

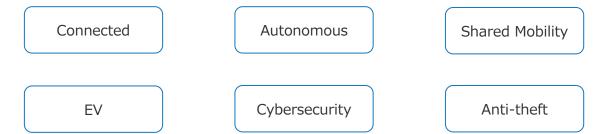
SBD

April 2025
Auto Shanghai 2025 Flash Report
21st Shanghai International Automobile Industry Exhibition

About SBD Automotive

Management & technology consultants to the automotive industry for over 20 years

Our expertise:



Our role:





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3000C - Auto Shanghai 2025 Flash Report

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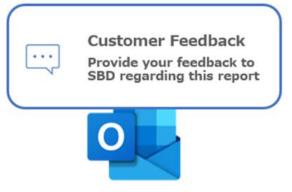
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Introduction to Auto Shanghai 2025

Introduction to, and highlights of, Auto Shanghai 2025



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The 21st Shanghai International Automobile Industry Exhibition

Introduction and background to Auto Shanghai 2025

The 21st Shanghai International Automobile Industry Exhibition is the most anticipated A-class auto show in China in 2025. With the theme of "Embrace Innovation, Win the Future Together", it focuses on displaying the innovative development achievements of the world's automobile industry. Among them, more than 100 new cars are launched globally, there are many concept cars, and new energy models account for more than 70%.

In the context of changes in the automobile industry, consumers have put forward higher requirements for automobile intelligence and new energy vehicle endurance, and cross-border cooperation in chips and batteries has become an important force in promoting the rapid development of the automobile industry. At this Shanghai Auto Show, chip, battery and other industry chain companies will also participate in the exhibition.

Themes from previous years of Shanghai Auto Show



2019

Co-create a better life

2020

Leading the future Embrace change with intelligence



2021

2022

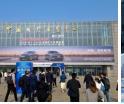


2023

Embrace new era

of automobile

industry





2024

New era new cars

2025

Embrace innovation



SBD Premium Event Reports

The SBD Premium Event Report series takes an analytical deep dive into three global events that deliver major implications for the automotive industry. While differentiating between announcements that represent concepts and production commitments, a Pre-Show report for each event tracks its most important pre-announcements and what to expect on the show floor

Learn more



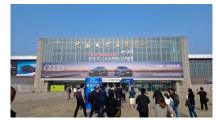


How does Auto Shanghai 2025 compare to previous years?











			200			
	2020	2021	2022	2023	2024	2025*
Exhibition theme	Leading the Future with Intelligence	Embrace change		Embrace the new era of automobile industry	New Era New Cars	Embrace innovation, win the future
Number of visitors	530K	810k		906k	892k	>1000K
Number of automobile exhibitors	1000+	1000		1000+	1500+	1000+
Exhibition highlights	 FoD services start to gain prominence. AR technology is integrated into vehicles. HD-maps are integrated into vehicles. Advanced driving assistance features are integrated into vehicles. Battery swapping becomes a new business model in the battery industry. 	 UWB technology is ready to be applied in cars OTA update has gradually become mainstream OEMs began to introduce AVP AR HUD seen on cars Technology companies strengthen cooperation with OEMs Individual models began to carry Lidar 	Cancelled due to COVID-19 Pandemic	The application of light has emerged The first year of mass production of electronic exterior rearview mirror In-vehicle health becomes hot topic, and many solutions have landed AI continues to penetrate (wallpaper, recommendation, intelligent dialogue system) Layout competition of charging network Urban pilot driving largescale launch	 The large language model further enhances the intelligence of the cabin. The penetration rate of AR-HUD increases. The control authority of the driver's seat is further delegated to the rear seat screens. The penetration rate of electronic exterior rearview mirrors gradually increases. Digital chassis begins to emerge. Integrated cabin and ADAS domain controllers may become mainstream. The penetration rate of 800V high-voltage platforms is rising, while the prices of equipped models continue to decline. The layout of charging networks continues to expand. End-to-end large models are being implemented. 	 VPA Upgrade, AI Continues to Provide Enhancement Multi-Screen trend Continues & Adds New Techs Cockpit Ecosystem Expands Further The rise of centralized architectures Addressing EV charging key challenges New standards drive battery safety Lidar Solution vs Pure Vision Solution Large language models contribute to the development of SAE L3/L4





