



Software-Defined Vehicle Support and Coordination Project

D5.2 SDV Ecosystem Progress Report

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October 2025**

Deliverable		D5.2 SDV Ecosystem Progress Report
Work Package(s)		WP5 – Ecosystem Building & Dissemination
Dissemination Level		Public
Due Date		30-09-2025
Actual Submission Date		02-10-2025
WP Leader		VDI/VDE-IT
Deliverable Leader		VDI/VDE-IT
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Document History			
Revision No.	Date of the review	Name of the reviewer	Status of the document (<i>in progress, ready for review, released</i>)
V0.1	19-09-2025	Gabriele Keraite (METIS) Jurgita Siksnienė (METIS)	Revision of the first draft
V1.0	01-10-2025	Benjamin Wilsch (VDI/VDE-IT)	Final version

The project has been accepted for funding within the Chips Joint Undertaking (CHIPS JU), a public-private partnership in collaboration with the Horizon Europe (HORIZON) Framework Programme under Grant Agreement No. 101139749

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Definitions

Table 1: Definitions, Acronyms, Abbreviations

Abbreviations	Meaning
ADAS	Advanced Driver Assistance Systems
API	Application Programming Interface
BB	Building Block
CCAM	Co-programmed Partnership for Cooperative, Connected and Automated Mobility
Chips JU	Chips Joint Undertaking
EC	European Commission
FOSDEM	Free and Open source Software Developers' European Meeting
HPC	High-Performance Computing
HW	Hardware
OCA	Open Source for Automotive
OCX	Open Community Experience
OEM	Original Equipment Manufacturer
PFA	Plateforme Automobile [French automotive association]
OS	Operating System
RISC-V	Open standard Instruction Set Architecture (ISA) enabling a new era of processor innovation through open collaboration
R&D	Research & Development
SDV/SDVoF	Software-Defined Vehicle (of the Future)
SIA CESA	Société des Ingénieurs de l'Automobile [French Society of Automotive Engineers] Conférence sur les Systèmes Embarqués dans l'Automobile [Conference on Embedded Systems in the Automobile]
SW	Software
VDA	Verband der Automobilindustrie [German Association of the Automotive Industry]
XEN	Open-source hypervisor (virtual machine monitor)
2Zero	Towards zero emission road transport: a co-programmed Partnership funded under Horizon Europe

1 Executive Summary

The FEDERATE project is a Coordination and Support Action (CSA), which is committed to enhancing the global competitiveness of the European mobility and semiconductor industries in delivering the Software-Defined Vehicle of the Future (SDVoF). The project aims to bring together all relevant stakeholders to accelerate the development of an SDVoF Ecosystem, to foster a vibrant European community, and to orchestrate the SDVoF RDI activities over a course of 36 months. The consortium, represented by 29 partners (project members) from seven EU countries, reflects the entire automotive value chain. It consists of major OEMs, automotive tiers, semiconductor companies, relevant industry associations, and scientific research institutes.

This deliverable is part of Tasks T5.1 (Create Open SDV Ecosystem Forum) and T5.2 (Organize Community Solicitation Workshops) of the FEDERATE project, which commenced on 1 October 2023 and is scheduled to conclude on 30 September 2026. The goal of the task within the FEDERATE project is to establish an open SDVoF Ecosystem Forum to function as a knowledge exchange platform for relevant stakeholders in Europe. The task is led by VDI/VDE-IT.

FEDERATE intends to cultivate, reinforce, and activate a European SDVoF stakeholder network – called SDVoF Ecosystem Forum – while expanding its reach by connecting with broader international SDV communities. A crucial preliminary step has been the stakeholder analysis in Deliverable D5.1 (published in month 12 of the project). The FEDERATE team has analysed EU-funded research projects, nationally funded projects, as well as relevant associations to clarify the target groups and their goals. Based on this status quo analysis, the D5.2 SDV Ecosystem Progress Report shows the results the project has achieved up to month 24.

In its second year, the FEDERATE project achieved significant growth in the SDVoF ecosystem by expanding communication channels, attracting new stakeholders, and strengthening collaboration across the network. Activities included showcasing project results through events, webinars, and newsletters, as well as fostering exchanges between automotive, open-source, and technical communities. For the third and final year, the focus will be on further expanding the ecosystem's reach and topical coverage, enhancing alignment opportunities, and preparing the ecosystem for long-term self-sustainability beyond the FEDERATE project.

2 Introduction

2.1 Purpose of the Document

The Deliverable 5.2 aims to analyse the progress of the SDVoF¹ Ecosystem and to identify key stakeholders acting as multipliers and connectors on the broader SDVoF community after 24 months of the FEDERATE CSA. The document includes reports on the activities of the project as well as the SDVoF initiative, while also providing a basis for the planning and optimisation of future activities for the third and last year of the project implementation period. Strategic recommendations will also take into account the progress data of the SDVoF ecosystem.

The FEDERATE project extends the existing stakeholder network, especially towards currently underrepresented stakeholder groups. Amongst those, linking the open-source software community to the automotive industry is a primary objective, as the resulting collaborations can form the basis for achieving the SDVoF vision. Furthermore, activities will be set in place, facilitating the exchange between the stakeholders in order to create a vibrant and self-sustaining ecosystem. This addresses research and development priorities as well as implementation projects (proof of concept). Views and urgent needs of the wider community will be taken into consideration. Within this, a stakeholder map will be created and updated during the project in order to identify the key players of the SDVoF initiative as well as technical blind spots that still need to be covered.

2.2 Intended Audience

This is a public document. For the project consortium, this document serves as a guide for the FEDERATE stakeholder engagement strategy, promoting related procedures and tools. Furthermore, it provides an overview of the key players in the SDVoF ecosystem and indicates underrepresented stakeholder groups. The stakeholder engagement strategy is especially relevant for the following groups:

- FEDERATE consortium
- SDVoF initiative
- European Commission
- Companies within the automotive industry
- Open-source for automotive community
- Regulation and standardisation bodies
- The wider SDVoF community

¹ The term SDV was expanded to SDVoF during the first year of the project, in order to address all relevant stakeholders and to account for activities across the SW/HW interface.

2.3 Reasons for the Need of a Vibrant SDVoF Ecosystem

Since the exploitation of synergies and the cross-industry collaboration are key elements of the SDVoF initiative in its objective of ensuring European competitiveness, the development of an effective, dynamic, and well-networked ecosystem in which the automotive and open-source industry, as well as other relevant stakeholders and authorities, are “embedded” is paramount. In Europe, there are already many players with the suitable competencies needed for the establishment of the SDVoF initiative. Notable examples include the strong research landscape and the competencies of European automotive suppliers and manufacturers, as well as the open-source community. However, there are also obvious weaknesses along the value chain in Europe, especially regarding disruptive and purely IT-driven solutions. This document aims to present the progress made compared to the status quo at the initial project phase, as described in deliverable D5.1 Stakeholder Engagement Strategy.

