

The role of software as an economic factor for Baden-Württemberg's automotive industry

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Executive Summary

This paper explores the growing importance of software as an economic factor for Baden-Württemberg's automotive industry. It highlights the region's strong industrial base and examines the shift from hardware-driven engineering to software-defined vehicles (SDVs), emphasizing their impact on vehicle architecture, digital mobility ecosystems, and new forms of value creation. As software becomes central to mobility, established OEMs, suppliers, and other players must adapt to evolving business models and competitive dynamics. The paper also addresses how this transformation fosters both collaboration and competition, and how shared standards and open-source approaches can support innovation. In its second part, the paper showcases networks and collaborative projects that help regional stakeholders meet technological and strategic challenges.

Infotainment systems and trends, V2V V2I and V2P Communication, Autonomous xEV, international networking, public policy and promotion

1 Introduction

The automotive industry is one of the most important economic sectors in Germany and is currently undergoing a fundamental transformation. This includes the electrification of the powertrain, the increasing digitalization and automation of vehicles, and the transition toward software-defined vehicles (SDVs) [6]. These developments are not only reshaping the technical architecture of vehicles but also unlocking entirely new value creation opportunities and business models.

As a traditional automotive cluster, Baden-Württemberg is therefore strongly affected by this change. The region's well-established network of Original Equipment Manufacturers (OEMs), suppliers, technology providers, and research institutions must now adapt to the rising importance of software and data-driven innovation. Successfully managing this transformation requires close cooperation across sectors and the integration of diverse competencies, from mechanical engineering and electrical systems to software development, AI, and cloud services. The vision of the future automotive and mobility industry is networked, sustainable, and digital, evolving into an application-oriented ecosystem that reaches far beyond the vehicle itself. [5]

This paper explores the role of software as a key economic driver for Baden-Württemberg's automotive industry. It begins with an overview of the region's automotive landscape, followed by an examination of the vehicle's changing role within the digital ecosystem. Key topics include the transition to software-defined mobility, the potential for value creation beyond the vehicle, and the interplay between cooperation and competition. The paper highlights selected networks and projects that are actively

supporting this transformation, demonstrating how Baden-Württemberg can leverage its strengths to remain competitive in the future mobility landscape.

2 Automotive Industry in Baden-Württemberg

Due to the global transformation of the automotive industry, innovation and value creation structures are changing or being newly established. [4] The automotive industry is a key sector in Baden-Württemberg with an annual turnover of over 135 billion euros and around 225,000 employees. It plays an important role in research and development (R&D), accounting for more than half of the state's R&D expenditure at over 13 billion euros. In total, more than 480,000 people are employed directly and indirectly in the automotive industry, which corresponds to almost 11% of all employees subject to social insurance contributions in Baden-Württemberg. [4] The automotive cluster has established itself as a leading innovation center for vehicle production, with product development, final assembly and the manufacture of components and parts by the supplier industry playing a central role. The region is particularly strong in product and process innovation. The activity in the field of automated driving and the associated research and development activities of Baden-Württemberg players can be identified via the patent applications at the European Patent Office. In the area of patent activities between 2010 and 2022 for radar, camera and LiDAR for automated vehicles, Baden-Württemberg companies are among the top 10 worldwide. [4] The transformation of the automotive industry towards electromobility and SDV requires extensive investment. Nevertheless, investments by manufacturers and suppliers in Baden-Württemberg have decreased in recent years. In addition, the need for additional industrial space to produce these new technologies poses a considerable challenge, as there is only limited space available in the region. [4] It is of crucial importance for Baden-Württemberg as an automotive location that new competencies are developed in the relevant areas and that medium-sized suppliers also participate in future value creation opportunities. [6]

3 Vehicles as a part of the digital mobility ecosystem

Digitalization is driving forward the connectivity of vehicles and infrastructure, thereby enabling new mobility solutions. This connectivity creates new possibilities for traffic control and for increasing safety and comfort. Vehicles communicate not only with each other, but also with the traffic infrastructure in real time, which provides the basis for connected and highly automated vehicles. Technologies such as communication, sensors and AI-supported data analysis are crucial for this development. [4] Software enables various vehicle-related services. This requires the smooth integration of various subsystems into the vehicle. For example, driver assistance systems must process information from the sensors and cloud information in fractions of a second and communicate it to the powertrain or the infotainment system. Linking these different domains leads to challenges in terms of development, functional speed and cyber security. [5]



