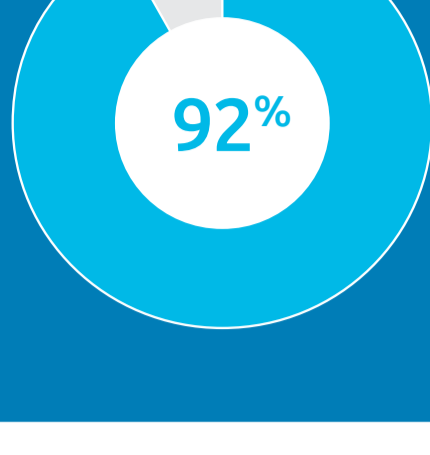


# The software-driven mobility era

Beyond vehicles

## The expanding impact of software-driven mobility (SDM)

The auto industry is aligned on the transformative role of software



of automotive organizations believe that every organization will become a software company to support software-defined vehicles (SDVs) and mobility services.

### Software revenues

81%

of organizations believe that software-defined products and services, not just physical vehicles, will become the core value proposition.

The share of OEMs' revenues from software-defined products and services is expected to

**double**

over the next decade.

### Software becoming integral organization-wide

61%

of organizations report that their software-defined strategy will impact over 50% of their brands within the next five years.

83%

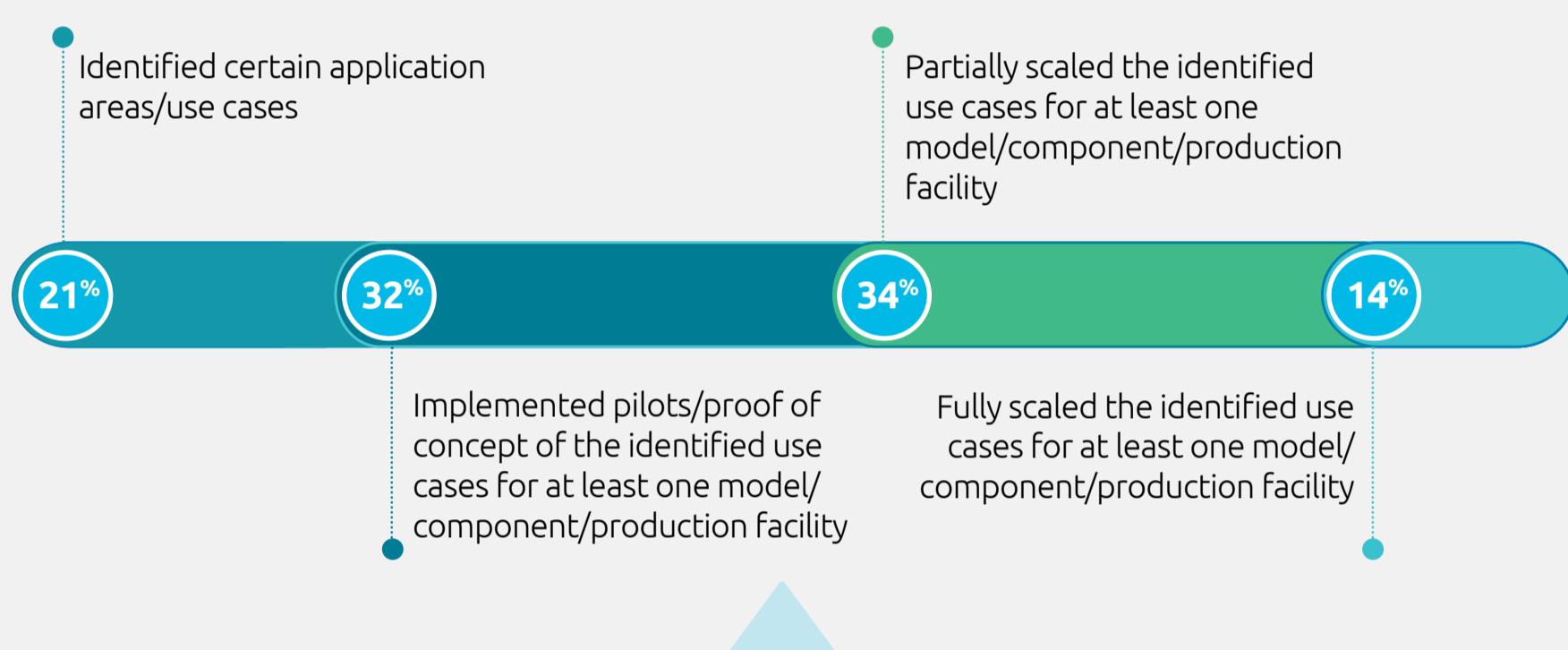
of automotive organizations identified creation of a single software platform to run all customer-related functions, controls, and services as a key component of their SDM strategies.



Source: Capgemini Research Institute, Software-driven mobility survey, June 2025, N = 200 overall automotive organizations, N = 100 original equipment manufacturers (OEMs), N = 88 suppliers.