Why a Vibrant SDVoF Ecosystem Is Essential

The transition to competitive SDV in Europe will succeed only if fragmented efforts become a coordinated, open ecosystem. The mission of the SDVoF initiative is to turn today’s silos—OEMs, Tier-n suppliers, tool vendors, open-source projects, standardisation bodies, and authorities—into a working network that co-creates reusable building blocks (BBs), shared interfaces, and reference implementations that can be adopted across programs and brands.

Europe already has strong assets: a deep research base, world-class suppliers, and a mature open-source community. The gaps are equally clear: duplicated engineering, proprietary interfaces, toolchain incompatibilities, talent scarcity, and slower uptake of IT-native practices (DevOps, API-first, inner-source). Left unaddressed, these gaps raise costs, delay time-to-integration, and weaken Europe’s competitiveness versus software-centric rivals.

SDVoF addresses this by:

1. Coordinating cross-project roadmaps to avoid duplication and align BB priorities;
2. Industrialising open assets (code, specs, test suites) with governance and quality gates that meet safety (ISO 26262), cybersecurity (UNECE R155), and software update (UNECE R156) expectations;
3. Lowering entry barriers for SMEs and new talent via documented interfaces, permissive licensing choices, and onboarding playbooks;
4. Driving adoption through pilots, integration sprints, and an open forum.

This report evidences progress against the baseline of the Stakeholder Engagement Strategy (D5.1) and sets measurable targets for year-3 adoption and sustainability beyond the project.

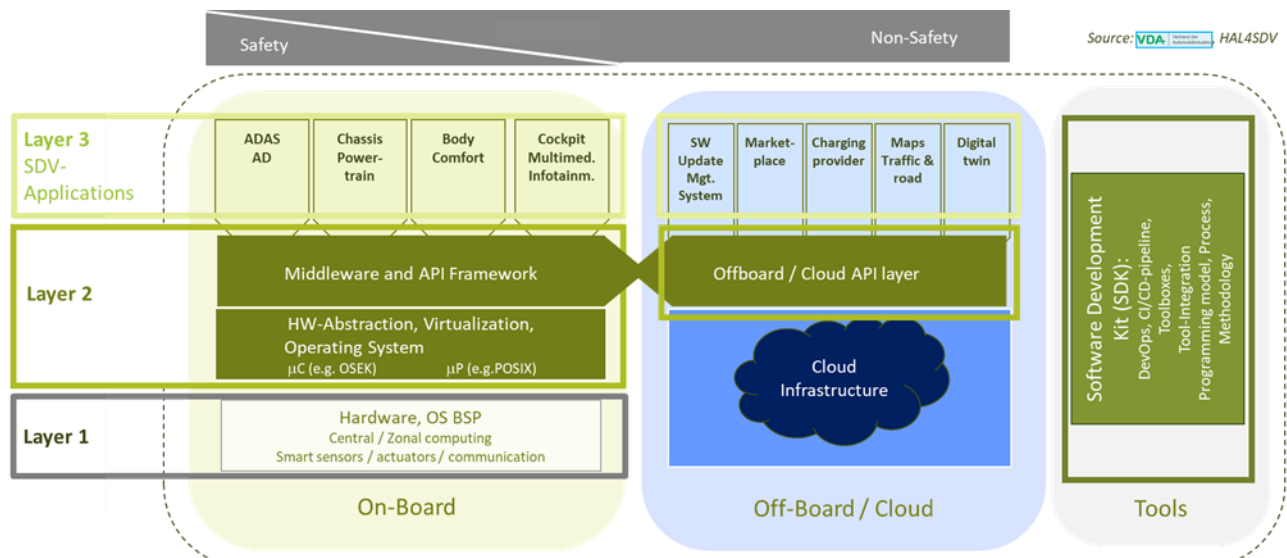
3 SDVoF Ecosystem Overview

3.1 SDVoF Ecosystem Structure

In the initial phase of the project, a stakeholder map has been created. Hereby, the term “Ecosystem” encompasses actors and structures that emerge from respective relationships, which involve SDV-related activities. In this sense, the “Ecosystem” can be represented as a network between the key actors.

Connections between stakeholders can result from current, completed, or potential/planned joint activities in relation to a common goal in the context of the SDV community. The activities take place within common research and innovation as well as coordination activities (EU-funded projects) and cooperation for the pursuit of common strategic interests (members of strategic associations). These structures consequently provide the basis for knowledge transfer centred around these joint activities. Simultaneously, these structures include connections that can be leveraged for potential value creation partnerships, and an overview of them enables the identification of opportunities and initial approaches for future value creation. In this respect, a holistic, structural view of the SDVoF Ecosystem allows for an examination of the connections between the actors at various levels as well as an investigation of the contributions to and cooperation toward knowledge generation and strategic influence.

The initiative has agreed on a three-layer structure for SDVoF hardware/software (HW/SW) stacks as depicted in Figure 1. The SDV structure abstracts the HW resources (layer 1) as processor resources, sensors, actuators, data coming from various communication media, as well as data in the cloud (e.g., regarding traffic status). Vehicle drivers and passengers use the services built on these resources for the application software. This shall increase the development efficiency and agility for user-relevant software applications.



The SDVoF HW/SW-stack consists of the following layers:

- **Layer 1 (SDV-Hardware):** This layer includes all hardware components, such as automotive high-performance compute (HPC) platforms and domain controllers, and the SW abstraction of resources of the HPCs and domain controllers required for the largely AI-based software, serving several automotive domains with applications satisfying requirements with respect to non-safety critical functions, safety critical functions, security, energy efficiency, etc.
- **Layer 2 (SDV-middleware & hardware abstraction & OS):** This software-based Layer 2 is the main focus of the SDVoF initiative. It consists of (mainly open-source and mostly non-differentiating) software building blocks, which connect the hardware layer with the applications layer to allow separated hardware and software development cycles necessary for SDVoF. This layer also ensures the safe execution of the applications in layer 3. It consists of software building blocks, which can also be used in existing OEM-specific SW stacks. As many applications have on-board and off-board (cloud) elements, a service-oriented interface layer is required in the cloud.
 Layer 2 consists of two sub-layers: 2a) HW abstraction, virtualization, and operating system (OS), and 2b) SDV middleware and Application Programming Interface (API) framework.
 Layer 2 may use different OS in different SDV domains, such as infotainment, Advanced Driver Assistance Systems (ADAS), automated driving, chassis/powertrain control, body-comfort, etc., but the interfaces are the same.
- **Layer 3 (SDV-Applications):** This layer contains the differentiating parts with applications in automotive domains such as infotainment, automated driving, advanced driver assistance functions, chassis and powertrain control, cockpit user interfaces, e-charging, routing, (body-)comfort functions, etc. Many of the applications have parts onboard of the vehicle and other parts in the cloud.