OEMs booths - page 1

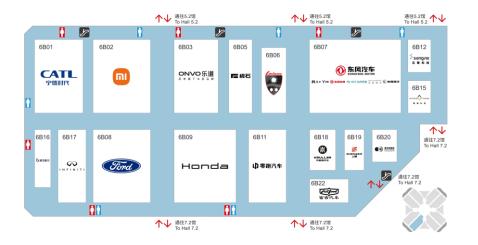














OEMs booths - page 2





↑↓ 通往5.1馆 To Hall 5.1

↑↓ 通往5.1馆 To Hall 5.1







Supplier booths











8.2H 平面图





Key Insights

Key insights from Auto Shanghai 2025



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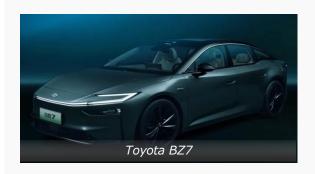


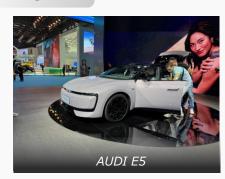
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Key Insights: Joint ventures and oversees expansion

Joint Ventures Catching Quickly





- Among Japanese OEMs, Toyota is at the forefront. At the 2025 Shanghai Auto Show, the BZ series showcased involvement from local suppliers. Lexus has also become the second foreign OEM to establish a factory in China. Nissan continues to strengthen its partnership with Dongfeng, introducing the new N7, and Frontier Pro PHEV pickup truck. Honda announced collaborations with local suppliers like Deepseek and Momenta.
- Among German OEMs, Volkswagen and Audi have adopted relatively aggressive strategies. Volkswagen, using three joint ventures in China, has developed three new models for the Chinese market. Audi has deepened its partnership with SAIC, launching a new BEV sub-brand. Audi, for the first time, equipped its ICE vehicles with an advanced driving assistance system provided by Huawei. For voice systems, BMW has partnered with Alibaba and Deepseek. Mercedes-Benz has expanded its R&D team in China to create a customized driver assistance system tailored to the Chinese market.
- Among American OEMs, Cadillac and Buick under General Motors have both announced partnerships with Momenta, aiming to further develop domestic advanced driver assistance technologies through collaborations with local suppliers.

Oversees expansion remains





- Among OEMs' joint ventures, Nissan and Mazda have launched several new global models through
 partnerships with domestic brands, such as Nissan's N7 and Frontier Pro PHEV, and Mazda's EZ-6 and
 EZ-60.
- For domestic OEMs, the focus is on further expanding into overseas markets. Changan Automobile's new
 factory in Thailand is about to commence production, and the company has introduced the "In Europe,
 For Europe" strategy for the European market. SAIC Motor has unveiled its "Global Strategy 3.0," a
 "global + local" approach that relies on localized ecosystems to build a truly global automotive brand. At
 the auto show, Hongqi announced its overseas expansion strategy, aiming to establish a "Shared Value
 Community for Mobility" together with international users and partners, while showcasing multiple global
 models. Other domestic brands such as Chery, Dongfeng, and JAC have also officially announced new
 plans for overseas markets.

Takeaway(s)

With the rise of domestic brands and new energy vehicles, joint ventures among carmakers are gradually shifting their strategies in China. They are deepening collaborations with local suppliers and launching models tailored for the Chinese market in hope of boosting their competitiveness.

Takeaway(s)

In addition to focusing on the Chinese market, both domestic and carmakers in joint ventures are increasingly setting their sights on the global stage. They are positioning China as a core R&D hub while steadily expanding the global competitiveness and market share of their product portfolios. However, as they venture abroad, automakers must also pay close attention to current tariff issues and the preferences and habits of local consumers, avoiding the pitfalls of blind expansion.



Key Insights: AI and new business development

Wide application of AI





- At the 2025 auto show, intelligent cockpit technology showcased a systemic transformation centered
 around large AI models. Multimodal large models are evolving from traditional voice assistants into "AI incabin companions" capable of emotional understanding, proactive services, and personalized memory.
 This marks a shift from "human-machine interaction" to "human-machine empathy." The application of
 large AI models in smart cockpits is accelerating the evolution from function-centric designs to user
 experience-oriented, intelligent, and personalized cabins.
- In the field of advanced driving assistance system, AI applications are expanding from perception layers
 to decision-making and control layers, promoting the advancement of driver-assistance systems toward
 higher levels of automation. Through deep learning and large-scale data training, AI can more accurately
 recognize complex road conditions and traffic behaviors, enabling safer and more efficient driving
 assistance functions. With continuous improvements in regulations and technologies, AI is expected to
 play a critical role in achieving higher levels of advanced driving assistance system (such as L3 and L4),
 accelerating the commercialization of new intelligent driving technologies.
- In intelligent chassis technology, AI is facilitating a shift from passive response to active prediction. By
 analyzing real-time data and leveraging machine learning, AI can comprehensively assess the vehicle's
 driving status, road conditions, and driver behavior, enabling dynamic control and adaptive adjustments of
 suspension, steering, and braking systems. This not only enhances vehicle handling and comfort but also
 significantly improves driving safety.