## SDM demands an organizational overhaul

Less than half have scaled their SDM initiatives

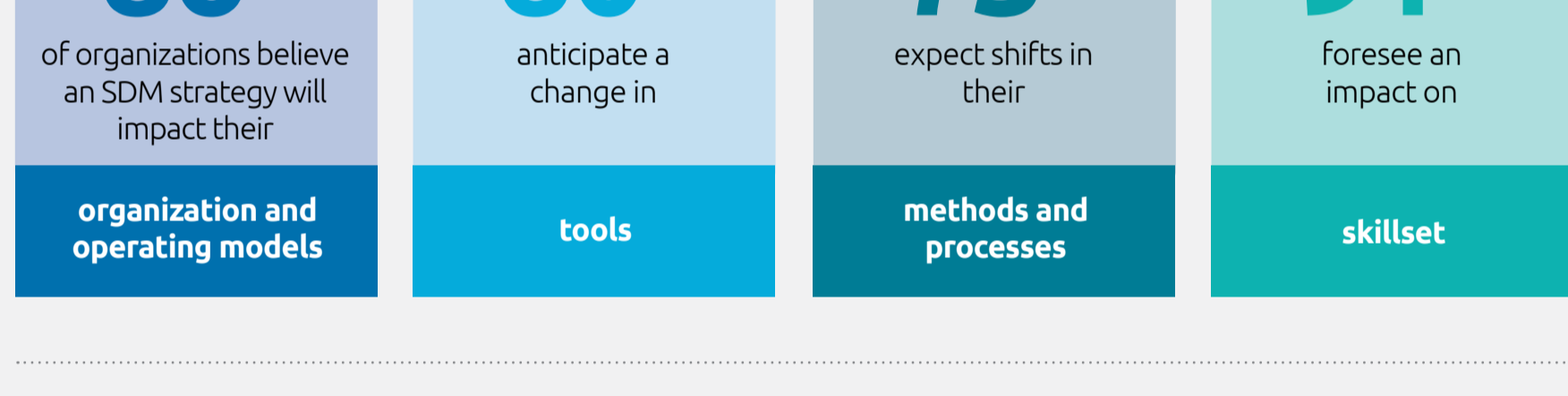


Only a few automotive organizations have fully scaled their SDM use cases

Source: Capgemini Research Institute, Software-driven mobility survey, June 2025, N = 200 automotive organizations.

While ambitions are strong, realizing the full potential of SDM will require organizational transformation

Adopting an SDM strategy demands an overhaul of the operating model



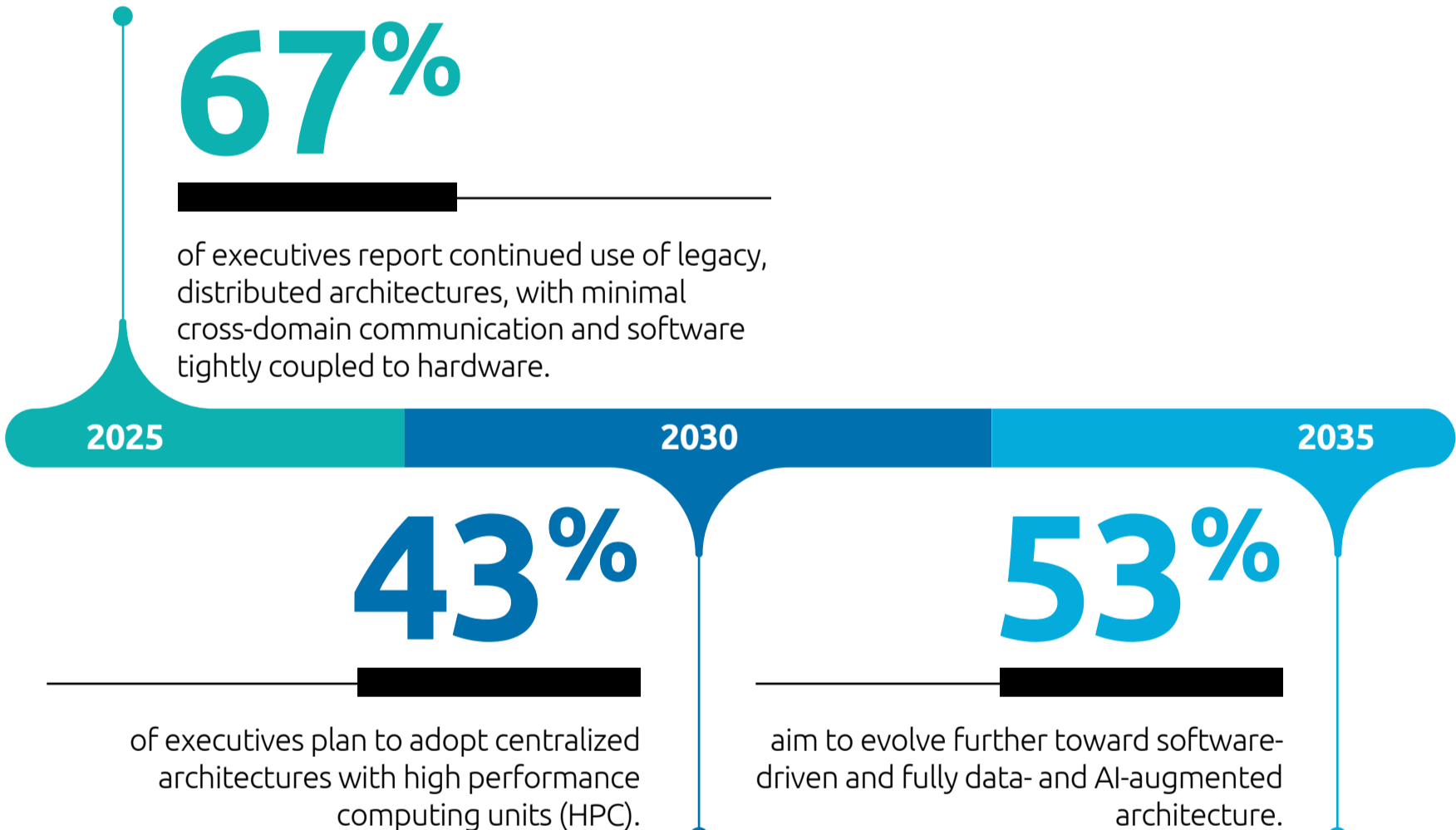
Source: Capgemini Research Institute, Software-driven mobility survey, June 2025, N = 196 automotive organizations.