3.2 Main Actors in the SDVoF Ecosystem Structure

The SDVoF initiative provides the vital link between the hardware platform, more specifically the RISC-V HPC platform, and the application layer, where differentiating OEM- or Tier-specific applications and functionalities come into play. The interfaces between the three layers are thus those of HW/SW abstraction and a functional abstraction, as illustrated in Figure 2. Besides connecting relevant actors across the fields of SDV and open-source solutions, the initiative must therefore also establish and maintain links to the application and hardware layers, in order to ensure that ultimately European competitiveness and market readiness in the SDV domain are maximised. For this purpose, the activities within the first two years of the FEDERATE project were designed to establish permanent links to relevant organisations and initiatives across all three layers. The reach and scope of individual stakeholders and multipliers were considered in prioritising the activities. With respect to the application layer, a close alignment and collaboration was established the 2Zero and CCAM partnerships, while alignment with the RISC-V initiative is ensured primarily through the projects described below and regular exchange and joint presentations and publications. As an example, as this report is being finalized, the presentation of the RIGOLETTO project (RISC-V initiative) in a FEDERATE webinar is being prepared for October 2025 and in May 2025 FEDERATE, HAL4SDV and both TWIN-LOOP and CODE4SDV (2Zero partnership) held a joint session at the European Nanoelectronics Applications, Design & Technology Conference (ADTC). At the EPoSS Annual Forum 2025 these projects were presented together, further underlining the close collaboration and use of synergies. A common publication spanning input across all the projects at the Transport Research Arena 2026 (TRA) is also being prepared.

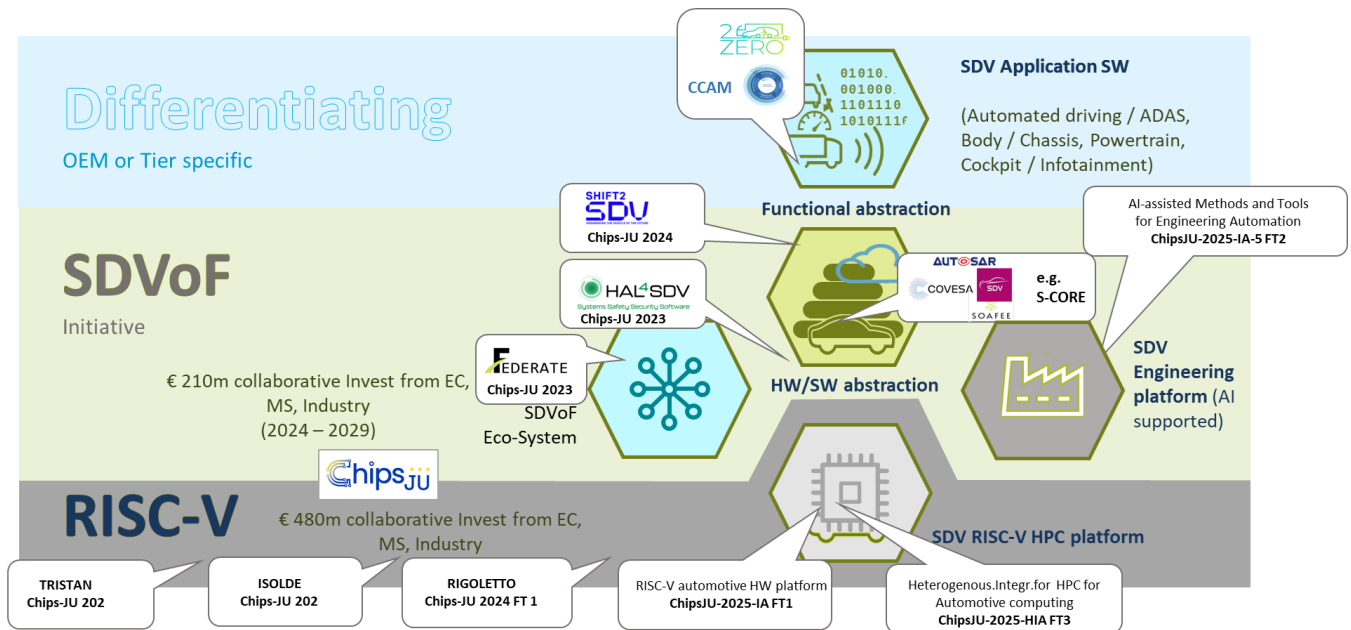


Figure 2: Elements of the SDVoF initiative and link to RISC-V initiative as well as the application layer.

Relevant projects and initiatives, which act as an important part of the leading actors in the SDV Ecosystem, have been summarized below. For a more detailed and technical explanation of the collaboration modes, please refer to D4.5: Strategic Roadmap (especially Chapter 7). Examples for the exploitation of cross-project synergies are the

- joint session on SDV by FEDERATE, HAL4SDV/Shift2SDV, TWIN-LOOP and CODE4EV at the European Nanoelectronics Applications, Design & Technology Conference (ADTC) in Grenoble, France.
- submission, in September 2025, of a joint paper to the Transport Research Arena (TRA) 2026 titled “An overview of European research initiatives for Software-Defined Vehicles” by the projects FEDERATE, HAL4SDV, RIGOLETTO, TWIN-LOOP and CODE4EV, .

SDVoF projects:

I. Chips JU-funded projects

- **HAL4SDV** (Hardware Abstraction Layer for a European Software Defined Vehicle approach; Chips JU, April 2024 to March 2027, www.hal4sdv.eu, RIA) aims to advance European solutions in software-defined next-generation vehicles. By focusing on unifying software interfaces and development methodologies, HAL4SDV will enable software configuration that abstracts from vehicle hardware, paving the way for an SDV approach for both safety-critical and non-safety-critical applications in future vehicles.
- **Shift2SDV** (Software development framework and hardware independent microservice-oriented middleware architecture for the stepwise migration to the SDVoF; Chips JU, July 2025 to June 2028, IA) seeks to define, coordinate, and develop a common language-independent middleware framework. It focuses on the topics of SDV middleware, API, and a flexible micro-services-based architecture.

- **RIGOLETTO** (High Performance RISC-V Automotive Processors supporting the vehicle of the future, Chips JU, July 2025 to June 2028, IA) has the main objective of paving the way for further exploiting the full potential of open-source RISC-V ISA (instruction set architecture) as a key technology to address the demands in the context of future Software Defined Vehicles (SDV) with software running on more powerful in-car computers and the need for adequate real-time processor architectures.
- **TRISTAN** (Together for RISC-V Technology and Applications, December 2022 to November 2025, IA) aims to expand and develop RISC-V architecture in Europe to compete with existing commercial alternatives. This open specification eliminates the need to learn and create unique ecosystems for each processor architecture, increasing productivity, security, and transparency. TRISTAN's approach will be holistic, covering electronic design automation tools and the full software stack.
- **ISOLDE** (High Performance, Safe, Secure, Open-Source Leveraged RISC-V Domain-Specific Ecosystems, May 2023 to April 2026, IA) aims to expedite the digitalisation of European economic and societal sectors, enabling a quicker and more efficient adoption of green solutions. The project focuses on developing high-performance RISC-V processing systems and platforms with open-source, industrial-grade support to enhance quality and accessibility. Ultimately, the project will promote these technologies in upcoming industry innovations.

