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**Research Report on  
Intelligent Vehicle E/E  
Architectures(EEA) and Their  
Impact on Supply Chain in  
2024**

Sept. 2024

# E/E Architecture (EEA) research: Advanced EEAs have become a cost-reducing tool and brought about deep reconstruction of the supply chain

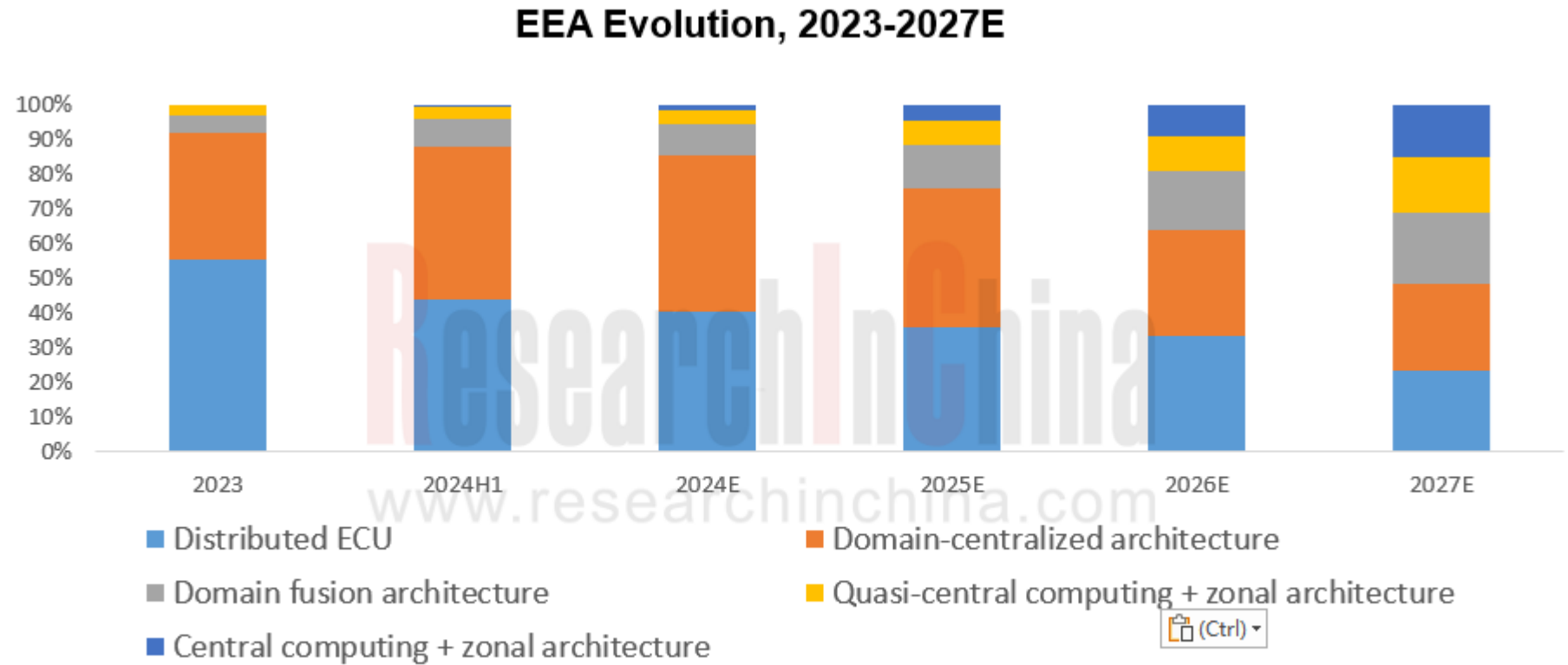
In this report, ResearchInChina divides the EEAs of OEMs into five types:

- ◆ Distributed ECU
- ◆ Domain centralized architecture: The multi-domain architecture spreads to fuel vehicles, A-class and below battery-electric passenger cars;
- ◆ Domain fusion architecture: Usually equipped with the vehicle central domain controller, it can support cross-domain communication, such as cockpit-driving integration, integration of intelligent driving and chassis, cockpit-body-gateway integration, camera sharing, etc.
- ◆ Quasi-central computing + zonal architecture: With ZCUs (intelligent power distribution, zonal servitization), there are still multiple computing centers with multiple boxes and chips;
- ◆ Central computing + zonal architecture: With vehicle-level OS and ZCUs (intelligent power distribution, zonal servitization), it can support a computing center with multiple chips or a single chip in a single box to realize the integration of cockpit domain, intelligent driving domain, vehicle control domain, etc..

# The central/quasi-central + zonal architecture has become a way for OEMs to reduce costs

According to statistics from ResearchInChina, 779,000 passenger cars with domain fusion architectures were sold in 2024H1, accounting for 7.9%, followed by 336,000 passenger cars with quasi-central + zonal architectures with a share of 3.4% and 67,000 passenger cars with central + zonal architectures with a share of 0.7%.

Due to the obvious cost advantages incurred by zonal architectures and the superior vehicle space design, the penetration rate of "quasi-central + zonal" architectures and "central + zonal" architectures will reach 16.3% and 14.3% by 2027 respectively.



# Geely EEA Deployment (Some Models Listed)

For example, Geely secured an electrification rate of 34.2% and a domain fusion architecture penetration rate of 25.4% in 2024H1.

**Geely's EEA Deployment (Some Models Listed)**

OEM	EEA	Architecture type	Vehicle platform architecture	Brand	Model	Quotation (RMB10,000)	Level	Fuel type	Launch time	2023 Sales volume	Sales volume in 2024H1
Geely	GEEA2.0	Domain centralized architecture	SEA	ZEEKR	ZEEKR 001	26.90-32.90	CAR-C	EV	April 2021	76246	54568
Geely	GEEA2.0	Domain centralized architecture	SEA	ZEEKR	ZEEKR 007	20.99-29.99	CAR-B	EV	December 2023	857	27164
Geely	GEEA2.0	Domain centralized architecture	SEA	ZEEKR	ZEEKR 7X	Pre-sale: RMB239,900+	SUV-B	EV	A new model (2024)		
Geely	GEEA2.0	Domain centralized architecture	e-CMA	Galaxy	Galaxy L6	9.98-15.98	CAR-A	PHEV	September 2023	17250	29822
Geely	GEEA2.0	Domain centralized architecture	e-CMA	Galaxy	Galaxy L7	12.57-18.57	SUV-A	PHEV	May 2023	66247	36182
Geely	GEEA2.0	Domain centralized architecture	CMA2.0 Platform	Lynk & Co	Lynk & Co 08	19.58-28.80	SUV-B	PHEV	September 2023	32129	35643
Geely	GEEA2.0	Domain centralized architecture	SEA	Lynk & Co	Lynk & Co Z10	Pre-sale: RMB215,800+	CAR-C	EV	A new model (2024)		
Geely	GEEA3.0	Quasi-central + zonal architecture	GEA Platform	Galaxy	Galaxy E5	11.28-14.88	SUV-A	EV	A new model (2024)		
Geely Group				Sales volume of electrified models (EV&PHEV&REEV)						558,975	339,574
				Sales volume of fuel vehicles						1,196,211	652,439
				Total sales volume of all models (electrified + fuel)						1,755,186	992,013
				Sales proportion of electrified models (EV&PHEV&REEV)						31.8%	34.2%
				Total sales volume of models with domain centralized architectures (GEEA2.0)						349,607	252,158
				Sales proportion of models with domain centralized architectures (GEEA2.0)						19.9%	25.4%

Source: ResearchInChina

# Geely Galaxy E5 debuted with GEEA 3.0

In August 2024, Geely Galaxy E5 debuted with GEEA 3.0:

- In the body domain, there are a driver-side ZCU (ZCUDM) and a front-passenger-side ZCU (ZCUP)

- Flyme Auto is deeply customized based on Android

- The single-chip "cockpit-parking integration solution is based on "Longying No.1" of SiEngine Technology

- The electric drive system realizes "eleven-in-one": VCU, MCU, HBMS, LBMS, OBC, DCDC, PDU, Motor, Reducer, GWRC and TMS

- As the quasi-central + zonal control architecture brings advantages like better vehicle wiring harness layout, weight reduction, and cost reduction, the usable area in the Galaxy E5 car accounts for 67.2% of the total cockpit space, which is outstanding among battery-electric A-class SUVs of the same level. It is priced at RMB109,800-145,800 after being subsidized and discounted. It is expected to have a huge impact on the A-class battery-electric SUV market.