Figure 1: Digital Mobility Ecosystem (c) e-mobil BW / touchwert

3.1 Changes to vehicle architecture

Automotive software is leading to a significant change in the product architecture of vehicles. Where previously the engine was the technological heart of the vehicle, software is now taking over this central role. [10] Electrical/electronic (E/E) architectures encompass the entire electrical and electronic power supply of a vehicle. Electrically controlled components and their communication are coordinated in the E/E architecture. This includes communication between the installed components as well as communication with the vehicle ecosystem. The installed hardware is controlled and managed via operating systems. As the range of functions and complexity of vehicles increases, this architecture is gaining in importance, which also affects the development of hardware and software. Due to the growing number of functions and ECUs in modern vehicles, problems arise such as high space requirements, cabling effort and duplication of functions, which impair efficiency and synergy potential. This pushes the architecture to its economic and technological limits in terms of cost, weight, and required installation space. These challenges and the increasing requirements of new technologies such as automated driving are forcing a change in the E/E architecture. [7]

Previously, E/E vehicle architectures have been predominantly decentralized with numerous electronic control units (ECUs). To reduce this complexity and bundle ECUs in a few zones, car manufacturers are working on developing centralized architectures. This is done using central high-performance processors and local data processing (edge computing). This approach ensures simpler design, greater efficiency and scalability as, for example, the individual programming effort and material costs are reduced. At the same time, a backend platform (cloud) networked with the vehicle is required. This cloud enables the exchange of large amounts of data and thus, for example, standardized over-the-air (OTA) software updates, Vehicle-2-X communication and digital service offerings. A stable, standardized vehicle operating system integrates the various subsystems of the vehicle (e.g. infotainment, Advanced Driver Assistance Systems (ADAS)). [5] Together with the standardized software architecture, it is essential for significantly accelerating the development processes of

new vehicles and making them more efficient. [10]

3.2 From software-defined vehicles to software-defined mobility

Communication between vehicles, other road users and the infrastructure takes place via wireless technologies and comprises various forms: Car2Car (vehicle to vehicle), Car2Infrastructure (vehicle to infrastructure), Car2Backend (vehicle to central data center) and Car2X (vehicle to anything). These technologies enable the rapid transmission of information, for example to avoid accidents or traffic jams. They use cellular and Wi-Fi technologies, with 5G being the key technology. In addition to optimizing the vehicles' external communication possibilities, internal data transmission in the vehicle must also be improved. To this end, the aim is to implement Automotive Ethernet to enable lightwave-based, real-time data recognition, processing and analysis. [4]

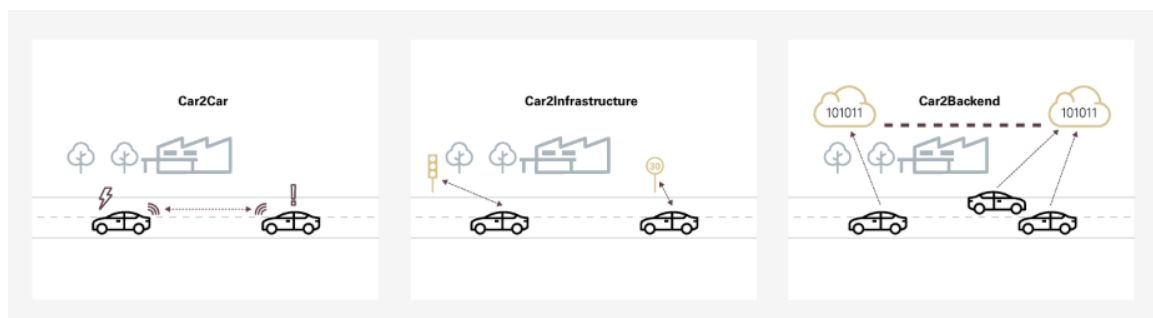


Figure 2: Car2Car-, Car2Infrastructure and Car2Backend-Communication (Source [4])