New technologies business development





- At the show, humanoid robots not only served as eye-catching "booth models" but also demonstrated
 promising applications in intelligent manufacturing and service industries. For instance, XPENG
 showcased its humanoid robot "IRON," which features a natural gait and agile movements, reflecting the
 company's progress in intelligent interaction technologies. In addition, GAC Group demonstrated its
 third-generation humanoid robot "GoMate," equipped with 38 degrees of freedom and capable of selfbalancing and walking in complex environments. The robot is expected to be applied in automotive
 manufacturing and other fields by 2026.
- In the burgeoning low-altitude economy sector, eVTOL (electric vertical takeoff and landing) aircraft
 displays became a major highlight. XPENG's "Land Aircraft Carrier" flying car, featuring a modular design
 and supporting both manual and autonomous flight modes, is scheduled for delivery starting in 2026.
 The vehicle has already completed trial flights at Shanghai Pudong International Airport, showcasing its
 potential for urban low-altitude transportation. Furthermore, brands such as Hongqi, Chery, and
 Changan also presented conceptual designs for their own eVTOL aircraft at the show.

Takeaway(s)

As AI technology continues to evolve, automakers are increasingly integrating AI into various areas of development, including intelligent cockpits, advanced driver-assistance systems (ADAS), and chassis control.

Takeaway(s)

Beyond the automotive sector, the 2025 Shanghai Auto Show also featured the debut of several innovative technologies, such as humanoid robots and low-altitude aircraft. Under the prevailing trends of intelligent connectivity and electrification, these technologies share certain underlying technical foundations with smart electric vehicles. Automakers are now leveraging their strengths to integrate ecosystems and technologies, advancing across multiple fronts simultaneously.



Auto Shanghai 2025 Trends

The key trends from Auto Shanghai 2025



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Auto Shanghai 2025 Key Trends

1.

Intelligent Cockpit

VPA upgrades, cockpit ecosystem and multi-screen cockpits



Li auto's VPA uses an in-house developed MindGPT with multi-modal interaction.



BYD DiLink opens sensor interfaces and control permissions to help developers create apps.



BMW has collaborated with Alibaba to develop an AI engine. 2.

Digital Chassis and Architecture

Centralized computing platforms and by-wire controls



IM released its steer-bywire chassis. It integrates braking, steering, suspension, and electric drive systems.



Lenovo released the XH2 central computing platform. It uses MediaTek C-X1 and NVIDIA Thor dual-core.



SiEngine launched an all-in-one cockpit solution using 'Star One' and 'Longying One' chips.

3.

Electrification

EV charging and battery safety



Zeekr released V4 Ultra-Fast Charging Pile with a single-gun peak power of 1.3MW and capable of adding 300km of range in 5 minutes.



Huawei launched the Drive ONE 5-in-1 Electric Drive Assembly with an efficiency ≥ 92.5%.



Geely Auto released a new battery brand, "Aegis Gold Brick Battery". 4.

ADAS

Large language models, lidar and camera-based systems



Zhuoyu brought a Lidar aimed at solving blind spot problems such as in multi-story parking garages.



SenseAuto released its near real-time online interactive 4D world model "Kaiwu 2.0".



Continental released two ADAS solutions based on their sixthgeneration millimeterwave radar and Horizon J6 series chips.