Geely will promote GEEA 3.0 among more models, and further install vehicle-level OS in vehicles to form a true central computing + zonal architecture platform.

In addition, Leapmotor's vehicles equipped with central + zonal architectures have experienced a surge in sales volume. Leapmotor's main models currently on sale, namely C16, C10, C11 and C01, carry the latest LEAP 3.0 ("Four-leaf Clover" central + zonal architecture). In August 2024, Leapmotor sold 30,305 vehicles, a year-on-year spike of more than 113%.

Based on LEAP 3.0, four domains are integrated into one, and the number of ECUs is slashed. Compared with LEAP 2.0 (domain centralized architecture), LEAP 3.0 makes the number of automotive controllers in the vehicle fall from 42 to 28, the vehicle wiring harness to less than 1.5 km, and the weight to 23 kg. While reducing costs and increasing space, it improves functional configuration and lower the price.

The central/quasi-central + zonal architecture has become a way for OEMs to reduce costs, such as Leapmotor C series, Geely Galaxy E5, IM L6, and the soon-to-be-delivered Voyah Courage.

## EEA innovation: In addition to SoCs, ECU integrated design and central cross-domain SoCs (MCUs) will be introduced to accelerate supply chain integration and reduce costs.

A vehicle equipped with a traditional distributed architecture has more than 100 ECUs. The functional domain architecture has achieved partial ECU integration. Under the final central computing + zonal architecture, ZCUs and HPCs will integrate most of the ECUs in the vehicle.

The hardware design concept of ZCUs is to standardize controllers by board-level integration, and integrate all control modules with similar properties in a zone. The MCU integrates ECUs into a super large controller, so that one PCBA controls the functions of different zones. Therefore, under the zonal architecture, the number of ECUs is slashed, and the reduced ECUs are incorporated into ZCUs. Alternatively, they can be uploaded to the HPC, and transformed into smart sensors or actuators.

ZCUs can reduce the number of ECUs and communication interfaces, wiring harness costs and weight while saving space and achieving higher computing power utilization. Currently, most OEMs have planned to use 2 to 4 ZCUs in their next-generation multi-domain computing architectures each to integrate most ECU functions and cut down the number of ECUs.



# ECU Integration Design Concept of Some OEMs

ECU Integration Design Concept of Some OEMs

OEM	EEA	OEM ECU integration design	Supplier system	Main chip
Tesla	✓ Quasi Central Architecture	✓ Tesla introduced three ZCUs (BCM-F/L/R) to supply power to each actuator of the vehicle, and conduct the unified management of different zonal nodes and their components through the CCM, and then form interaction via CAN communication, which simplifies the internal topology of the vehicle.	✓ ZCU: independent R&D + OEM	✓ Renesas RH850
Leapmotor	✓ "Four-Leaf Clover" architecture	✓ Based on the "Four-Leaf Clover" architecture, the number of ECUs is slashed, the number of automotive controllers in the vehicle falls from 42 to 28, the vehicle wiring harness is shortened to less than 1.5 km, and the weight drops to 23 kg.	✓ Central computer (C-DCU): Dahua Hirige ✓ ZCU: Jingwei Hirain Technologies	✓ Qualcomm SA8155P/SA8295P ✓ NXP S32G
GAC	✓ X-Soul	✓ The body domain controller (central computing unit) has been introduced, and the main control chip is NXP S32G399. Many original ECUs have been integrated into ZCUs, and the number of separate ECUs (traditional safety and chassis) may not exceed 10.	✓ Body domain controller (central computing unit): Continental	✓ NXP S32G399
IM	✓ Full stack 3.0	✓ The "central computing + zonal control" strategy will halve the number of domain controllers, increase the data bandwidth by 5 times, shorten the wire harness length by 30%, and speed up OTA by 70%	✓ ZXD1: Jiangsu Tianbao, a subsidiary of Yanfeng Visteon	✓ Qualcomm SA8295P ✓ Nvidia Orin-X*1 ✓ NXP S32G3
	✓ Full stack 1.0	✓ The intelligent computing center (ICC), power, chassis, body control. The body controller is connected to the chassis, cockpit and passive safety system through the intelligent computing domain controller	✓ Intelligent computing center (ICC): Jiangsu Tianbao, a subsidiary of Yanfeng Visteon	✓ Renesas R8A77971 ✓ Infineon MCU-TC397
BYD	✓ e3.0 Platform	✓ BYD's integrated body controller is an ECU that integrates multiple vehicle control modules including BCM, gateway controller, cluster controller, I-KEY controller, Bluetooth information station, reversing radar, tire pressure monitoring module, high frequency receiver module, air conditioning controller, thermal management controller, engine sound simulator, etc.. The extended version supports up to 32 traditional distributed ECUs. ✓ The number of power modules is reduced from N to 1, MCUs from N to 1-2, and housings from N to 1. The assembly process is shorter by (N-1), and wiring harnesses by 50.	✓ Integrated controller: Technology FinDreams (Ctrl) ✓ /	

Source: ResearchInChina

# High-performance MCUs (SoCs) Have been Widely Used

As most of ECU functions are integrated into the HPC and ZCUs, MCUs (SoCs) have been upgraded, and high-performance MCUs (SoCs) have been widely used.

In addition to the widely used NXP S32G2/G3 series, Renesas R-CarS3/S4 series, TI DRA series, SemiDrive G9H and other chips, NXP's powerful 5nm MCUs (SoCs), SemiDrive E3650, etc. also attract much attention.

## **NXP's first 5nm automotive MCU (SoC)**

At the end of March 2024, NXP officially launched the world's first 5-nanometer automotive MCU. However, NXP did not call it an MCU, but dubbed it the S32N55 processor, the first device in the new S32N family of vehicle super-integration processors. It is actually a SoC with the following features:

- It has highly efficient computing cores that emphasize real-time performance;
- The cores can operate in split or lockstep mode to support different functional safety levels up to ISO 26262 ASIL D;
- It has a variety of network interfaces, including CAN, LIN, FlexRay, automotive Ethernet, CAN-FD, CAN-XL and PCIe, with at least 15 CAN network interfaces;
- Multiple ECU functions are integrated, including vehicle dynamic control, body, comfort, and central gateway. For example, S32N55 boasts the Automotive Math and Motor Control Library (AMMCLib) which supports AUTOSAR and small real-time operating systems (such as Zephyr), Real-Time Drivers (RTD), Type1 hypervisors, Inter-Platform Communication Framework (IPCF), Safety Software Framework (SAF) and Structural Core Self-Test (SCST).

## **SemiDrive E3650**

This product uses the latest ARM Cortex R52+ high-performance lock-step multi-core cluster, supports virtualization, has a non-volatile memory (NVM) up to 16MB, large-capacity SRAM and rich available peripheral resources to enable EEAs with higher integration and wider configurations.



# EEA innovation: from decentralized operating system to vehicle-level OS which is the key to central computing

The vehicle OS is oriented towards the central computing platform and is based on SOA. It can integrate the functions of different domains in the vehicle (cockpit, intelligent driving, vehicle control, etc.) into one platform system, thereby providing a vehicle-level platform with the same set of programming interfaces. It is a development and operation platform for all vehicle domain software and services.

- Leapmotor vehicle OS: software and hardware decoupling, SOA, and multi-system software integration.
- Leapmotor OS IVI system: QNX (cluster) + Android (IVI system) based on QNX Hypervisor;
- Gateway, etc.: Linux;
- ADAS, vehicle control, CAN bus system: based on RTOS;
- Communication middleware: DDS distributed communication middleware + Mailbox communication bus;
- SOA: “Four-Leaf Clover” SOA software design architecture. 200+ interfaces are open for custom scenario applications, 500+ interfaces are reserved, scenario codes can be shared. Super senseless OTA: cockpit upgrade completed within 8 seconds (detection environment in 7 seconds, system switching in one second).