II. 2Zero partnership

- **CODE4EV** (Collaborative Development Framework for Electric SDV; HORIZON Europe/2Zero partnership, January 2025 to December 2027, www.code4ev.eu, RIA) aims to accelerate the development of electric software-defined vehicles (SDVs) by establishing a collaborative development framework. This framework will support the design, production and operational phases of electric vehicles (EVs) by demonstrating its application through selected Use Cases relevant to emerging and future SDV architectures.
- **TWIN-LOOP** (TwinOps and vehicle specific Digital Twin for Software Defined EVs; HORIZON Europe/2Zero partnership, January 2025 to December 2027, www.twin-loop.eu, RIA) will develop an Open Framework for TwinOps for EVs along with a suite of digital tools aimed at continuously improving Energy Consumption, Hardware Costs, Driver Experience and Vehicle Resiliency across the four stages of the vehicle lifecycle. The project will implement the Open Framework, integrate with EV specific tools and assess their effectiveness in realistic conditions across three different use cases, identified for their relevance to the topic.

III. CCAM partnership

- **EEA4CCAM** (Electrical and Electronic Architecture for CCAM; HORIZON Europe/CCAM partnership; RIA) aims to empower the safe and cyber secure deployment and operation of Connected, Cooperative and Automated Mobility (CCAM) applications across widespread operating conditions through a novel centralized, reliable and upgradable in-vehicle electronic control architecture (ECA).
- **UP2DATE4SDV** (Enabling safe & secure modular UPdates, UPgrades and DynAmic Task reallocation and Execution for SDV, HORIZON Europe/CCAM partnership, July 2025 to June 2028, RIA) works toward the creation and integration of a middleware solution aligned with current automotive open

source standards, which allows complete abstraction not only of the software running in the vehicle, but also of the installed hardware. As a result, not only can the software be continuously updated over the air over the lifetime of the vehicle and thus kept safe, secure, and up to date, but hardware components can also be easily replaced or supplemented to meet future requirements.

IV. ECLIPSE SDV

The Eclipse Software Defined Vehicle (SDV) is a Working Group within the Eclipse Foundation that facilitates open-source development of automotive software. The aim is to provide a forum for individuals and organizations to build and promote open-source solutions for the worldwide automotive industry markets. Using a “code first” approach, SDV-related projects focus on building the industry’s first open-source software stacks and associated tooling for the core functionality of a new class of automobile.

- **S-CORE** (Eclipse Safe Open Vehicle Core) develops an open-source core stack for Software Defined Vehicles (SDVs), specifically targeting embedded high-performance Electronic Control Units (ECUs). It targets the non-differentiating core of a software stack running on HPC ECUs of a software-defined vehicle. Consequently, this project’s scope are the “inner layers” of such a stack between a hardware abstraction as its ‘lower bound’, ‘southbound interface’ and a platform API towards vehicle function applications as its ‘upper bound’, ‘northbound interface’.

V. National/co-funded projects

- **SofDCar** (Germany, funded by Federal Ministry for Economic Affairs and Energy and the European Union, August 2021 to July 2024) focuses research on the challenges of future E/E & SW architecture in vehicles. Each vehicle is seen as one piece in a network of all vehicles and the infrastructure. Its integration will be enabled via “data loops” and new-type “digital twins”, thereby paving the path to digital sustainability (of today’s and tomorrow’s vehicle generations) and enabling efficient data structures and innovative use cases throughout the whole vehicle lifetime (Re-Deployment). The SofDCar Alliance continues the project mission.

Automotive middleware initiatives and projects

- **AUTOSAR**² (AUTomotive Open System ARchitecture): AUTOSAR is a global partnership of leading companies in the automotive and software industry to develop and establish the standardized software framework and open E/E system architecture for intelligent mobility.
- **COVESA**³: COVESA is an open, collaborative and impactful technology alliance; accelerating the full potential of connected vehicles. The workgroups in COVESA focus on data models as the Vehicle Signal Specification (VSS), common vehicle interfaces, electric charging as well as other topics.

² AUTOSAR: <https://www.autosar.org>

³ COVESA: <https://covesa.global/>

- **SOAFEE⁴**: SOAFEE is an industry-led collaboration between companies across the automotive and technology sectors working together to build open-source architecture for software-defined vehicles using cloud-native architectures that accommodate multiple hardware configurations.
- **Catena-X⁵**: CATENA-X is an open and interoperable data ecosystem and an open-source community. Its goals are: Give transparency and provide an environment for the creation, operation, and collaborative use of data chains along the automotive value chain.

Automotive open-source software stakeholders

Eclipse SDV⁶: Eclipse Foundation is providing an open technology platform for the software-defined vehicle of the future; accelerating innovation of automotive software stacks through a vibrant open-source community.

Automotive industry associations and initiatives

ANFIA⁷: It represents the interests of its associate members (automotive component manufacturers, car designers and engineering companies, motor vehicle companies) and ensures effective communication between the Italian motor vehicle industries on the one hand, and the Public Administration and Italian political bodies on the other, regarding all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector.

PFA⁸: The Automotive Platform (PFA) brings together the automotive industry in France. It defines and implements, on behalf of all partners (manufacturers, equipment manufacturers, subcontractors, and mobility players), the sector's strategy in terms of innovation, competitiveness, employment and skills. It carries the voice and expression of the common positions of the sector.

VDA⁹: VDA is the association of the automotive industry in Germany. It works on framework conditions so that its member companies, from start-ups to global corporations, can realize their visions of climate neutrality by 2050 and successfully bring their offerings to market.

EUCAR¹⁰: EUCAR, the European Council for Automotive R&D of the major European passenger car and commercial vehicle manufacturers, is the R&I unit of the European Automobile Manufacturers' Association (ACEA¹¹). EUCAR facilitates and coordinates pre-competitive research and development projects; its members participate in a wide range of collaborative European R&D programs.

CLEPA¹²: CLEPA represents over 3,000 European companies supplying state-of-the-art components and innovative technology for safe, smart and sustainable mobility.

⁴ Soafee: <https://www.soafee.io/>

⁵ Catena-X: <https://catena-x.net/en/>

⁶ Software Defined Vehicle | The Eclipse Foundation: <https://sdv.eclipse.org/>

⁷ ANFIA: <https://www.anfia.it/en/>

⁸ PFA - Automotive Platform: <https://pfa-auto.fr/>

⁹ Verband der Automobilindustrie e. V. | VDA: <https://www.vda.de/de>

¹⁰ EUCAR - European Council for Automotive R&D: <https://www.eucar.be/>

¹¹ ACEA - European Automobile Manufacturers' Association: <https://www.acea.auto/>

¹² CLEPA – European Association of Automotive Suppliers: <https://clepa.eu/>

CCAM¹³: The goal of the CCAM (Connected and Collaborative Automotive Mobility) partnership is to create a more user-centered and inclusive mobility system, increasing road safety while reducing congestion and environmental footprint.