Intelligent Cockpit – VPA Upgrade, AI Continues to Provide Enhancement

AI assistant and the interactive experience





- BMW has collaborated with Alibaba to develop an AI engine, based on Tongyi & Banma Yuanshen AI, for a new generation of VPA. BMW launched 'Car Genius' and 'Travel Companion' functions, covering vehicle function Q&A, and trip planning. Through in-vehicle sensors and realtime data analysis, the VPA can proactively remind users of their driving habits and provide suggestions for driving modes based on different weather and road conditions.
- Nomi (voice assistant of NIO) uses the Nomi GPT multimodal LLM with the technical frameworks of multimodal perception, cognitive hub, emotion engine and multi-intelligence body. The emotion engine realizes 3 capabilities of contextual intelligence, exclusive intelligence and emotional expression. Based on this technology, Nomi has introduced AI functions such as Infinite Fun Chat, AI Scene Generation, Full Cabin Memory and Nomi Personalized Suggestion.
- Li auto's VPA uses an in-house developed MindGPT model with multi-modal interaction, like voice, vision and language, realizing auditory & visual capabilities. It can connect with Face ID & family account, remember user's preferences and requirements and can understand complex problems & show perception and thinking. It can support multiple tones and sing & learn and can use 300+ assistive tools to find traffic restrictions and search for Meituan shops.











Takeaway(s)

With the continuous refinement of LLM, OEMs have begun to incorporate 1 or even more LLM technologies into vehicles, striving to create a better intelligent & personalized experience for users. The wide application of LLM has enabled VPAs to evolve from passively waiting to AI in-cabin companions with emotional understanding, active services and personalized memories, and this technology's application has become one of the most popular in the cockpit.

LLMs Further Enhance Cockpit Intelligence





- Banma Zhixing the Yuan Shen AI intelligent cockpit. The deeply integrated composite architecture system combines a pipeline architecture and end-to-end model, enhancing the real-time judgment accuracy of the inference system. The interaction builds a natural language communication and differentiated service system, narrowing the experience between the user and the service platform.
- Intel launched a second-gen AI-enhanced software-defined automotive SoC with a multi-node die architecture. It delivers up to a 10x increase in generative and multi-modal AI performance and up to a 3x increase in graphics performance compared to the previous generation. The architecture has 12 camera channels.
- Visteon and Volcano Engine launched the next-generation smart cockpit solution based on LLM. The solution combines Visteon's high-performance domain control platform with the AI capabilities of Volcano Engine's Doubao LLM.
- Zhuoyu brought a multimodal VLA big model, support fast thinking / slow reasoning dual-mode dynamic switching. The model can be used for small talk, complex question answering or crossdomain knowledge querying.













Takeaway(s)

Intelligent cockpit is upgraded with AI LLM as the core, besides its application in VPAs, it is also widely used to enhance the intelligent in-vehicle experience, like the development of the cockpit, the user's personalized settings, and other kinds of customized scenario modes etc. The intelligent cockpit is evolving from a simple function integration platform to a user experience-centered intelligent space.





Digital Chassis & Architecture – The rise of centralized architectures

Pre-scale mass production of Steer-by-Wire





- IM released its steer-by-wire digital chassis technology. Taking the X, Y, Z three-way six-degree-offreedom digital fusion control as the core. It integrates braking, steering, suspension, and electric drive systems data and adjusts the body dynamics at a frequency of 1kHz. It can predict body movement through the sensing of road conditions, to achieve large wheel angles with small steering wheel angles at low speeds, and reduction in steering sensitivity at high speeds. It is equipped with dual-redundant drywire control systems.
- Denza is launching the first concept car equipped with China's self-developed steer-by-wire system -Denza Z. It eliminates the need for a mechanical connection and changes the traditional steering logic, with millisecond response speed and millimeter steering precision.
- NIO ET9 is equipped with a ZF steer-by-wire system with full electrical control eliminating the mechanical connection. The system supports the dynamic adjustment of the steering ratio from 6:1 at low speeds to 14:1 at high speeds. 240° of rotation on one side is required to hit full lock (0.66 turns).
- China Changan Chenzhi Technology brings a new generation of chassis motion integration solutions. It covers several technological breakthroughs, such as EMB solution, steer-by-wire system, AHS/LMES hydraulic/electromagnetic suspension. The solution has multiple power combinations, brake control, droop solutions and system-level redundancy. The solution can adapt to complex driving scenarios, such as snow and ice and emergency obstacle avoidance.