## NIO's full-stack self-developed vehicle OS – SkyOS

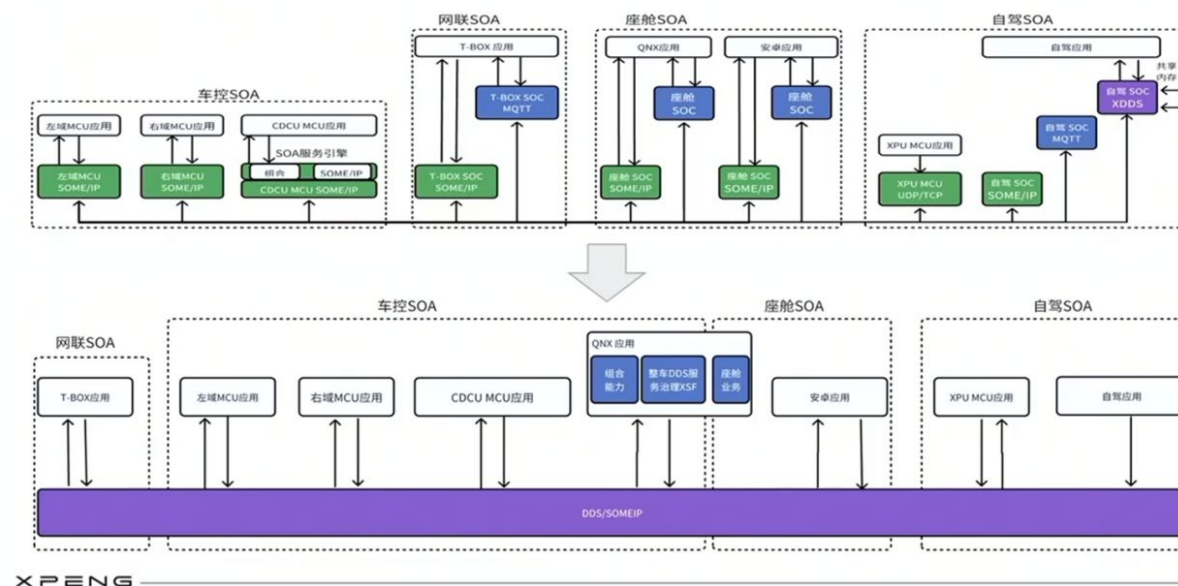
- ◆ **SkyOS-L:** The first real-time operating system that realizes localization of AutoSAR and large-scale commercialization. Compared with AUTOSAR, SkyOS-L has a 30-40% higher real-time periodic signal delivery rate;
- ◆ **SkyOS-M:** The microkernel architecture runs in the central brain and mainly controls the body, chassis, suspension, etc. The kernel is more stable than traditional Linux with better service isolation. On the basis of safety isolation, there is a four-layer monitoring and three-layer recovery security mechanism;
- ◆ **SkyOS-C:** The deeply customized operating system based on Android carries the functions of the smart cockpit, with the self-developed TOX protocol stack, more stable data transmission, and AI smart experience including NOMI;
- ◆ **SkyOS-R:** It improves the load capacity of the system;
- ◆ **SOA framework:** NIO defines a high-performance cross-domain communication protocol named TOX, which means Talks Over X. It can be applied to all network types and all communication terminals;
- ◆ **The cross-domain communication protocol TOX** can provide high-bandwidth, high-capacity, low-latency, and high-reliability communication. It can be 30-50 times faster than the traditional CAN bus. Compared with the traditional automotive communication protocol SOME/IP, the end-to-end delay is reduced by 40%, and the zero packet loss threshold is increased by 109%. The reliability of TOX transmission is higher than SOME/IP.

# Xpeng's unified cross-domain middleware (UCM) for vehicles

**Vehicle communication middleware** includes system security middleware, data security middleware, functional safety, vehicle OTA, vehicle SOA, etc. Cockpit applications and autonomous driving applications are immune to differences or changes in hardware platforms, thus greatly improving research and development efficiency and speed.

**To optimally allocate hardware resources**, Xpeng adopts the "building blocks" approach to arrange and combine resources according to actual needs, so as to make products with optimal utilization, best performance and best experience.

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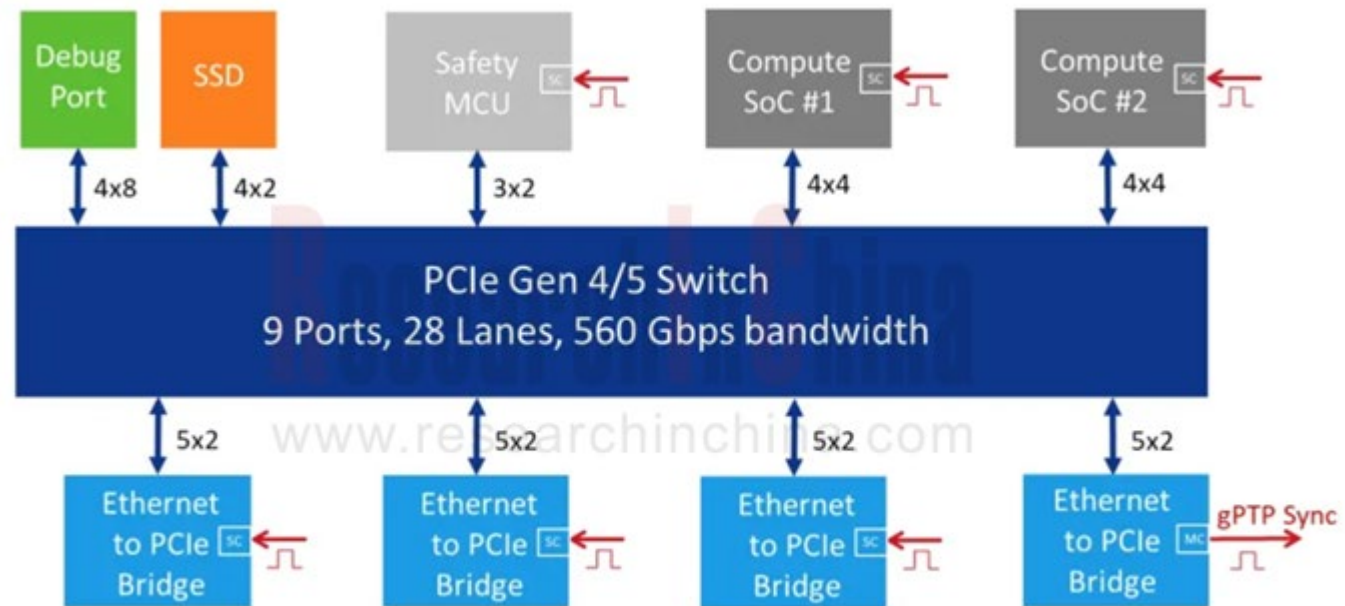


# EEA innovation: Cockpit-driving integration and integration of cockpit + driving + vehicle control are gradually becoming the mainstream, and the PCIe communication framework will be built

Under the quasi-central/central architecture, all systems that require computing resources, such as intelligent driving, cockpit, parking, power, chassis, body, and seating systems, may be concentrated in a central computing unit. Therefore, a severe challenge for automotive networks is the high-performance computing interconnection of the central computing platform itself.

According to the degree of concentration of the "central computing platform", there are "Multi-Box", "One-Box", "One-Board" and "One-SoC". In addition to breakthroughs in integrated design technology at the chip hardware level, this centralized process also relies on advances in communication technologies such as inter-board interconnection, inter-chip interconnection, and on-chip interconnection.

As shown in the figure below, 4 Ethernets are connected to the PCIe bridge. The bandwidth of these 4 ECUs is about 50Gbps, so a bridge chip or switch should be used to convert Ethernet to PCIe.