To enable automated driving, components and systems are also required that allow precise and error-free navigation and positioning of the vehicle. For position determination, the vehicle's absolute position is combined with its relative position in the high-resolution road network. The absolute position is typically determined via a satellite-based receiver (e.g. GPS), while the relative position is derived from the vehicle's inertial sensors. Additionally, position determination can be enhanced through trilateration and by combining different communication methods, such as Wi-Fi and mobile networks, to verify and secure the positions detected by the surrounding sensors. [4]

3.3 Value creation potential beyond the vehicle

With the digital transformation of the automotive sector, new value creation opportunities are emerging that go far beyond traditional vehicle sales. The intensive networking of vehicles with their environment, enabled by sensors, connectivity modules, and cloud infrastructures, combined with access to real-time data, allows OEMs (Original Equipment Manufacturers) and OES (Original Equipment Suppliers) to establish service-based business models that create ongoing and scalable revenue streams. Central to this shift are technologies such as Over-the-Air (OTA) updates and Functions on Demand. These enable manufacturers to deliver feature enhancements, security patches, or entirely new functions remotely, even after the vehicle has been sold. Thus, monetization is no longer tied to the point of sale but extends across the entire vehicle lifecycle. This opens opportunities for continuous customer engagement and for tapping into new digital business models, which range from subscription-based features to maintenance services. [7]

Beyond vehicle-centric services, the market for mobility services represents another rapidly developing area of value creation. According to the Mobility Services Report 2024 [1], there are four main categories in this space: **ridehailing, carsharing, autonomous mobility services, and micromobility**:

- The **ridehailing sector**, which includes digital taxi platforms, chauffeur services, and shuttle-on-demand offerings, is currently one of the most dynamic. Many providers are emerging from an initial phase of limited market acceptance and are now achieving profitability, particularly through the development of super-apps that integrate multiple mobility services into a single digital platform. These platforms are especially strong in markets like the USA, China, and Southeast Asia.

- **Carsharing** includes different types of services, such as station-based car sharing, free-floating car sharing, and peer-to-peer car sharing. It shows signs of stagnation or decline. OEMs are gradually retreating from this segment, and the market has become predominantly European, while shrinking in China and the USA.
- **Micromobility services**, such as e-scooter and bike-sharing, remain relevant in urban first- and last-mile transport but are facing growing regulatory barriers and operational inefficiencies. Cities like Paris, Madrid, and Gelsenkirchen have already restricted or banned certain micromobility services, citing safety and congestion concerns. Profitability in this segment remains low due to underutilization and high maintenance costs.
- **Autonomous mobility services**, such as autonomous shuttles or taxis, already piloted in parts of the USA and China, have the potential to fundamentally reshape personal and shared transportation in Europe as well. These services rely heavily on data-driven coordination, high levels of automation, and seamless integration into broader transport systems.

Across all segments, technological innovation is seen as the key to improving cost efficiency, user experience, and scalability. However, many service providers still struggle with high operational costs, limited market uptake, and strong competition for user data. In this context, political support and regulatory frameworks that favor platform-based innovation and data-driven services are becoming increasingly important. The automotive industry's shift toward software and digital ecosystems opens new avenues of economic value creation beyond the vehicle itself. Whether through connected services, mobility platforms, or ongoing digital upgrades, companies that succeed in leveraging these opportunities will not only enhance their competitiveness but also contribute to the broader transformation toward sustainable, user-centric mobility. [1]

3.4 Between close cooperation and competition

OEMs (Original Equipment Manufacturers) and large suppliers must expand their software expertise to remain competitive. Manufacturers are setting up software centers and developing their own operating systems to have the greatest possible control over the hardware and software in the vehicle. To achieve this, OEMs also rely on partnerships with chip manufacturers, e.g. to avoid chip defects, or with software companies to support the development of data platforms.[4] Many suppliers are focusing on software integration and supplying the necessary middleware, for instance. Middleware is software that networks programs from different sources and integrates them into the overall system and is comparable to a control center. [9] In the future, classic OEM-supplier pyramids will no longer work. Close partnership-based cooperation at eye level is required. This is due to increasing technical, economic and legal challenges. [5]

