

The software-driven mobility era

Beyond vehicles

The auto industry is aligned on the transformative role of software

The expanding impact of software-driven

mobility (SDM)



organization will become a software company to support software-defined vehicles (SDVs) and mobility services.

of automotive organizations believe that every

Software revenues

products and services, not just physical vehicles, will become the core value proposition.

The share of OEMs' revenues from softwaredefined products and services is expected to

of organizations believe that software-defined

double

over the next decade.

equipment manufacturers (OEMs), N = 88 suppliers.

Software becoming

integral organization-wide

of organizations report that their software-

brands within the next five years.

defined strategy will impact over 50% of their

of automotive organizations identified creation

of a single software platform to run all customerrelated functions, controls, and services as a key component of their SDM strategies.



facility

SDM demands an organizational overhaul

Less than half have scaled their SDM initiatives

areas/use cases

Identified certain application

Fully scaled the identified use cases for at least one model/

Partially scaled the identified

model/component/production

use cases for at least one



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

cases for at least one model/ component/production facility

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

component/production facility

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

impact their organization and operating models

of organizations believe

an SDM strategy will

tools

anticipate a

change in

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

expect shifts in

their

skillset

foresee an

impact on

Preparing for a software-first future

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.

Automakers are steadily transitioning from a function- and

domain-based architecture to a more centralized and software-

driven architecture

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

distributed architectures, with minimal cross-domain communication and software tightly coupled to hardware. 2025 2030 2035

computing units (HPC). 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).

of executives plan to adopt centralized

architectures with high performance

of executives report continued use of legacy,

Partnerships and ecosystems are driving software-driven mobility

architecture.

aim to evolve further toward software-

driven and fully data- and AI-augmented

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

ecosystem for SDM We are creating joint ventures with

Percentage of automotive organizations commenting on the current state of their partner

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

software organization

software/tech vendors to create a new

We already have partnerships with big tech firms / hyperscalers for OS, cloud, and data capabilities in place

to their brands.

How the automotive industry can forge a software-first future

Key recommendations for organizations to become

software-ready organizations Accelerating to transform into Setting the foundation of a software platform for products and services a software company

Establish a unified software and electronics platform to manage the complexity of future vehicles and

- mobility services Build uncompromising cyber, safety, and
- engaging experience

compliance resilience

■ Enhance CX/UX for an

- Create profitable data-Adopt cloud-native DevSecOps across the and service-centric business
 - foster a software-driven culture Strengthen software sovereignty and supply

■ Future-proof talent and

models

- chain resilience
- Streamlining industrygrade software delivery

vehicle and services lifecycle

Build a unified data

foundation for Al-

enhanced vehicle

development and

market

accelerating time to

Orchestrate an open,

multiparty ecosystem

Download report

Source: Capgemini Research Institute analysis.



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