2Zero¹⁴: The 2Zero partnership will implement an integrated system approach covering Battery Electric Vehicles (BEV) and Fuel Cell Electric Vehicles (FCEV). With the support of five Technology Platforms (ERTRAC, EPoSS, ETIP-SNET, ALICE, and Batteries Europe), it will continue investigating new vehicle technologies and will extend its scope to cover the integration of the zero tailpipe emission vehicles in their eco-system, contributing to boost the EU competitiveness and technological leadership.

ECAVA: The European Connected and Autonomous Vehicle Alliance strives to regain a leadership position for Europe in Software-enabled, AI powered, Connected and Autonomous vehicles. This includes the provision of industrial capacities for the SW and Chips needed for these vehicles.

3.3 Participation Levels in the SDVoF Ecosystem

Participation in the SDVoF Ecosystem is open to everyone and possible in one of the following three tiers, which are associated with different levels of contribution and involvement:

- FEDERATE members (see consortium)
- FEDERATE associated members:

Table 2: List of associated project members

Accenture	FEV	Volvo Truck	RL
ANFIA	LTU	Hyundai Europe	TNO
ASTAZERO	PFA	SAE Europe	PMG
Autosar	VDA	TU Berlin	TATA
CEA List	VITESCO	TWT	ELAPHE
COVESA	DAIMLERTRUCK	KTH	VICONE
EUCAR	STELLANTIS	CERTH	EARPA

Associated Membership

M6: 22 applications

M12: 22 associated members

M18: The project counted 28 associated members by the end of M18

Interest in Associated Membership has been expressed by various SDVoF stakeholders throughout the course of the project, once again underlining the high relevance and good visibility of the FEDERATE project. As a result, the number of Associated Members has grown steadily, up to 28 organisations (31 including affiliates), spanning automotive OEMs, tier suppliers, research institutions, software companies, industry associations, and consultancies. These partners make active contributions to project outputs, facilitating a broad validation of results and expanding the reach of project activities.

¹³ CCAM – Connected Collaborative Automotive Mobility: <https://www.ccam.eu/>

¹⁴ 2Zero – Towards zero emission road transport <https://www.2zeroemission.eu/>

4. SDVoF Ecosystem Progress

4.1 Open Ecosystem Forum

One of the key challenges of the SDVoF initiative is to harmonize the different development processes for new hardware components (strict V-process) and new software applications (agile process). In order to achieve high efficiency and stability an excellent synchronization and orchestration between the development stakeholders is necessary.

All relevant Research and Innovation Actions for new hardware components (SDV hardware ecosystem) as well as relevant Research and Innovation Actions for software components (SDV software ecosystem and SDV software applications) are summarized under the European SDVoF initiative. This is accompanied by building a vibrant European SDV community, which is supported by activities planned within the FEDERATE project such as the open SDVoF Ecosystem Forum. The open SDVoF Ecosystem Forum is supposed to function as a knowledge exchange platform for relevant stakeholders in Europe. Through this forum, users are able to consolidate their knowledge, share lessons learned as well as lead discussions to foster industry collaboration in the realms of SDV technology. Interested parties can register to the forum throughout the duration of the project via the FEDERATE website (<https://federate-sdv.eu/>) and can join workshops, conferences and networking events at any time. The platform provides a level playing field to host (technical) workshops and cross-project collaboration on non-differentiating open-source software. The forum aims to leverage other SDV related events such as EclipseCon, Eclipse SDV WG Community Days, FOSDEM (Free and Open source Software Developers' European Meeting), the Linux Foundation Open Source Summit and many more.

With the purpose of understanding the needs and pre-competitive strategies and to strengthen the commitment of decision makers in the top-level management of OEMs and Tiers to actively contribute to the SDVoF Initiative, it is necessary to get in contact with key persons within the stakeholder companies and organizations. For this purpose, Dirk Walliser, former Senior Vice President (SVP) R&D at ZF Friedrichshafen AG, was engaged as SDV ambassador for the project and ensured contacts and alignment with divisional managers of organizations with significant impact on the SDVoF ecosystem. He further supported the derivation of a common understanding and provided the link between the management levels and the SDV Sherpa governance group, thus ensuring the development of a common pre-competitive strategy in alignment with the SDV stakeholders and the European Commission.

The SDV Sherpa governance group oversees and governs the work of the coordination and support action FEDERATE and the funded projects initiated by the SDVoF initiative. In order to fulfil its tasks in coordinating and supporting the SDVoF initiative, FEDERATE further supports the SDV Sherpa governance group by organizing meetings, drawing up meeting minutes and executing back-office tasks. Further details on the meetings and results of the SDV Sherpa governance group are provided in D4.5 (Strategic Roadmap) as well as the Technical Report for Year 2 of the project.

To determine which tools and measures to use for the open SDVoF Ecosystem Forum, the FEDERATE project identifies the needs of the community as a first step. Consequently, appropriate tools and measures for an efficient SDVoF Ecosystem forum are applied. The identification of the needs is conducted within technical workshops, webinars, and especially by the annual SDV Conferences organized by FEDERATE. The further development of the open SDVoF Ecosystem Forum will be continued, utilizing the best-matching methodology

based on the identified needs of the community.

4.2 Ecosystem Newsletter

Regular newsletters are sent out to subscribers, providing updates, insights, and upcoming events related to FEDERATE and the SDVoF initiative. This helps keep the community engaged and informed. The newsletter subscription form is available on the project website. The newsletters are created based on the contribution of all partners and distributed by Metis Baltic to the list of subscribers. The newsletters are sent out on a quarterly basis. The first project newsletter was created and shared in M4. It was sent out to 107 registered subscribers of the FEDERATE SDVoF Ecosystem Forum. The number of registered subscribers is constantly growing (see Figure 3). The FEDERATE SDVoF Ecosystem has reached the number of 346 registered subscribers by September 2025. This development shows, that FEDERATE is focusing interesting SDV-related topics and addresses a broad audience. Considering the recently started Chips-JU projects: Shift2SDV and HAL4SDV, FEDERATE will take up topics from related stakeholder groups and expand the SDVoF Ecosystem Forum. More solicitation workshops will be organized and relevant results will be summarized in the regular newsletters in the third project reporting period.

Table 3: Overview of project newsletters and recipient statistics.