The rise of centralized computing platform





- Lenovo released the XH2 central computing platform. It uses MediaTek C-X1 and NVIDIA Thor dual-core heterogeneous architecture and integrates cockpit rendering, driving decision-making and large model inference capabilities through hardware resource pooling. It supports FP8/FP4 mixed-precision computation and achieves millisecond response to multimodal interaction.
- Zhuoyu fusion controller is based on the Qualcomm Snapdragon Ride Flex SoC (SA8775P), which combines assisted driving with smart cockpit functionality. Combined with the global scheduling policy, the command transmission delay between the assisted driving domain and the cockpit one is reduced.
- Continental introduced the Assisted Driving and Cockpit High Performance Computing Unit, which integrates IC, infotainment and assisted driving system functions onto a single SoC. The solution pools resources through hardware virtualization technology. It reduces e-architecture complexity by 30%, shortens development cycles and supports seamless collaboration of cross-domain functions.
- SiEngine has launched an all-in-one cockpit solution combining 'Star One' and 'Longying One' chips. Based on the homogenous software architecture, it integrates the computing resources of the cockpit and assistant drive to reduce hardware costs. The hypervisor achieves on-demand distribution of computing power to improve energy efficiency and real-time response.









Takeaway(s)

Steer-by-wire technology is evolving from a single functional module to full digital integration, enabling vehicle mobility through multi-system collaboration. The demand for high-level automated driving has pushed the redundant design of steer-by-wire systems to become standard, and multiple safeguards have been realized from hardware to function. At this auto show, local companies have made significant progress in core technology and large-scale mass production, driving up penetration rates.

Takeaway(s)

Automotive domain control technology is gradually transforming from function stacking to centralized computing unit. Cockpit-ADAS fusion accelerates, and arithmetic power & LLM deeply synergize. The central computing and area control architecture is deepened, and the response speed is improved by decoupling software and hardware. Meanwhile, more localized enterprises show technology autonomy and ecological synergy. At this auto show, some OEMs and related suppliers exhibited their latest progress under the field.





Electrification – New standards drive battery safety

National standards drive battery safety





- Geely Auto released a new battery brand, "Aegis Gold Brick Battery". It integrates the previous "Gold Brick Battery" and "Aegis Short Blade Battery" technologies. Through 36 safety tests, including 23 standards exceeding national standards such as 30km/h underbody impact and 20km/h vehicle negative curb impact and 12 enterprise-exclusive tests such as cell nail penetration and seawater immersion. This ensures the battery is not compromised under more extreme conditions. Furthermore, it is opening its collection of battery bottom safety patents to the industry, including designs for crash beams and underbody shields.
- CATL launched its Na-ion battery, covering environments from -40℃ to +70℃. It maintains 90% usable capacity at -40℃, and power does not decline when 10% capacity remains. Simultaneously, through intrinsic material safety such as the combination of Prussian White cathode and hard carbon anode, electrolyte system restructuring (low-concentration sodium salt electrolyte), and honeycomb-like composite separator technology, it removes the risk of fire under extreme tests like nail penetration and electric drill penetration. In high-speed collision scenarios, it can also actively cut off the circuit, avoiding chain reactions.
- Changan and Talent New Energy jointly developed the Ultra-safe Safe+ Series battery. It uses high ion conductivity solid electrolyte materials and ISFD technology (in-situ sub-micron industrial film formation), eliminating the thermal runaway risk of liquid electrolyte from the material source. Structural innovations increase cell energy density while ensuring intrinsic safety.
- GAC's new generation Magazine Battery debuted at the Shanghai Auto Show. The Magazine Battery technology ensures safety through a three-level safety immunity system. Using nano-ceramic materials and composite current collectors. The cells are resistant to penetration (no fire with 5-pin penetration), high temperatures (heat resistance increased by 30%), and torsion (no fire or smoke with over 180° torsion), reducing thermal runaway risk. Through a thermal insulation safety cabin (temperature resistance above 1400℃), a rapid cooling system (heat dissipation efficiency increased by 30%), and a fifth-generation BMS management system (all-weather monitoring 10 times per second), it achieves rapid suppression of thermal runaway.
- Dongfeng highlighted multiple innovative achievements in safety technology with its Mach Battery. The bottom of the Mach Battery uses a 1200MPa ultra-high strength steel shield combined with a honeycomb aluminum alloy frame. It is capable of withstanding 300kN of external force extrusion (exceeding 3 times the national standards) and maintains structural integrity in a 10-meter high-altitude drop test. Furthermore, the battery system achieved IP68 waterproof rating through double-layer sealing, effectively resisting underwater dragging and saltwater immersion. Using high-safety electrolyte and a ceramic-coated separator, it inhibits heat generation from short circuits. Even if cells are penetrated or cut, it can control the thermal runaway temperature below 200°C, avoiding fire and explosion.