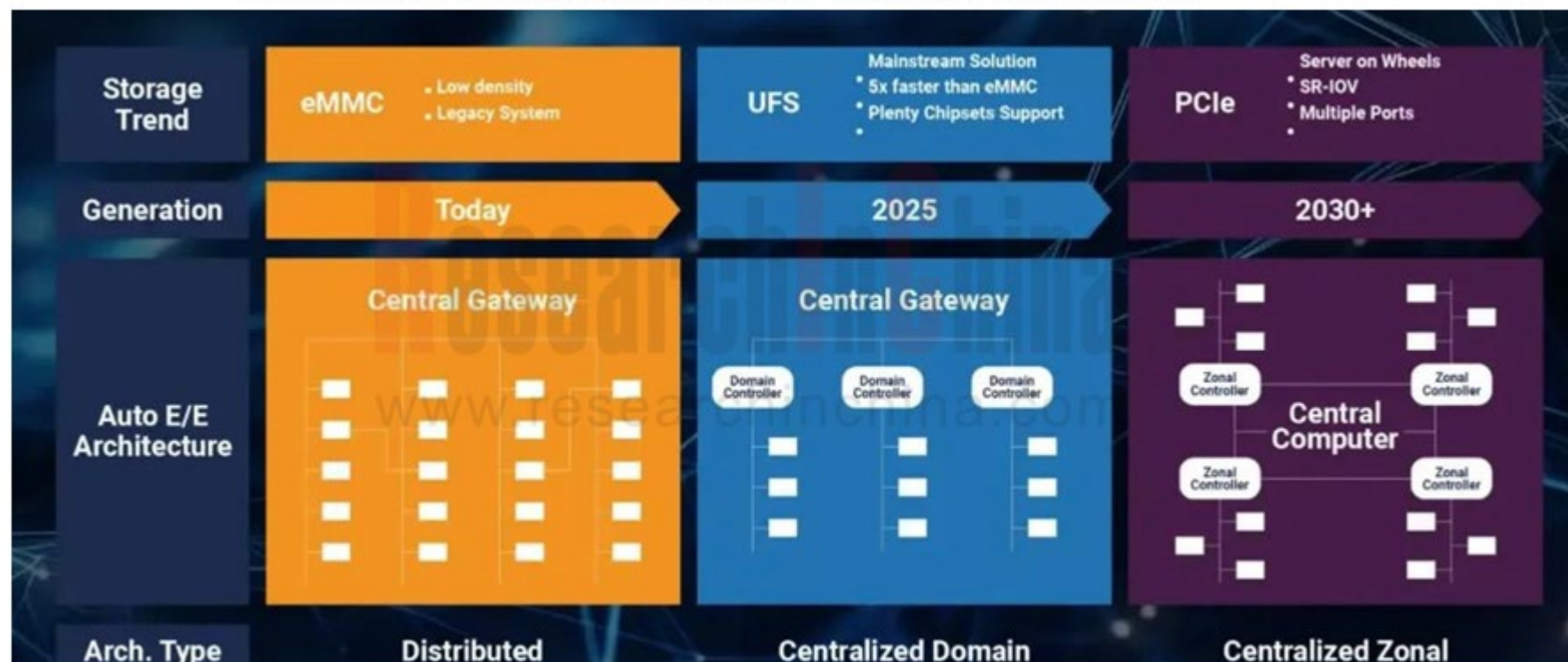


Source: Microchip

# Architecture Centralization has Promoted the Development of Data Storage Technology

Architecture centralization has promoted the development of data storage technology from traditional eMMC and UFS to more powerful PCIe 3.0 and PCIe 4.0 SSD. Large-capacity SSDs with PCIe bus will be the main form of automotive storage under zonal architectures in the future.

Evolution of Automotive EEA from eMMC→UFS→PCIe SSD in Storage Demand



Source: Phison Electronics



# Table of Content (1)

## **1 Definition, Deployment and Data Analysis of EEAs**

### **1.1 Definition Framework and Evaluation System of Automotive EEAs**

#### **1.1.1 Definition and Classification of Automotive EEAs**

#### **1.1.2 Evolution of Automotive EEAs**

#### **1.1.3 Five Evaluation Dimensions of EEAs**

### **1.2 Data Analysis: Deployment and Trends of EEAs**

#### **1.2.1 EEA Deployment and Trends in the Next Five Years**

#### **1.2.2 EEA Deployment and Trends in the Next Five Years (Appendix)**

#### **1.2.3 Major OEMs Adopting Domain Fusion Architectures and Sales Volume of Models with Such Architectures (1)**

#### **1.2.4 Major OEMs Adopting Domain Fusion Architectures and Sales Volume of Models with Such Architectures (2)**

#### **1.2.5 Major OEMs Adopting Domain Fusion Architectures and Sales Volume of Models with Such Architectures (3)**

#### **1.2.6 Major OEMs Adopting Quasi-central Computing + Zonal Architectures and Sales Volume of Models with Such Architectures**

#### **1.2.7 Major OEMs Adopting Central Computing + Zonal Architectures and Sales Volume of Models with Such Architectures**

### **1.3 EEA Deployment and Supply Chain of 25 OEMs**

#### **1.3.1 EEA Deployment and Supply Chain of 25 OEMs (1)**

#### **1.3.2 EEA Deployment and Supply Chain of 25 OEMs (2)**

#### **1.3.3 EEA Deployment and Supply Chain of 25 OEMs (3)**

#### **1.3.4 EEA Deployment and Supply Chain of 25 OEMs (4)**

#### **1.3.5 EEA Deployment and Supply Chain of 25 OEMs (5)**

#### **1.3.6 EEA Deployment and Supply Chain of 25 OEMs (6)**

#### **1.3.7 EEA Deployment and Supply Chain of 25 OEMs (7)**

#### **1.3.8 EEA Deployment and Supply Chain of 25 OEMs (8)**

#### **1.3.9 EEA Deployment and Supply Chain of 25 OEMs (9)**

#### **1.3.10 EEA Deployment and Supply Chain of 25 OEMs (10)**

## **2 Impact of EEA Upgrade and Evolution on the Supply Chain**

### **2.1 Software Upgrade: Vehicle-level Operating System**

#### **2.1.1 Automotive Operating Systems Evolve to Vehicle-level Operating Systems**

#### **2.1.2 Key to OEMs' Self-developed Vehicle OS: Upper-layer Application Ecosystem**

#### **2.1.3 Decision-making Factors of OEMs' Self-developed Vehicle OS**

#### **2.1.4 Vehicle OS Layout of OEMs (1)**

#### **2.1.5 Vehicle OS Layout of OEMs (2)**

#### **2.1.6 Vehicle OS Layout of OEMs (3)**

### **2.2 Hardware Upgrade: Traditional ECU Integrated Design Introduces Central Cross-domain SoCs**

#### **2.2.1 Usage of ECUs under Traditional Architectures**

#### **2.2.2 A Large Number of ECUs Will Be Integrated into ZCUs and HPCs amid Evolution of Automotive EEAs**

#### **2.2.3 ECU Integrated Design of OEMs amid Evolution of Automotive EEAs**

#### **2.2.4 ECU Integration Derives High-performance Central Cross-domain SoCs: SemiDrive's Body + Chassis + Power Cross-domain Fusion Chip - E3650**

#### **2.2.5 ECU Integration Derives High-performance Central Cross-domain SoCs: NXP's first 5nm automotive MCU - S32N55**

#### **2.2.6 ECU Integration Derives High-performance Central Cross-domain SoCs: NXP's first 5nm automotive MCU - S32N55**

#### **2.2.7 Cross-domain High-performance Central Computing SoCs (MCUs)**

### **2.3 Communication Upgrade: Domain Gateways → Central & Zonal Gateways**

#### **2.3.1 Gateway Deployment under "Central Computing + Zonal" Architectures: Zonal Gateways & Central Gateways**



# Table of Content (2)

- 2.3.2 Gateway Deployment under “Central Computing + Zonal” Architectures: Domain Gateways Evolve into Zonal Gateways
- 2.3.3 Gateway Deployment under “Central Computing + Zonal” Architectures: Introduction of High-performance Gateway SoCs
- 2.3.4 NXP S32G399 Cross-domain High-performance Gateway Computing Chip
- 2.3.5 SemiDrive’s G9H Gateway Chip for Cross-domain Architectures

## 2.4 Communication Upgrade: Zonal Backbone Networks, 1-2.5G High-speed Ring Network + CAN-XL/10M Low-speed Networks

- 2.4.1 Central Computing + Zonal Architectures: 10-100M/1-2.5G/10G Ethernet Backbone Networks
- 2.4.2 Central Computing + Zonal Architectures: Each Vehicle Requires at least 6-7 Ethernet Switch Chips
- 2.4.3 G-Pulse’s Zonal 2.5G Bandwidth Ring Network Architecture Design
- 2.4.4 ADI Hopes to Handle the Bus Communication Information Island through 10Base-T1S
- 2.4.5 CAN-XL/10M Automotive Ethernet Will Be Introduced into Low-speed Networks under Zonal Architectures

## 2.5 Communication Upgrade: PCIe Switches and PCIe SSD Storage Will Be Widely Used

- 2.5.1 Central Computing + Zonal Architectures: PCIe Interconnection Framework
- 2.5.2 Central Computing + Zonal Architectures: PCIe Switches and PCIe SSD Storage Will Become the Core (1)
- 2.5.3 Central Computing + Zonal Architectures: PCIe Switches and PCIe SSD Storage Will Become the Core (2)
- 2.5.4 Zonal Architecture Evolution Triggers Demand for PCIe SSD Storage
- 2.5.5 Automotive PCIe Deployment Solutions

## 2.6 Power Supply Upgrade: 48V Low-voltage Power Supply Network Innovation and Ethernet Cable (PoE) Power Supply

- 2.6.1 Next-generation Zonal Architecture PDN
- 2.6.2 From Centralized Power Distribution to 48V Distributed Power Distribution
- 2.6.3 ZCUs Simplify the Transition to 48V Electrical System Architectures
- 2.6.4 ZCUs is the Key Hub for Migration to 48V Electrical Architectures
- 2.6.5 48V PDN introduces Power over Ethernet (PoE) System
- 2.6.6 Block Diagram of PoE
- 2.6.7 Automotive PoE Players
- 2.6.8 Automotive PoE Deployment
- 2.7 Security Upgrade: Cybersecurity Protection under Zonal Architectures
- 2.7.1 Cybersecurity Challenges under Zonal Architectures
- 2.7.2 Cybersecurity Protection Solutions for Ethernet applications under Zonal Architectures