Interaction between players from different levels of the value chain is therefore becoming more intensive. Due to the dynamic competitive situation, companies must decide what role they can and want to play. For OEMs and major suppliers, there is a trend towards digitalization both internally (service creation) and externally (service offering). Complex projects such as centralized vehicle architectures and operating systems also affect company processes. [5] Developing innovations in the fields of digitalization, software or AI is a particular challenge for small and medium-sized companies. The reason for this is the lack of access to data from OEMs or large suppliers, which would be necessary to further develop products. [6]

Keeping up with the fast-moving landscape of software-defined vehicles requires accelerating software development, ensuring efficient deployment, and managing systems at scale. Functional update management over the entire product lifecycle becomes the decisive competitive factor that proprietary single solutions can only deliver with disproportionate resource use. In the automotive industry, the relevance of free and open source software (FOSS) has therefore increased significantly in recent years. FOSS is transforming collaboration in the automotive industry by enabling OEMs and suppliers to work together in open ecosystems to drive innovation and develop common standards. In comparison to proprietary software, which is often subject to a fee and whose source code is considered a company secret, the source code of open source software is freely accessible and can be viewed and edited by third parties. This allows users to modify, use and redistribute the software according to their own needs, based on the respective open source licenses. Open source software is developed decentral and collaboratively by a community, with peer reviews contributing to quality assurance.

FOSS offers numerous advantages for the automotive industry: it is often more cost-effective, as companies

can fall back on software that has already been developed and tested, and more flexible, as adaptations can be made quickly. FOSS is also more durable, as it is not dependent on a single provider. Further advantages are the transparency of the source code, which enables quality and security checks, as well as shorter development cycles using open source code and collaborative development. Close collaboration with technology leaders also contributes to the continuous improvement and innovation of the software. Despite these benefits, companies still face challenges such as license management, compliance and support. However, these can be effectively managed through clear governance structures, the introduction of internal processes to manage risks (such as a FOSS policy) and collaboration with an open source community. [3] While large enterprises typically have dedicated departments that are well-versed in the legal aspects of using open source software (OSS), including licensing and intellectual property (IP) issues, and that review OSS components before integrating them into products, small and medium-sized enterprises (SMEs) often lack these resources. Likewise, SMEs frequently do not have the capacity to actively engage with OSS communities on their own. Many smaller companies also lack a basic understanding of the importance of FOSS for competitiveness and the knowledge of how to adapt business models and processes. [8]

3.5 The role of software for electric vehicles

The importance of electrically powered vehicles is enormous today and will continue to grow. The number of EVs available on the German market is continuously increasing, and companies' current strategies are also oriented towards this. [4] The electrical performance differs depending on the design and degree of electrification. New components of the electric drivetrain (electric motor, battery and power electronics) as well as software in the vehicle change the value of the vehicle. For example, power electronics account for 20% of the added value of an electric powertrain. Overall, there is a shift in the value creation focus from mechanics to electrics/electronics. [4]

To get closer to the previously mentioned application-oriented ecosystem, different megatrends need to be considered in a common picture. Requirements such as smart charging services also play a role here. The more electromobility is accepted by society, the greater the expectation of a seamless and convenient charging experience. This requires high data quality from the necessary infrastructure and the avoidance of company-specific data silos. [5]

4 Projects and Networks to drive the transformation forward

The state agency **e-mobil BW** focuses precisely on the needs of the mentioned common picture. With a large network of science, business, technologies, people and markets, it is shaping the transformation of mobility in Baden-Württemberg. The transition to digital and electrified mobility is being accompanied. To this end, e-mobil BW offers various clusters and networks such as the Network Intelligent Move, the Automotive Software Collaboration BW or the Cluster Electric Mobility South-West and supports research projects relevant to the topic. At the same time, real-world laboratories and test fields offer the opportunity to demonstrate future-proof vehicles. Small and medium-sized enterprises can participate in the development and implementation of such projects. [6] The aim is to position Baden-Württemberg as a leading provider of innovative mobility solutions on the global market.