Takeaway(s)

Recent upgrades to the national standards for EV battery safety requirements, especially against the risk of thermal runaway, are driving manufacturers' efforts on strengthening their batteries' safety and stability capabilities. At the show, three major trends defined the battery safety technology presentations: material safety innovation, all-scenario adaptive structural design, and intelligent safety ecosystem openness. These technologies not only address the dangers of thermal runaway found in traditional batteries but also drive the industry's upgrade from passive protection to active immunity, laying a stronger foundation for the popularization of EVs.





ADAS – Large language models contribute to the development of SAE L3/L4

Improvement to large language models





- Xpeng showcased its World Foundation Model. This multi-modal large model uses a large language model as the backbone network. It possesses visual understanding, chain-of-thought reasoning, and action generation capabilities. Xpeng defines it as a foundation model that can be generalized to various devices.
- Huawei released ADS 4.0, which will utilize the brand-new large model WEWA architecture (World Engine + World Action Model). This architecture is split into cloud-based and vehicle-based parts for full-modal perception and safety reinforcement learning.
- SenseAuto released its near real-time online interactive 4D world model "Kaiwu 2.0". It is capable of achieving "4D spatial-free interaction" and supports mass production-oriented data generation. It possesses the ability for controllable generation of diverse scenarios, and can generate high-risk ones, providing data for model training.
- Zhuoyu brought its vehicle-side multi-modal Vision-Language-Action (VLA) large model. By fusing visual, language, and action data, it can parse long-tail scenarios such as pedestrian crossings. road construction, and approaching special vehicles. It is capable of outputting transparent decision logic. breaking the limitations of traditional "black box" models. VLA has stronger explainability and possesses human-like interaction capabilities.









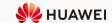


SAE L3/L4 ADAS





- Huawei released ADS 4.0, which will be divided into four categories. It is claimed that the highest level, Ultra is capable of L4 automated driving on highways.
- At the auto show, GAC released a vehicle jointly developed with Didi capable of L4 autonomy. It is based on GAC's existing platform and Didi's L4 software and hardware. It will provide robotaxi services and will be equipped with 10 Lidar units. GAC promised to take full responsibility for the safety of ADAS technology in future L4 models. The model is expected be ready for mass production this year, with partial demonstration operations starting in 2026, and opening up to individual users in 2027.
- Zeekr released its flagship model 9X. It will be equipped with L3 ADAS called Qianli HaoHan H9. It will use 1 long-range Lidar and 4 blind-spot Lidars and will be the first to use two NVIDIA Thor chips, providing a total computing power of 1400 TOPS.
- Pony.ai debuted its seventh-gen robotaxi solution. It is capable of achieving L4 autonomous driving and features a platform-adaptive design. Initially, it will be fitted on the Toyota bZ4X, BAIC Arcfox Alpha T5, and GAC Aion Hyper HT. Other automakers, such as Changan, SAIC, and Chery, also announced the planned launch timelines for their L3/L4 technologies, which are expected to be gradually implemented in vehicles from 2026 onwards.









Takeaway(s)

At the 2025 Shanghai Auto Show, multiple manufacturers showcased AI large models based on central high-performance computing platforms, marking a step towards higher-level automated functions. Using corpuses and multi-modal training, AI large models enable vehicles to have stronger scene understanding and semantic segmentation capabilities under multi-sensor input, providing data-driven decision support. By relying on end-to-end scene reasoning and behavior decision making, they also reduce the complexity of modular development and improve the efficiency of algorithm validation.

Takeaway(s)

Although it was reported before the Shanghai Auto Show that the Ministry of Industry and Information Technology and other government departments would tighten control over automakers' promotion of intelligent assisted driving and clarify relevant function boundaries, some automakers and suppliers announced their plans for L3, and L4 autonomy. Nevertheless, before the government permits L3/L4 operation, all ADAS functions will remain L2, thus requiring continuous user attention.



Next Steps

How SBD Automotive can help



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Insightful planning support for navigating the industry

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Technical Consulting

Assessing and contextualizing disruptive tech domains

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Testing Support

Access to experienced UX, performance and pen test experts

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Deep dive into events. This report provides comprehensive insights into of events with a focus on automotive.

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Software Defined Vehicle: E/E Architecture Guide

Right decisions on E/E architecture leads to increased vehicle safety, security, and system usability

Learn more **3**





Al for Automotive Guide

With Generative AI making significant inroads, advertising and digital industries, it is critical to identify and futurecast the impact of this technology to the automotive value chain.

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EV Guide

SBD's EV Guide provides insight into the current situation for massproduced passenger and light commercial EVs, their features.

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