## Preparing for a software-first future

Automakers are steadily transitioning from a function- and domain-based architecture to a more centralized and software-driven architecture

Automakers are adopting a phased approach to gradually transform their E/E architecture into a more centralized, software-driven model that is both scalable and upgradable.

Percentage of automotive organizations citing evolution of >50% of vehicle architectures



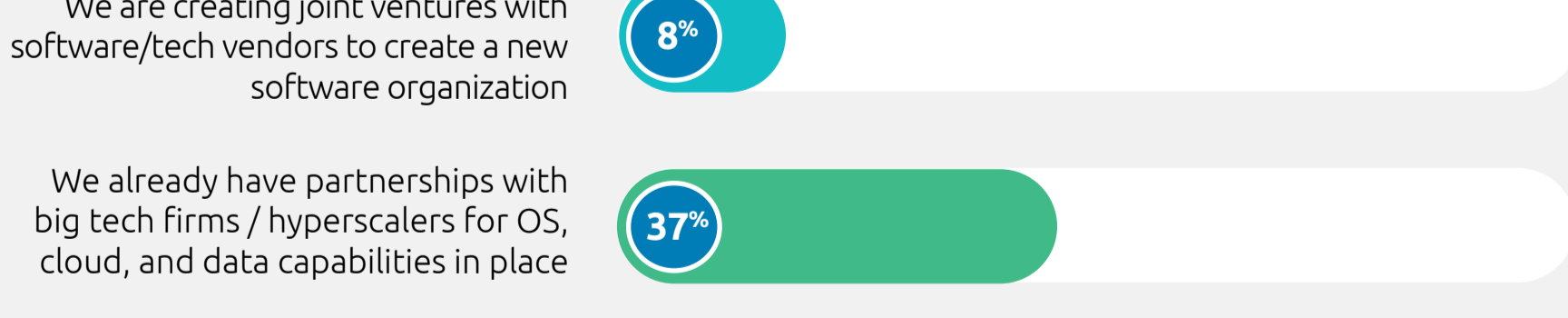
Source: Capgemini Research Institute, Software-driven mobility survey, June 2025, N = 21 automotive executives from organizations that are in the process of decoupling (i.e., separating their previously tightly integrated hardware and software architectures and development cycles).

## Partnerships and ecosystems are driving software-driven mobility

Nearly two in five automotive organizations have partnerships in place with big tech/ hyperscalers

Automotive organizations realize that they cannot master every part of this transformation on their own. So, they are partnering with allies in certain areas while maintaining a tight grip where it matters to their brands.

Percentage of automotive organizations commenting on the current state of their partner ecosystem for SDM



Source: Capgemini Research Institute, Software-driven mobility survey, June 2025, N = 200 automotive organizations.

## How the automotive industry can forge a software-first future

Key recommendations for organizations to become software-ready organizations

Setting the foundation of a software platform for products and services

- Establish a unified software and electronics platform to manage the complexity of future vehicles and mobility services
- Build uncompromising cyber, safety, and compliance resilience
- Enhance CX/UX for an engaging experience

Accelerating to transform into a software company

- Create profitable data- and service-centric business models
- Future-proof talent and foster a software-driven culture
- Strengthen software sovereignty and supply chain resilience

Streamlining industry-grade software delivery

Source: Capgemini Research Institute analysis.

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