Cluster Electric Mobility South-West

The Cluster Electric Mobility South-West stands for innovative, electric and digital vehicle technologies to shape a resource-conserving and energy-efficient mobility of the future in Baden-Württemberg. The focus here is on innovative approaches for vehicles and future innovations in powertrain. The cluster includes topics and working groups such as the commercial vehicles working group, the internationalization working group, the electric engines working group, the skilled workers and qualification working group and the circular economy working group.

Automotive Software Collaboration BW

The Automotive Software Collaboration BW - FOSS-LÄND Community is intended to provide companies, with an easy introduction to FOSS and create awareness and promote an open mindset towards FOSS within the automotive industry in Baden-Württemberg. It is not a classic software development community but offers industry relevant basic knowledge of FOSS and low-entry support services such as a consulting voucher and

best practices and functions as the first point of contact for companies in Baden-Württemberg. The initiative focuses on the needs of SMEs and promotes networking and industry-wide collaboration through active community management. The aim is to secure the long-term competitiveness of the automotive cluster in Baden-Württemberg. Companies should be enabled to recognize the potential of FOSS for their business models, find suitable entry points for a deeper examination, deal with FOSS in a legally compliant manner and participate in the relevant FOSS Communities (e.g. Eclipse SDV). In addition, the community should promote the use of synergies and open standards in the region to make the most of the opportunities offered by FOSS in the automotive industry. [11]

Network Intelligent Move

The Network Intelligent Move acts as a hub for the exchange and analysis of opportunities and challenges in the field of digital mobility. It brings together experts from science, business and administration in Baden-Württemberg to jointly shape the future of mobility. The network promotes cooperation and knowledge transfer between the participants through a variety of event formats such as workshops and working groups. The aim is to make optimum use of existing expertise and synergies in the field of digitalization and to develop innovative solutions.

Intelligent Move deals with **four fields of action** such as digital infrastructure, digital vehicles and digital services, all of which are part of an overarching digital ecosystem. These areas cover a range of topics. In the **field of digital vehicles**, the topics include future vehicle architectures, driver assistance systems, autonomous driving, and the application of chips in vehicles. The interface with infrastructure is also highly significant, involving communication standards such as Wi-Fi or mobile networks, vehicle localization, and Car-to-X communication. In the **field of digital infrastructure**, topics include digital traffic signs, intelligent traffic management systems, traffic light signals, roadside units, and innovative projects related to the placement of sensors in infrastructure. The **digital services field** covers connected car services as well as digital services that enable efficient multimodal travel chains. Digital services that make public transportation more demand-oriented, secure, and efficient also play a major role. The comprehensive **digital ecosystem** brings all these areas together, addressing issues related to AI in mobility and vehicles, cybersecurity, data in mobility, and much more.

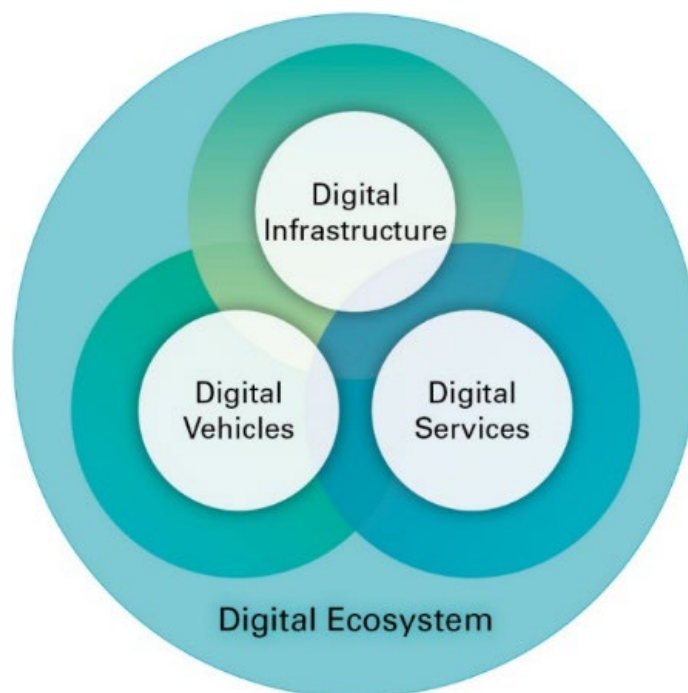


Figure 3: Network Intelligent Move – Fields of Action (c) e-mobil BW / markentrieb

In these fields of action, project ideas are developed, roadmaps drawn up and research needs identified to drive forward the digital transformation of mobility in Baden-Württemberg.