## 3 EEA, Supply Chain and Model Platform Planning of Chinese OEMs

### 3.1 Xpeng

- 3.1.1 Sales Breakdown of Models (2023-2024H1)
- 3.1.2 Sales Volume and Penetration Rate of Models with XEEA 2.0/3.0/3.5
- 3.1.3 Model Platform Planning (Xpeng & MONA Brands)
- 3.1.4 Core Vehicle Technology Platform Development Planning (1)
- 3.1.5 Core Vehicle Technology Platform Development Planning (2)
- 3.1.6 EEA Evolution: Roadmap
- 3.1.7 Cooperation with Volkswagen on CEA
- 3.1.8 Functional Modules and Supply Chain of XEEA 3.5 (1)
- 3.1.9 Functional Modules and Supply Chain of XEEA 3.5 (2)
- 3.1.10 Design of XEEA 3.5: Network Topology - 3 Computing Groups + Left and Right ZCUs (1)
- 3.1.11 Design of XEEA 3.5: Network Topology - 3 Computing Groups + Left and Right ZCUs (2)

# Table of Content (3)

- 3.1.12 Design of XEEA 3.5: Network Topology - 3 Computing Groups + Left and Right ZCUs (3)
- 3.1.13 Design of XEEA 3.5: Cross-domain Deployment Concept (1)
- .....
- 3.1.17 Design of XEEA 3.5: Cross-domain Deployment Concept (5)
- 3.1.18 Supply Chain of XEEA 3.5 - Central Supercomputing (C-DCU): Block Diagram
- 3.1.19 Supply Chain of XEEA 3.5 - Central Supercomputing (C-DCU)
- 3.1.20 Supply Chain of XEEA 3.5 - Autonomous Driving Domain Controller (XPU): Block Diagram
- 3.1.21 Supply Chain of XEEA 3.5 - Autonomous Driving Domain Controller (XPU)
- 3.1.23 Supply Chain of XEEA 3.5 - Self-developed SoC: Touring
- 3.1.24 Supply Chain of XEEA 3.5 - Development Background and Performance Estimation of Touring
- 3.1.25 Supply Chain of XEEA 3.5 - Left/Right ZCU&VIU

3.2 NIO

- 3.2.1 Model Brand Planning
- 3.2.2 Sales Breakdown of Models (2023-2024H1)
- 3.2.3 Sales Volume and Penetration Rate of Models with NT2.0/NT3.0
- 3.2.4 Model Platform Planning
- 3.2.5 Core Vehicle Technology Platform Development Planning
- 3.2.6 EEA Evolution: Roadmap
- 3.2.7 EEA: Functional Modules and Supply Chain (1)
- 3.2.8 EEA: Functional Modules and Supply Chain (2)
- 3.2.9 NT 2.0: Network Topology of New ES8
- 3.2.10 NT 2.0: Body Control Function Architecture of New ES8
- 3.2.11 Supply Chain of NT 2.0 - The Central Computing Platform (ADAM) Is Developed by NIO and Contracted by Wistron

- 3.2.12 Supply Chain of NT 2.0 - The Central Computing Platform (ADAM): Know-how
- 3.2.13 Supply Chain of NT 2.0 - The Interconnected Central Gateway (LION) Integrates the Body Domain
- 3.2.14 Supply Chain of NT 2.0 - Intelligent Chassis Domain Controller (ICC): Developed with Jingwei Hirain
- 3.2.15 Supply Chain of NT 2.0 - Autonomous Driving Software: NIO AD
- 3.2.16 Supply Chain of NT 2.0 - Digital Cockpit Software: Cockpit Platform Evolution
- 3.2.17 Supply Chain of NT 2.0 - Cockpit-wide AI Face Recognition Technology: SenseAuto
- 3.2.18 NT 3.0: "ADAM + 4 ZCUs"
- 3.2.19 NT 3.0: Architecture Topology of "ADAM + 4 ZCUs"
- 3.2.20 NT 3.0: Functional Features of "ADAM + 4 ZCUs"
- 3.2.21 Supply Chain of NT 3.0 - Cross-domain Operating System: "1+4+N" Technology Cluster of SKY OS
- 3.2.22 Supply Chain of NT 3.0 - Cross-domain Operating System: Overall System Architecture of SKY OS
- 3.2.23 Supply Chain of NT 3.0 - Cross-domain Operating System: Self-developed Kernel
- 3.2.24 Supply Chain of NT 3.0 - Cross-domain Operating System: Self-developed Middleware

3.3 Li Auto

- 3.3.1 Sales Breakdown of Models (2023-2024H1)
- 3.3.2 Sales Volume and Penetration Rate of Models with LEEA 2.0
- 3.3.3 Model Platform Planning
- 3.3.4 Core Vehicle Technology Platform Development Planning
- 3.3.5 EEA Evolution: Roadmap

# Table of Content (4)

- 3.3.6 Functional Modules and Supply Chain of LEEA 2.0 & LEEA 3.0
- 3.3.7 Supply Chain of LEEA 2.0- Autonomous Driving Domain Controller: Desay SV IPU04
- 3.3.8 Supply Chain of LEEA 2.0- Central Domain Controller (XCU)
- 3.3.9 Supply Chain of LEEA 2.0- Left and Right IO Body Domain VIU: ATECH
- 3.3.10 Supply Chain of LEEA 2.0- TSN Protocol Stack: Enjoy Move Technology
- 3.3.11 Design of LEEA 3.0: Central Computing Platform + 4 ZCUs
- 3.3.12 Supply Chain of LEEA 3.0 - CCU

## 3.4 Xiaomi Automobile

- 3.4.1 Model Platform Planning
- 3.4.2 Sales Breakdown of Models (2024H1)
- 3.4.3 Core Vehicle Technology Platform Development Planning
- 3.4.4 EEA Topology of SU7: 3 Domains + 3 ZCUs (quasi-central)
- 3.4.5 EEA Topology Diagram of SU7 - VCCD
- 3.4.6 EEA Topology Diagram of SU7 - Intelligent Driving Domain
- 3.4.7 EEA Topology Diagram of SU7 - Intelligent Cockpit Domain
- 3.4.8 EEA Topology Diagram of SU7 - Zone and Body Control
- 3.4.9 EEA Topology Diagram of SU7 - Communication Domain
- 3.4.10 EEA Supply Chain of SU7: Hyper OS Accesses AI Foundation Models

## 3.5 Models based on Huawei Smart Selection

- 3.5.1 Model Platform Planning (AITO, STELATO, LUXEED)
- 3.5.2 Sales Breakdown of AITO's Models (2023-2024H1)
- 3.5.3 AITO
  - 3.5.3.1 Model Platform Technology Development
  - 3.5.3.2 EEA Topology Diagram of M9
  - 3.5.3.3 EEA Topology Diagram of M9: VDC
  - 3.5.3.4 EEA Topology Diagram of M9: MDC

- 3.5.3.5 EEA Topology Diagram of M9: Cockpit Domain & Chassis Domain
- 3.5.3.6 EEA Topology Diagram of M9: VIU1
- 3.5.3.7 EEA Topology Diagram of M9: VIU2
- 3.5.3.8 EEA Topology Diagram of M9: VIU3
- 3.5.3.9 EEA Topology Diagram of M9: Electric Drive & High Voltage System
- 3.5.3.10 EEA Topology Diagram of M9: VCU and Power Management Strategy
- 3.5.3.11 EEA Supply Chain of M9 - ZCU: Huawei VIU
- 3.5.3.12 EEA Supply Chain of M9 - Autonomous Driving Software: Huawei ADS 3.0
- 3.5.3.13 EEA Supply Chain of M5/M7 - Cockpit Domain Controller
- 3.5.4 LUXEED
  - 3.5.4.1 EEA Design of S7: Autonomous Driving Domain
  - 3.5.4.2 EEA Design of S7: Intelligent Cockpit Domain
  - 3.5.4.3 EEA Design of S7: Chassis Domain
  - 3.5.4.4 EEA Design of S7: Electric Drive System
  - 3.5.4.5 EEA Design of S7: High and Low Voltage System

## 3.6 Neta

- 3.6.1 Sales Breakdown of Models (2023-2024H1)
- 3.6.2 Model Platform Planning
- 3.6.3 Sales Volume and Penetration Rate of Models with Shanghai 1.0/2.0
- 3.6.4 Technology Development Planning
- 3.6.5 EEA Evolution: Roadmap
- 3.6.6 Functional Modules and Supply Chain of Shanghai 2.0 (Gen.1)
- 3.6.7 Functional Modules and Supply Chain of Shanghai 2.0 (Gen.2)
- 3.6.8 Functional Modules and Supply Chain of Shanghai 2.0
- 3.6.9 Design of Shanghai 2.0: Central Computing Platform + ZCUs
- 3.6.10 Design of Shanghai 2.0: Demand for Communication Middleware in Cross-domain Integration

Table of Content (5)

3.6.11 Supply Chain of Shanhai 2.0: Neta’s Self-developed Haozhi Central Supercomputing Platform

3.6.12 Supply Chain of Shanhai 2.0 (Gen.1): Integrated Domain Control System

3.6.13 Supply Chain of Shanhai 2.0: Haozhi Supercomputing XPC-S32G

3.6.14 Supply Chain of Shanhai 2.0: Central Domain Control (Intelligent Driving + Intelligent Control)

.....