Issue	Publication date	Recipients	Content
1	January 2024	107	• Announced the launch of FEDERATE • Defined the vision and mission: to establish an open European SDV (Software-Defined Vehicle) ecosystem, bringing together stakeholders across mobility, semiconductor, open-source, and public sectors • Emphasized key deliverables like the vision document and glossary, as well as early plans for SDV conferences in collaboration with the Eclipse Foundation
2	April 2024	163	• Presented the SDVoF (Software-Defined Vehicle of the Future) Initiative: its vision, roadmap, and alignment with SDV community efforts • Explored the interrelation of the SDVoF initiative with broader areas like CCAM (Connected, Cooperative, Automated Mobility) • Included invitations to “Save the Date” for two upcoming events related to the SDVoF ecosystem
3	July 2024	212	• Detailed the governance structure of the SDVoF initiative, including the Sherpa Governance Group and its role in steering the project. • Introduced the new FEDERATE GitHub repository, including its structure, glossary, and collaborative tools for BBs. • Shared updates on FEDERATE’s participation in key SDV-related events, encouraging readers to register for upcoming ones
4	October 2024	280	• Recapped highlights from the FEDERATE Networking Event held on 23 September 2024 in Vienna. • Emphasized the building blocks essential for future SDVs and gave

			insights from “The Autonomous Main Event 2024”. • Introduced monthly TechTalks for the SDVoF community and invited participation in the upcoming first online webinar (“Software Defined Vehicle of the Future”) on 4 November 2024
5	February 2025	300	• Highlighted key advancements in the SDV field, including insights from SIA CESA 2025 and the 2024 Eclipse SDV Hackathon. • Summarized FEDERATE’s participation in the recent webinar and EFECS 2024, and progress on SDV-building blocks. • Invited the community to join the Open Tech Talk and Discussion Series initiated by FEDERATE
6	May 2025	331	• Focused on the European Commission’s Automotive Action Plan, spotlighting AI-powered, connected, and autonomous vehicles via a proposed Connected and Automated Vehicle Alliance. • Positioned FEDERATE as a growing collaborative hub, integrating research, open-source, and alliances such as HAL4SDV, Twin-Loop, and Code4EV. • Recapped recent TechTalks (e.g., XEN virtualization with AMD), international events (SIA CESA 2025, Embedded World, FZI Open House), and promoted the upcoming European SDVoF Ecosystem Summit (20 May, Munich) and Automotive Software Strategies 2025
7	July 2025		• Captured key moments from the European SDVoF Ecosystem Summit 2025 in Munich, showcasing Europe’s push toward modular, interoperable, and open-source SDV platforms. • Shared updates on the FEDERATE Building Block Repository and featured presentations and project showcases from major industry players. • Emphasized strategic initiatives and widespread event participation, reflecting momentum and strengthened partnerships shaping digital mobility’s future.

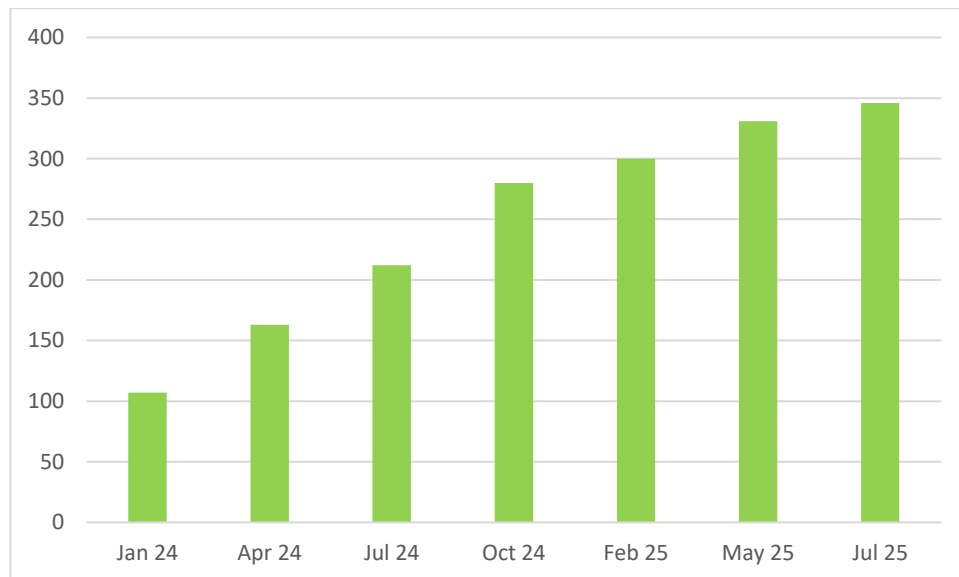


Figure 3: Number of subscribers/recipient of the first seven issues of the FEDERATE newsletter.

4.3 Geographical Distribution of the Stakeholders

In the context of deliverable D5.1 Stakeholder Engagement Strategy an analysis of the geographical distribution of the stakeholders of the SDVoF Ecosystem Forum was performed in order to identify, if all European Countries are equally represented. While the latter generally yields a strong similarity in the distribution, some distinctions were revealed: Organizations from Eastern and Southeastern Europe were underrepresented in the SDVoF community. Furthermore, there is a high number of German, French and Italian organizations and companies participating in the ecosystem. The lack of stakeholders from Eastern and Southeastern Europe could not be fully eliminated in the reporting period. Nevertheless, some promising progress is noticeable. For example, FEDERATE was able to gain a new associated member from Slovenia. With Elaphe LTD. an exceptionally active stakeholder joined the SDVoF Ecosystem Forum. It contributes valuable experience in the SDV-related field of the electric powertrain.

An interesting aspect is the high interest of stakeholders outside of the European Union. A significant number of subscribers of the SDVoF Ecosystem Forum is based in the USA, Japan, India, Taiwan and South Korea. The impression that stakeholders of these countries show a high interest in the European SDV-related activities was also confirmed at several international events, where FEDERATE was participating. As a consequence, this fact brings up the question of future strategic collaboration perspectives outside of the European Union.



Figure 4: Map visualizing the origin of the participating organizations and companies of EU-funded projects within the SDVoF initiative.

Figure 4 shows a map in which the origin of the participating organizations and companies of EU-funded projects within the SDVoF initiative are shown.

As the challenge of delivering the SDVoF is of high importance for countries with automotive industry, supply chain industry, semiconductor industry, research organizations and the open-source community, further growth of the ecosystem should aim to ensure participation from all European member states. Further European stakeholders will be addressed by the broad dissemination and open SDV events, organized by FEDERATE.

4.4 Project Website with Vision & Roadmap

The main objective of the website <https://federate-sdv.eu/> is to serve as a vehicle for the dissemination of the project activities and results, share information about SDV conferences and serve as a tool to join the open SDVoF Ecosystem Forum. The Landing page includes a registration form for visitors to register themselves for open software-defined vehicle of the future forum and subscribe for newsletters and invitations to events. The list of subscribers is used for further dissemination activities such as circulating the newsletters, etc.