In addition to these topics, research projects are accompanied. As an agency, the activities take place before, during and after projects. While projects are planned for the long term, the network allows them to act agilely within the mentioned fields of action.

A research project initiated by e-mobil BW and publicly funded by the Federal Ministry of Economics and Climate Protection (BMWK) is **SofDCar**. Here, the project partners are researching the challenges of future E/E & Software architecture in vehicles, which is understood as part of a networked vehicle and system environment. Challenges of technological change and secure software operation are being addressed. The aim is to research functional enhancements in software and ways to ensure the digital sustainability of future vehicle concepts. The project was completed in December 2024. [12]

Another project supported by e-mobil BW as an associated partner and funded by the Federal Ministry for Digital and Transport (BMDV) is **SIMON** (Safe Mobility and Navigation through Predictive Risk Management using Swarm Intelligence and V2X Communication). The research project aims to enhance the safety and efficiency of autonomous and multimodal mobility through AI-based risk management and V2X communication. A key component is a digital twin of the traffic context, which is based on real-time data and analyzes potential risks. The “trafficpilot” app provides road users, whether in a car, on a bicycle, or on foot, with intuitive recommendations for safe and eco-friendly mobility, without the need to predefine a specific route. The project will be completed in June 2027.

As a state agency, it is their role to methodically communicate the project results via knowledge transfer. This approach allows them to reach a broad target group, which is relevant for the industry. Network Intelligent Move is a basis for the dissemination of results and expertise. This is precisely the starting point for setting up a working group as a follow-up activity within the network. Here it is important to respond to the needs of the various interest groups, as the network consists of partners with different areas of expertise. **The partners in the network** include manufacturers, suppliers, and technology companies from the automotive and mobility sector, infrastructure providers and operators, mobility service providers and public transport, research institutions and universities, as well as the public sector and municipalities.

5 Conclusion and Outlook

The transformation of the automotive industry in Baden-Württemberg is progressing rapidly, driven by the electrification of drivetrains, increasing automation, and most notably, the growing importance of software. This shift marks a fundamental turning point: the rise of the software-defined vehicle (SDV) is emblematic of the broader evolution from a hardware-centric industry to a software-driven mobility ecosystem. In this new environment, the car is no longer defined solely by mechanical performance but by its digital capabilities, connectivity, and integration into a wider system of services and platforms.

The relevance of software-defined vehicles should not be underestimated. They embody a structural change that goes beyond technological innovation and includes the development of new business models, value chains, and a redefinition of stakeholder roles. OEMs, suppliers, and emerging tech players must therefore adapt their strategies and invest in new competencies to succeed in this highly dynamic and competitive landscape.

As discussed in this paper, Baden-Württemberg, with its strong industrial base, high innovation capacity, and dense network of actors, has a great opportunity to actively shape this transformation. However, to realize the full potential of software-driven value creation, it is essential to address several key challenges. One of the most pressing is the balancing act between collaboration and competition.

In a global industry where innovation cycles are accelerating, joint efforts must not hinder individual success. Instead, they must enable it. Comprehensive standards and open-source software are promising approaches to meet this challenge. They allow for cost savings, foster shared technological advancement, and support the widespread adoption of interoperable solutions. Such approaches are particularly important in a fragmented market where seamless integration and rapid scalability are success factors. [4]

Looking ahead, the automotive and mobility ecosystem must become more open, more collaborative, and more digital. At the same time, political frameworks and innovation policies must support these efforts through infrastructure investments, digital education, and regulatory clarity. The aim is to meet global challenges and thus strengthen the competitiveness of Baden-Württemberg as a traditional automotive location in the long term.

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