3.7 Leapmotor

3.7.1 Sales Breakdown of Models (2023-2024H1)

3.7.2 Model Platform Planning

3.7.3 Sales Volume and Penetration Rate of Models with LEAP2.0/LEAP3.0

3.7.4 Core Vehicle Technology Platform Development Planning

3.7.5 LEAP 3.0: "Four-Leaf Clover" Central Integrated EEA

3.7.6 EEA: Roadmap

3.7.7 Design of LEAP 3.0: HPC + 3 ZCUs

3.7.8 Design of LEAP 3.0: Functional Integration of Different Domains

3.7.9 Design of LEAP 3.0: 70% of the Vehicle Is Self-developed and Manufactured

3.7.10 Design of LEAP 3.0: High Communication Rate & Senseless OTA

3.7.11 Design of LEAP 3.0: System Topology

3.7.12 Design of LEAP 3.0: Technology Licensing

3.7.13 Functional Modules and Supply Chain of LEAP 3.0

.....

3.8 Voyah

3.8.1 Model Platform Planning of Dongfeng Forthing

3.8.2 Sales Breakdown of Forthing’s Models (2023-2024H1)

3.8.3 Model Platform Planning of Dongfeng Group (Dongfeng Nammi, etc)

3.8.4 Dongfeng's Brand Model Planning

3.8.5 Voyah's Model Platform Planning

3.8.6 Sales Breakdown of Voyah’s Models (2023-2024H1)

3.8.7 Voyah’s Core Vehicle Technology Platform Development Planning

3.8.8 Voyah's EEA Roadmap

3.8.9 Functional Modules and Supply Chain of Voyah “Tianyuan” EEA

3.8.10 Design of Voyah “Tianyuan” Centralized Architecture: ESSA+SOA

3.8.11 Design of Voyah “Tianyuan” Centralized Architecture: A Central Controller (OIB) + 4 ZCUs (VIUs)

3.8.12 Design of Voyah “Tianyuan” Centralized Architecture: System Topology Design

3.8.13 Design of Voyah “Tianyuan” Centralized Architecture: Physical Architecture Design

3.8.14 Design of Voyah “Tianyuan” Centralized Architecture: SOA Software Architecture

3.8.15 Design of Voyah “Tianyuan” Centralized Architecture: Network and Communication Architecture Design

.....

3.9 Geely

3.9.1 Brand Layout

3.9.2 ZEEKR’s Model Platform Planning

3.9.3 Sales Breakdown of ZEEKR’s Models (2023-2024H1)

3.9.4 Geely’s Model Platform Planning (smart Wizard, Galaxy, Jiyue)

3.9.5 Sales Breakdown of smart Wizard’s Models (2023-2024H1)

3.9.6 Sales Breakdown of smart Galaxy’s Models (2023-2024H1)

3.9.7 Geely’s Model Platform Planning (Lynk & Co)

3.9.8 Sales Breakdown of smart Lynk & Co’s Models (2023-2024H1)

3.9.9 Geely’s Model Platform Planning (Livan)

3.9.10 Sales Breakdown of smart Livan’s Models (2023-2024H1)

3.9.11 Sales Breakdown of smart Geely’s Models (2023-2024H1)

3.9.12 Geely’s Overall Development Planning

3.9.13 Sales Volume and Penetration Rate of Models with GEEA 2.0 (1)

# Table of Content (6)

- 3.9.14 Sales Volume and Penetration Rate of Models with GEEA 2.0 (2)
- 3.9.15 Geely Independent
  - 3.9.15.1 Core Vehicle Technology Platform Development Planning
  - 3.9.15.2 Core Vehicle Technology Platform Development Planning
  - .....
  - 3.9.15.14 Supply Chain of GEEA 2.0 - Cross-domain Software System: ECARX Cloudpeak
  - 3.9.15.15 Supply Chain of GEEA 2.0 - Body Domain Controller: OFILM BGM
  - 3.9.15.16 GEEA 3.0 (Central Computing Platform Architecture)
  - 3.9.15.17 Design of GEEA 2.0: Software System Topology
  - 3.9.15.18 Design of GEEA 2.0: GeelyOS (SOA-based Operating System)
  - 3.9.15.19 Design of GEEA 2.0: GOS - Multi-protocol Multi-OS Compatible
  - 3.9.15.20 Design of GEEA 2.0: Developer Platform and Toolchain
  - 3.9.15.21 Design of GEEA 2.0: Agile Development with Continuous Iteration
- 3.9.16 ZEEKR
  - 3.9.16.1 Core Vehicle Technology Platform Development Planning
  - .....
  - 3.9.16.17 Supply Chain of EE 3.0: Central Control Domain and Software Function Deployment
  - 3.9.16.18 Supply Chain of EE 3.0: ZCU
  - 3.9.16.19 Supply Chain of EE 3.0: ZCU, Intelligent Power Distribution Design
  - 3.9.16.20 Supply Chain of EE 3.0: OTA Architecture Solution
- 3.10 SAIC (IM, Rising Auto, MG, etc.)
  - 3.10.1 Brand Layout
  - 3.10.2 Sales Volume and Penetration Rate of Models with Galaxy Full Stack 1.0/3.0
  - 3.10.3 IM's Model Platform Planning
  - 3.10.4 Sales Breakdown of IM's Models (2023-2024H1)
  - 3.10.5 IM's Core Vehicle Technology Platform Development Planning

- 3.10.6 Rising Auto's Model Platform Planning
- 3.10.7 Sales Breakdown of Rising Auto's Models (2023-2024H1)
- 3.10.8 Rising Auto's Core Vehicle Technology Platform Development Planning
- 3.10.9 G's Model Platform Planning
- 3.10.10 Sales Breakdown of MG's Models (2023-2024H1)
- 3.10.11 EA Evolution: Z-One Galaxy Full Stack Roadmap
- 3.10.12 EA Evolution: Z-One Galaxy Full Stack Technology Planning
- 3.10.13 Functional Modules and Supply Chain of Z-One Full Stack Solution 1.0 & 3.0
- 3.10.14 Supply Chain of Z-One Full Stack Solution 1.0 - Intelligent Driving Domain Block Diagram
- 3.10.15 Supply Chain of Z-One Full Stack Solution 1.0 - Intelligent Driving Domain: Technomous iECU (Xavier SoC)
- 3.10.16 Supply Chain of Z-One Full Stack Solution 1.0 - Body Domain Block Diagram
- 3.10.17 Supply Chain of Z-One Full Stack Solution 1.0 - Intelligent Cockpit Domain Block Diagram of IMOS 1.0/2.0
- 3.10.18 Design of Z-One Full Stack Solution 3.0: HPC + 4 ZCUs (Quasi-central)
- .....

