

Cover Autos

The Battle for the Future of the Car Is Under Way. Investors Won't Have to Pick a Side.

Auto makers are pressing ahead with "software-defined vehicles." Here are the suppliers helping to make it happen.

By Eric J. Savitz [Follow](#)
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The \$4 trillion automotive industry is going through three big transformational changes at once. Two of those—the rise of electric vehicles and the gradual emergence of autonomous driving—have attracted most of the attention. But the third one could be more powerful still: Cars are becoming computers on wheels.

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Cars in the Fast Lane

Auto revenue is forecast to more than double over the next two decades, but most of the growth is coming from new digitally enabled services.

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“There are now more lines of code in the average car than there are in a [Boeing 747](#),” says Dipti Vachani, senior vice president of automotive and Internet of Things for Arm Holdings, the [SoftBank Group](#)–owned chip–design house.

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Sure enough, after years of welcoming [Apple](#) and [Google](#) into their cockpits, car makers are now pushing back. Last month, [General Motors \(GM\)](#) said that its future EVs, starting with the 2024 Chevy Blazer EV, would no longer support Apple’s CarPlay or [Google’s Android-based phones](#). GM will instead offer its own system based on an embedded design of Android Automotive, which will be preinstalled in the car, with custom versions of [Google Maps](#), [Spotify](#), and other applications.

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Mercedes, meanwhile, expects to generate billions of dollars in revenue by 2025 from MB.Connect, the German auto maker’s mapping, navigation, and vehicle-monitoring platform, and MB.Drive, the company’s autonomous-driving platform. Other auto makers are following a similar path.