The project website was developed to facilitate information-sharing between the consortium and the target groups in order to disseminate information on the project, such as the public deliverables of the project and upcoming FEDERATE events like SDV conferences that are an essential part of the project. Furthermore, it serves as the central hub for all information about FEDERATE. It will provide updates and information for visitors to learn more about FEDERATE.

The website contains central strategic documents, such as

- the Vision & Roadmap document for the SDVoF initiative, which has jointly been worked out by the FEDERATE partners. As the Vision & Roadmap document is key information for all stakeholders of the initiative and external target groups that should be encouraged to participate,.
- Reflections on the collaboration in the European Connected and Autonomous Vehicle Alliance (ECAVA) launched by the EC in 2025, to take the next step in providing a discussion forum and a strategic advisory forum to coordinate technological developments and cooperation between automotive stakeholders in both European and global markets and
- the 2025 Technology Roadmap of the European-driven Open SDV SW Platform Initiative, which aims to set the stage toward accelerating and deepening European collaboration on connected and autonomous vehicles under ECAVA

All of these are prominently visible on the landing page of the FEDERATE website: <https://federate-sdv.eu/>. The document can be read and downloaded by all visitors of the website.

The FEDERATE project website had 1,700 active users in the first project year. By M24, the website already has more than 2,700 users. This positive trend is confirmed by the increase of more than 1,000 website users over the past 12 months.

The development of website activity demonstrates that the FEDERATE website is an efficient tool for disseminating and promoting the project. The attendance and participation numbers of the events and webinar series promoted on the website further underline the effective operation of the website. For the third project year, the website will be supplemented by further content, stemming from both the project's results and deliverables and the established webinar and TechTalk series, while also highlighting key news and events from across the SDVoF ecosystem.

4.5 GitHub Repository

The identification of gaps in the maps of software building blocks and the identification of urgent needs of the automotive and open-source developer community are key tasks of the FEDERATE project. In order to collect and prioritize requirements and issues, an appropriate repository is necessary. A common backlog tracking infrastructure on GitHub, which is one of the major platforms in the open-source community, has been created for the project. The FEDERATE repository can be found on <https://github.com/CSA-FEDERATE/>. With this, the project aims to encourage stakeholders to contribute to the GitHub repository.

The repository allows for the collection of requirements for the SDVoF. A prioritization of the identified required building blocks enables an efficient issue tracking workflow for the open-source community and the projects of the SDVoF initiative. Furthermore, the existence of a repository-included documentation ensures that the commonly worked out solutions are understandable for everyone. This approach allows the current state of work and the work that should be done next to be readable by the entire open-source community. Since the backlog tracking is public, no additional action is required for read access only.

The FEDERATE consortium will pick up the content of the repository periodically and discuss the status in workshops, webinars, and SDV events. Finally, one of the project's objectives is to identify organizations that could maintain jointly worked out results, especially beyond the project execution time.

Since the FEDERATE repository was established in March 2024, 21 registered followers have subscribed the FEDERATE GitHub channel. This does not reflect users who visit the repository sporadically without subscribing. In total, 29 contributions were submitted to the FEDERATE GitHub channel. The FEDERATE team will make efforts to raise the number of subscribers and contributions by promoting the GitHub repository even more at upcoming events.

4.6 Webinars and TechTalks

Webinars followed by Q&A sessions are used as a bi-directional communication channel for the project. This tool helps to create a robust and consistent communication strategy. It is a possibility to engage the community by having a low entry barrier. It is planned to present and discuss the jointly worked out vision & roadmap. Furthermore, technical discussions can complete this format.

Table 4: Overview of past and scheduled Webinars and TechTalks.

Date	Content	Participants/Views
Webinars		
November 2024	Webinar #1: SDVoF Introduction	32
February 2025	Webinar #2: Vision & Roadmap of the SDVoF Initiative	48
Recorded		64
October 2025	Webinar #4: S-CORE project presentation	<i>scheduled</i>
October 2025	Webinar #5: RIGOLOETTO project presentation	<i>scheduled</i>
TechTalks		
February 2025	TechTalk #1 XEN Hypervisor	107
June 2025	TechTalk #2 Automotive Grade Linux and Its Building Blocks	80

Both the TechTalk and the Webinar series have thus been launched successfully. Regular online events are offered for different audiences. While the TechTalks allow for technical deep dives and active discussions around key elements of SDVoF solutions and challenges, the webinars provide an overview of the SDVoF ecosystems, the stakeholders, and strategic activities as well as project results, thereby also allowing for a quick introduction for stakeholders that have only recently come across the project or that are new to the ecosystem. Both series will be continued in the third year of the project.

4.7 Technical Workshops, Hackathons and SDV Events

The FEDERATE project will apply measures to maximize the impact of dissemination. Consequently, a participation of project members is necessary in order to carry out the exchange within the SDV community. The events are considered to be of two types:

- (1) external (networking, collaboration) events which are considered for possible FEDERATE participation;
- (2) events that are (co)organized and attended by FEDERATE.

During the (1) external (networking, collaboration) events, partners are expected to present the FEDERATE project, promote its framework and approach, and share project results. During such events, target groups

(stakeholders) can be reached more effectively through the networking model and active presence. Project updates as well as technical and strategical documents can be shared, discussed, and presented in the events of the automotive and software industries.

Within the consortium a list of events is periodically updated and maintained. Consequently, the consortium partners can consider a possible participation and presentation of the project in these suggested events. The list of events is not exhaustive and is updated regularly. The list of events is stored in a project SharePoint and presented to the consortium partners during the internal meetings for their consideration of possible participation.

Another type of events is co-organized and attended by FEDERATE (2). This type of events includes workshops, conferences, and hackathons, which are co-organized by FEDERATE and complements at least two of the four main objectives of ecosystem building and dissemination:

- (i) generate pre-competitive synergies on the topics of SDV in the European SDV community
- (ii) create a sustainable community for knowledge exchange on SDV topics

Therefore, the engagement of stakeholders, the exchange of experiences, the implementation of technologies and solutions, and the sharing of best practices are the most effective ways of collaboration towards the defined objectives. In order to make this happen, the methodology indicates participation and co-organization of:

- a. SDV conferences
- b. Technical workshops and
- c. Hackathons

In the second project year, the following key events contributed to building and strengthening links across the SDVoF ecosystem and especially between the automotive and open-source software domains:

Key Events

- In November 2024, the **Eclipse SDV Hackathon** convened over 60 technologists, innovators, and enthusiasts in Karlsruhe, Germany. This inspiring three-day event focused on brainstorming, coding, and prototyping innovative solutions to address real-world challenges in areas such as fleet management, software orchestration, and vehicle safety. The hackathon showcased the transformative potential of Eclipse SDV technologies while emphasizing the importance of teamwork and collaboration.
The event aligned with the FEDERATE project's mission to cultivate an engaging and dynamic Open European SDVoF Ecosystem. It demonstrated the collaborative spirit essential for breaking down technological silos. Key initiatives, including the Eclipse SDV Working Group's Blueprints, along with projects such as Eclipse Kuksa and Eclipse uProtocol, facilitated seamless cross-community collaboration among participants.
The success of the hackathon underscores the crucial role of effective leadership in fostering precompetitive collaboration among European organizations. By establishing shared goals and forming partnerships, leaders are positioning Europe as a global frontrunner in Software-Defined Vehicle (SDV) innovation.
- Furthermore, FEDERATE was part of the Conference Board of the SDV conference "**Open Community for Automotive (OCA)**" which took place from 22 to 24 October 2024 in Mainz, Germany (co-located

with Open Code Experience 2024 by Eclipse Foundation). Project partners from AVL and VDIVDE supported the organization team by setting the topic focus and selecting the most relevant abstracts. Moreover, the FEDERATE consortium encouraged relevant SDV stakeholders to submit abstracts and participate in the conference. The content and topics for further workshops, hackathons, and ecosystem activities are currently being collected from the project partners.