- 3.11 ARCFOX
  - 3.11.1 Brand Layout of BAIC Group
  - 3.11.2 Model Platform Planning of BAIC Group (ARCFOX, BAIC)
  - 3.11.3 Sales Volume and Penetration Rate of Models with IMC/BE21
  - 3.11.4 Sales Breakdown of ARCFOX's Models (2023-2024H1)
  - 3.11.5 ARCFOX's EEA Evolution Roadmap
  - 3.11.6 BAIC Lingzhi OS

- 3.12 Changan Automobile
  - 3.12.1 Brand layout
  - 3.12.2 Model Platform Planning (Avatr, Deepal, Nevo)



- 3.12.3 Sales Breakdown of Avatr's Models (2023-2024H1)
- 3.12.4 Sales Breakdown of Deepal's Models (2023-2024H1)
- 3.12.5 Sales Breakdown of Nevo's Models (2023-2024H1)
- 3.12.6 EEA Evolution: Roadmap
- 3.12.7 Design of EPA 1: Development History
- 3.12.8 Design of EPA 1: Three-domain Architecture & SOA Service Expansion
- 3.12.9 Design of EPA 1: Electronic and Electrical System Block Diagram
- .....
- 3.12.21 SDA Design: Software Development Process: AI Foundation Models Integrated
- 3.12.22 SDA Design: Backbone Network Communication Design
- 3.12.23 SDA Design: Service-oriented Communication (SOMEIP&DDS) Design
- 3.12.24 SDA Design: AGI's Generating Capability Enhances Data Productivity, and Reconstructs R&D Paradigm and Cooperation Ecology
- 3.12.25 SDA Design: VDP - Smart Vehicle Cloud Platform
- 3.12.26 SDA Design: Cloud Big Data Layer
- 3.12.27 Avatr
  - 3.12.27.1 EEA Design of Avatr 11: Vehicle Network Topology Diagram
  - 3.12.27.2 EEA Design of Avatr 11: Intelligent Cockpit Domain Network Topology Diagram
  - 3.12.27.3 EEA Design of Avatr 11: Intelligent Driving Domain Network Topology Diagram
  - 3.12.27.4 EEA Supply Chain of Avatr 11: Huawei MDC Platform Software Architecture
  - 3.12.27.5 EEA Supply Chain of Avatr 11: Huawei AOS
  - 3.12.27.6 EEA Supply Chain of Avatr 11: Huawei VOS
  - 3.12.27.7 EEA Supply Chain of Avatr 11: Digital Cockpit System

## 3.13 GAC

- 3.13.1 Brand layout
- 3.13.2 Model Platform Planning (Aion, Hyper)
- 3.13.3 Sales Breakdown of Aion's Models (2023-2024H1)
- 3.13.4 Sales Breakdown of Hyper's Models (2023-2024H1)
- 3.13.5 Core Vehicle Technology Platform Development Planning
- 3.13.6 AION AEP 3.0
- 3.13.7 Aion's EEA Evolution: Roadmap
- 3.13.8 GA 3.0 ("X-Soul" Architecture)
- 3.13.9 Design of GA 3.0: 3 Domains + 4 Body ZCUs
- 3.13.10 GAC GA3.0 "X-Soul" Architecture Design: Hardware System Design Block Diagram
- 3.13.11 GAC GA3.0 "X-Soul" Architecture Design: three HPCs
- 3.13.12 GAC GA3.0 "X-Soul" Architecture Design: Autonomous Driving Domain
- 3.13.13 GAC GA3.0 "X-Soul" Architecture Design: Central Computing Domain
- 3.13.14 GAC GA3.0 "X-Soul" Architecture Design: Vehicle Dual Power Supply Design (1)
- .....
- 3.13.27 GAC GA3.0 "X-Soul" Architecture Supply Chain - ADiGO SPACE cockpit OS Development History
- 3.13.28 GAC GA3.0 "X-Soul" Architecture Supply Chain - "Zhixing 2027" Intelligent Cockpit Roadmap
- 3.13.29 GAC GA3.0 "X-Soul" Architecture Supply Chain - ADiGO PILOT Perception Algorithm: using SenseTime BEV Perception Algorithm
- 3.13.30 GAC GA3.0 "X-Soul" Architecture Supply Chain - End-Cloud Integrated AI Model
- 3.13.31 GAC GA3.0 "X-Soul" Architecture Supply Chain - End-Cloud Integrated AI Model Agent



# Table of Content (8)

- 3.13.32 GAC GA3.0 “X-Soul” Architecture Supply Chain - SOA Software Platform
- 3.13.33 GAC GA3.0 “X-Soul” Architecture Supply Chain - SOA Software Platform, User Co-creation Platform
- 3.13.34 GAC GA3.0“X-Soul” Architecture Supply Chain - GAC Rubik's Cube Scenario Co-creation Platform

## 3.14 BYD

- 3.14.1 BYD Brand Layout
- 3.14.2 Model Platform Planning (Yangwang, Fangchengbao)
- 3.14.3 Model Platform Planning (DENZA series)
- 3.14.4 Sales Breakdown of DENZA Models (2023-2024H1)
- 3.14.5 Model Platform Planning (BYD)
- .....
- 3.14.32 BYD e3.0 EEA Supply Chain - Vehicle Computing Power Platform (based on ORIN-X): BYD Self-developed
- 3.14.33 BYD e3.0 EEA Supply Chain - "Eye of the Gods" Autonomous Driving System: BYD + Momenta
- 3.14.34 BYD e3.0 EEA Supply Chain - Smart Cockpit Domain: Mostly adopts Consumer-level Chips, FinDreams Technology Integrates
- 3.14.35 BYD e3.0 EEA Supply Chain -Intelligent Cockpit Domain: partially equipped with Meig Smart Module SRM930

## 3.15 FAW Group

- 3.15.1 Brand Layout
- 3.15.2 Model Platform Planning
- 3.15.3 Sales Breakdown of Hongqi Brand (2023-2024H1)
- 3.15.4 Technical Planning
- 3.15.5 Core Vehicle Technology Platform Development Plan
- .....

- 3.15.21 FAW Hongqi FEEA3.0 Design: System Block Diagram of Rear Intelligent Zonal Controller
- 3.15.22 FAW Hongqi FEEA3.0 Supply Chain - Autonomous Driving Domain: Freetech ADC30
- 3.15.23 FAW Hongqi FEEA3.0 Supply Chain -Intelligent Cockpit Domain: Based on Qualcomm 8155, SOA Architecture
- 3.15.24 FAW Hongqi FEEA3.0 Supply Chain - TSN Ethernet and Zonal Gateway Architecture: Hinge Technology
- 3.15.25 FAW Hongqi FEEA3.0 Supply Chain - Cockpit-Driving Integration: Black Sesame Intelligent Wudang C1200 + JoyNext

## 3.16 Chery Automobile

- 3.16.1 Brand Layout
- 3.16.2 Model Platform Planning (JETOUR, EXEED series)
- 3.16.3 Sales Breakdown of EXEED Brand (2023-2024H1)
- 3.16.4 Core Vehicle Technology Platform Development Plan
- 3.16.5 EEA Evolution Roadmap

## 3.17 Great Wall Motors

- 3.17.1 Brand Layout
- 3.17.2 Sales and Penetration Rate of Models under GEEP 3.0 EEA
- 3.17.3 Model Platform Planning (Ora, Tank series)
- 3.17.4 Sales Breakdown of Ora Model (2023-2024H1)
- .....
- 3.17.14 GEEP 4.0 Quasi-Central EEA Design: Cockpit-Driving Integrated Central Computing + 3 ZCUs + SOA Software Topology
- 3.17.15 GEEP 4.0 Quasi-Central EEA Design: Hardware Topology
- 3.17.16 GEEP 4.0 Quasi-Central EEA Supply Chain - Central Computing Unit CCU
- 3.17.17 GEEP 4.0 Quasi-Central EEA Supply Chain - VIU

# Table of Content (9)

- 3.17.18 GEEP 4.0 Quasi-Central EEA Supply Chain - SOA Software Framework (1)
- 3.17.19 GEEP 4.0 Quasi-Central EEA Supply Chain - SOA Software Framework (2)
- 3.17.20 GEEP 4.0 Quasi-Central EEA Supply Chain - Security Architecture
- 3.17.21 GEEP 5.0 Central Computing EEA: One Brain

## 4 EEA, Supply Chain and Model Platform Planning of Foreign OEMs

### 4.1 Tesla

- 4.1.1 EEA Evolution: Roadmap
- 4.1.2 2nd GEN Quasi-Central Architecture Design: EEA Topology
- 4.1.3 2nd GEN Quasi-Central Architecture Design: Zonal Functional Division
- 4.1.4 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Zonal Location Distribution
- 4.1.5 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Front Body Domain (1)
- 4.1.6 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Front Body Domain (2)
- 4.1.7 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Left & Right Body Domain (1)
- 4.1.8 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Left & Right Body Domain (2)
- 4.1.9 2nd GEN Quasi-Central Architecture Design: Model 3 1st GEN Zonal Architecture Technical Characteristics
- 4.1.10 2nd GEN Quasi-Central Architecture Design: Model Y 3rd GEN Zonal Architecture
- 4.1.11 2nd GEN Quasi-Central Architecture Design: Model Y 3rd GEN Zonal Architecture and Integrated Gateway
- 4.1.12 2nd GEN Quasi-Central Architecture Design: Model S plaid 4th GEN Zonal Architecture

