**.



1. PERCEIVE

AI sees the world in real time.



2. UNDERSTAND

AI understands what matters.



3. PREDICT

AI anticipates what you need.



4. ACT

AI takes action on your behalf.



Sensors



Environment



Vehicle



People



Signals



Context



Intent



Constraints



Preferences



Needs



Risks



Opportunities



Impact



Assist



Automate

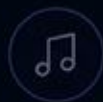


Orchestrate



SIMPLIFY EVERY DRIVE

Less friction. More clarity.



MORE ENTERTAINMENT

Right content. Right time.



PERSONAL ASSISTANCE

Proactive. Relevant.
Helpful.



PRIVACY BY DESIGN

You're in control of
your data.



SAFE & RELIABLE

AI supports you –
you stay in control.

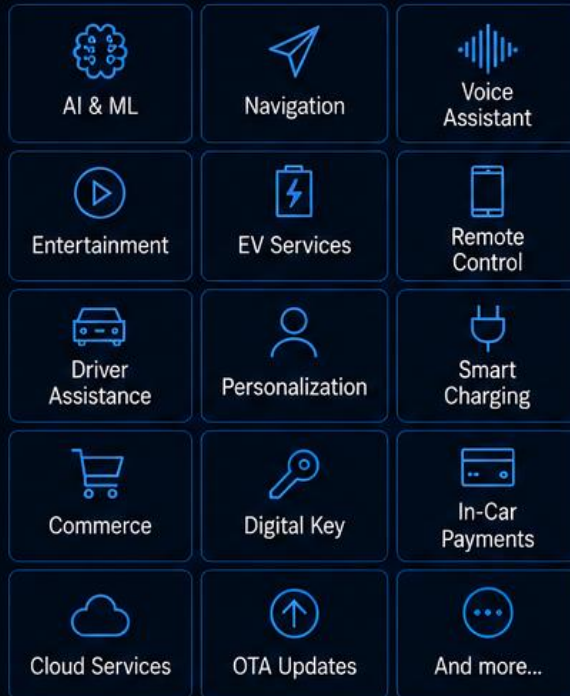
THE REAL CHALLENGE ISN'T BUILDING. IT'S **INTEGRATION** AND **USER ADOPTION**.

TECHNOLOGY EXISTS. VALUE HAPPENS WHEN IT ALL WORKS TOGETHER—AND WHEN CUSTOMERS USE IT.



CAPABILITY DEVELOPMENT

Many capabilities can be developed.



multiple

CAPABILITIES ACROSS THE STACK



ECOSYSTEM INTEGRATION

Hardware & software evolve at different speeds.
Different development cycles create integration friction.



HARDWARE & SOFTWARE
DEVELOPMENT REQUIRE SYNCHRONIZATION.



USER ADOPTION

From availability to habit.
A steep drop-off at every step.



Illustrative adoption funnel

Illustrative example. Actual activation rates vary by feature, user segment and ecosystem.



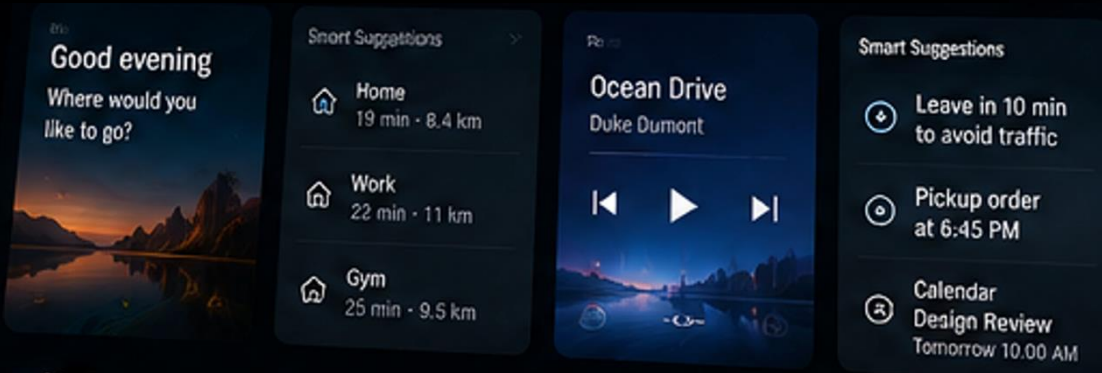
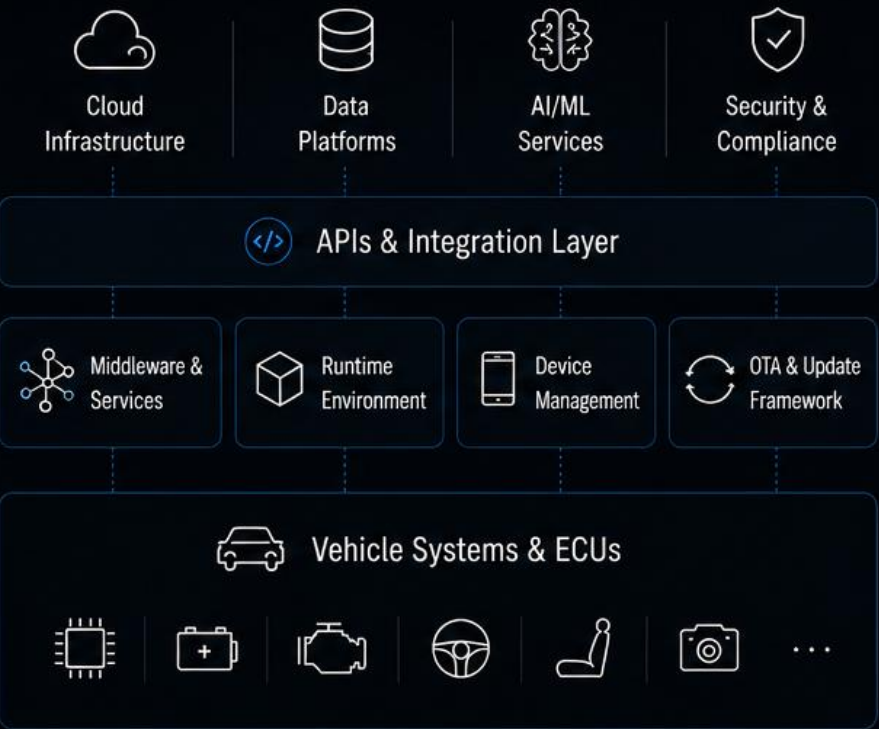
CUSTOMER VALUE STARTS WHERE **ACTIVATION BEGINS.**

THE STACK ENABLES THE PRODUCT.

THE EXPERIENCE DEFINES THE BRAND.

PLATFORM ARCHITECTURE

Critical. Invisible.



Illustrative mockup UI



Conceptual illustration / non-proprietary



ARCHITECTURE ENABLES EXPERIENCE. EXPERIENCE CREATES LOYALTY.

**THE VEHICLE IS
NO LONGER THE
FINISH LINE.**

**IT'S WHERE THE
RELATIONSHIP BEGINS.**