4.1.13 2nd GEN Quasi-Central Architecture Supply Chain: HW1.0 - HW4.0 Autonomous Driving Domain Control Evolution

4.1.14 2nd GEN Quasi-Central Architecture Supply Chain: Cockpit MCU (1)

4.1.15 2nd GEN Quasi-Central Architecture Supply Chain: Cockpit MCU (2)

4.1.16 2nd GEN Quasi-Central Architecture Supply Chain: Evolution of MCU Cockpit Platform

4.1.17 Tesla Cybertruck EEA: Introducing 48V Low Voltage Power Supply Network and Power over Ethernet

### 4.2 BMW

4.2.1 Model Platform Planning

4.2.2 Sales Proportion of BMW Brilliance Models (2023-2024H1)

4.2.3 Core Vehicle Technology Platform Development Planning

4.2.4 EEA Evolution: Roadmap

4.2.5 Multi-Domain EEA Design: Topology Diagram

4.2.6 Multi-Domain EEA Design: The Concrete Meaning of Nodes in Architecture Topology

4.2.7 Multi-Domain EEA Design: Ethernet Communication Node

4.2.8 Multi-Domain EEA Design: ADAS System Architecture and Node Meaning

4.2.9 Multi-Domain EEA Design: the new G68 platform - Autonomous Driving and Cockpit System Framework Diagram

4.2.10 Multi-Domain EEA Design: the new G68 platform - Chassis System Framework Diagram

4.2.11 Multi-Domain EEA Design: New G68 Platform - FlexRay Bus

4.2.12 Multi-Domain EEA Design: New G68 Platform - High Voltage Electrical Block Diagram

4.2.13 Multi-Domain EEA Supply Chain - Body Electronics (1): Evolution

4.2.14 Multi-Domain EEA Supply Chain - Body Electronics Domain (2): Integrated Central Gateway

# Table of Content (10)

- 4.2.15 Multi-Domain EEA Supply Chain - Body Electronics Domain (3): BOM Disassembly
- .....
- 4.2.29 "Central Computing + Zonal" EEA Design: Vehicle Communication Network Design, Application of E2B under Zonal Architecture
- 4.3 Mercedes-Benz**
- 4.3.1 Model Platform Planning
- 4.3.2 Beijing Benz Automobile Model Sales Proportion (2023-2024H1)
- 4.3.3 EEA Evolution: Roadmap
- 4.3.4 Functional Domain Architecture Design
- 4.3.5 STAR3 Domain EEA Design: Network Topology Connection
- 4.3.6 STAR3 Domain EEA Design: High-speed Communication Bandwidth
- 4.3.7 STAR3 Domain EEA Design: Automotive Ethernet Network Topology
- 4.3.8 STAR3 Domain EEA Design: Service-Oriented Communication (1)
- .....
- 4.3.18 STAR3 Domain EEA Supply Chain - Self-developed Mercedes-Benz MB. OS
- 4.4 Volkswagen**
- 4.4.1 Model Platform Planning
- 4.4.2 New Energy Modular Platform Planning
- 4.4.3 Models Sales Breakdown (2023-2024H1)
- 4.4.4 Platform Technology Development Trend
- 4.4.5 EEA Evolution: MQB - MEB - SSP
- 4.4.6 MEB EEA Evolution: E (3) 1.1/1 2/2.0
- 4.4.7 E<sup>3</sup> 2.0 EEA Design: Development Progress
- 4.4.8 E<sup>3</sup> 2.0 EEA Design: Software Iteration
- .....
- 4.4.34 E<sup>3</sup> EEA Design: SOA Software Architecture (3)

- 4.4.35 E<sup>3</sup> EEA Design: Cloud Service Architecture
- 4.4.36 E<sup>3</sup> EEA Design: Cyber security Architecture
- 4.4.37 Volkswagen (China) EEA Supply Chain: Volkswagen (China) R & D Hub "100% TechCo" Project
- 4.4.38 Volkswagen (China) EEA Supply Chain: Three Models R & D Lines
- 4.4.39 Volkswagen (China) EEA Supply Chain: Joint Development of Zonal Control + Quasi-Central Computing Architecture with Xiaopeng
- 4.4.45 Volkswagen (China) EEA Supply Chain: Volkswagen CARIAD and VCTC Lead Integration of Chinese Software Development Resources
- 4.4.46 Volkswagen (China) EEA Supply Chain: Volkswagen CARIAD's "In China, for China" Development Strategy
- 4.4.47 Volkswagen (China) EEA Supply Chain: Volkswagen CARIAD Cockpit ID OS
- 4.4.48 Volkswagen (China) EEA Supply Chain: Digital Cockpit Software, Strengthening R&D with Chinese Suppliers
- 4.4.49 Volkswagen (China) EEA Supply Chain: Autonomous Driving Software, Strengthening Cooperation with Chinese Suppliers
- 4.4.50 Volkswagen (China) EEA Supply Chain: Autonomous Driving Software, Strengthening Cooperation with Chinese Suppliers
- 4.4.51 Volkswagen (China) EEA Supply Chain: Evolution of VW. OS
- 4.4.52 Volkswagen (China) EEA Supply Chain: VW. OS Transforms from Self-Research to Collaborative R & D
- 4.4.53 Volkswagen (China) EEA Supply Chain: Continental Body HPC
- 4.5 Volvo**
- 4.5.1 EEA Evolution: Technical Route
- 4.5.2 SPA1 EEA Design: Topology Diagram
- 4.5.3 SPA1 EEA Design: Communication Network Design
- 4.5.4 SPA1 EEA Design: Body Domain Design

# Table of Content (11)

- 4.5.5 SPA1 EEA Design: Body Domain Design, Communication Architecture Design of CEM Module
- 4.5.6 SPA2 EEA Design: Using 3 Computing Units + VIU
- 4.5.7 SPA2 EEA Design: System Topology Diagram (1)
- 4.5.8 SPA2 EEA Design: System Topology Diagram (2)
- 4.5.9 SPA2 EEA: Introduction of Gigabit Ethernet and TSN
- 4.5.10 SPA2 EEA Design: Zonal Controller VIU Design Integrated Gateway
- 4.5.11 SPA2 EEA Design: Introducing SOA Software Architecture
- 4.5.12 SPA2 EEA Supply Chain - In house Core Development Team Established in China

## 4.6 Ford Motor

- 4.6.1 EEA Evolution: Roadmap
- 4.6.2 FNV EEA
- 4.6.3 FNV EEA Design: Smart Connected Blue Oval Intelligence
- 4.6.4 FNV EEA Design: Communication Architecture
- 4.6.5 FNV EEA Supply Chain: Cockpit Platform Evolution
- 4.6.6 FNV EEA Supply Chain: Next Generation in-Vehicle Infotainment System

## 4.7 General Motors

- 4.7.1 Model Platform Planning (Buick, Cadillac, Chevrolet series)
- 4.7.2 GM Model Sales Share (2023-2024H1)
- 4.7.3 EEA Evolution: Technical Route
- 4.7.4 Automotive Global A and Global B EEA Comparison
- 4.7.5 GM Global A and Global B EEA Comparison
- 4.7.6 GM VIP Intelligent Electronics Architecture
- 4.7.7 GM VIP Intelligent Electronics Architecture: Key Technical Features

## 4.8 Stellantis

- 4.8.1 Cooperates with Leapmotor: Leapmotor International is Established and Plans to land a factory in Europe
- 4.8.2 Cooperates with Leapmotor: Introducing Leapmotor LEAP 3.0 Architecture
- 4.8.3 Cooperates with Leapmotor: First to Import C10 and T03 Models through Leapmotor International
- 4.8.4 Cooperates with Leapmotor: Based on Leapmotor LEAP 3.0, a variety of new cars will be developed one after another
- 4.8.5 STLA Brain Quasi-Central EEA Design: HPC and Zonal Controllers
- 4.8.6 STLA Brain Quasi-Central EEA Design: Three Technology Platforms
- 4.8.7 STLA Brain Quasi-Central EEA Design: Software Business Strategy
- 4.8.8 STLA Brain Quasi-Central EEA Design: Software System Architecture
- 4.8.9 STLA Brain quasi-central EEA Design: STLA Smart Cockpit
- 4.8.10 STLA Brain quasi-central EEA Design: STLA Auto Drive



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