FEDERATE showcased the SDVoF roadmap, key building blocks, and collected community input to strengthen open collaboration and technical alignment. Interesting talks held by representatives of major OEMs, Tiers, and tool providers clearly indicated a strong interest in the industry. Multiple presentations by FEDERATE partners demonstrated commitment, addressing challenges and exploring potential solutions to redefine the future of mobility.

- **Convergence workshop** on February 7th 2025 in Munich to align the Eclipse projects (S-Core) with the HAL4SDV and SHIFT2SDV projects, national projects (SofDCar), VDA, PFA Autosar and Covesa. Initiated by the SDVoF Ambassador Dirk Walliser and organized by FEDERATE. This meeting helped to align the partners, initiatives, and projects with respect to the Building Blocks and SW artefacts and to eliminate redundancies and to exploit synergies.
- Regular **alignment between FEDERATE/SDVoF Ecosystem and the 2Zero and CCAM partnerships** as part of the strategic activities of WP 4 (see D4.5: Strategic roadmap).

A full list and description of events for the second project year is provided in D5.6: Second Dissemination and Communication Activities report.

The selection of events with high strategic relevance provided above demonstrates the extensive efforts undertaken by the various stakeholders of the SDVoF ecosystem to align their activities and to identify further areas and modes of collaboration. As (co-)organizer and often initiator of these alignments, the FEDERATE project provides essential links and strengthens the network throughout the SDVoF ecosystem. The alignments have already proven very effective in supporting projects, such as S-Core, during the initial integration into the project and its strategic landscape as they begin implementation. The alignments, also with the partnerships 2Zero and CCAM, will therefore be continued and expanded in the third project year, to ensure a broad agreement on the SDVoF roadmap and to further take advantage of synergies.

4.8 Yearly FEDERATE Networking Events

The FEDERATE project organizes an annual FEDERATE Networking Event as a major conference for the SDV community. In doing so, the project will encourage the community to collaborate actively and focus on research, development and innovation activities. An active contribution by the stakeholders will lead to a vivid open-source community, attracting other members to join.

The first **FEDERATE Networking Event** took place on the 23rd September 2024 in Vienna within the facilities of TTTech Auto AG. Around 100 guests participated in the event, which was free of charge.

In the second year, the FEDERATE Ecosystem Summit in Munich (May 20th 2025) again brought together the diverse stakeholders (more than 100) of the SDVoF Ecosystem for discussions on technical challenges, R&D priorities and policy developments. The event focused on strategic community stakeholders. Keynotes were given by German Federal Ministry of Research, Technology and Space (Oliver Hönig), Mercedes-Benz Tech

Innovation GmbH (Markus Rettstatt) on accelerating SDV development in open-source ecosystems, DG Connect for the EC (Max Lemke) on the importance of collaboration between public authorities and the industry and Infineon Technologies AG (Thomas Schneid). The event further addressed the question of transitioning from BB to Start of Production (SOP), cross-project collaboration and alignment with the CCAM partnership. A further highlight was the launch of the BB repository.

By the organization and execution of the FEDERATE Networking Event and Ecosystem Summit the project fosters a European initiative and orchestrates a strong open European collaborative community in maintaining and developing a European Software-defined vehicle Ecosystem. The identified challenges and needs as well as the jointly worked out results will be summarized in the report on the SDV conference.

Key Statistics

FEDERATE Networking Event on 23 rd September 2024:	101 registrations
SDV Ecosystem Summit 2025 by FEDERATE on 20 th May 2025:	129 registrations

A growing interest was thus observed for the second event, for which registrations eventually had to be limited due to the capacity of the location. The success of these events is not only underlined by the strong and growing interest but also the diversity of the participants which represent the vast majority of the projects and initiatives listed in section 3.2.

4.9 Social Media

Maintaining an active social media presence is crucial for the dissemination activities of the FEDERATE project, especially in terms of reaching and engaging with the target groups. Social media offers unique opportunities to connect with diverse audiences, disseminate information quickly, and foster community engagement around the project's developments. LinkedIn, in particular, is invaluable for targeting specific professional groups and stakeholders, enabling the project to tailor its messages to suit different audiences. It also provides robust tools for measuring the reach and impact of posts, which is essential for evaluating and refining dissemination strategies.

LinkedIn is considered to be the main project social media platform due to its more than 756 million users worldwide, 198 million daily active users in Europe (as of April 2021), and it offers the opportunity to get in touch with relevant target groups actively¹⁵. Furthermore, from a technical perspective, this platform offers a variety of design options for company posts, surveys that can be conducted, and articles that can be published, while other project social media accounts are more focused on advertisements, short messages, and hashtags. LinkedIn also offers various statistics on visitors, post updates, and followers, and in general, it is a suitable network for corporate communication as it is highly important for this project due to its targeting specific groups such as European OEMs, automotive tiers, semiconductor companies, relevant industry associations, and industrial SDV initiatives. The success of the usage of LinkedIn is based on relevant and up-to-date content. Members are encouraged to provide content, like, share, and comment on the posts to increase engagement and reach.

¹⁵ <https://www.linkedin.com/pulse/linkedin-social-media-tool-eduvision-opleidingen-en-training/>

Key Statistics

After reaching 481 followers at M6, 768 followers at M12, and 965 followers at M18, the LinkedIn project page is now followed by 1,222 users.

The significant growth in the number of followers thus continued in year two of the project. This confirms that the visibility and relevance of the project remain high. The interest from other SDV projects and initiatives also speaks for the pertinence of the alignment and coordination activities offered by the FEDERATE CSA.

5 Conclusion

This deliverable (D5.2) provides an overview of the development of the SDVoF ecosystem during the second project year. In this time span, the communication channels and network initiated during the first year were successfully expanded in reach, thereby allowing for further growth of the ecosystem (to include **28 associated members**). Expansion of the ecosystem was strategically driven with respect to the overarching goal of accelerating progress towards European SDVoF solutions and strengthening competitiveness in the global context. For this purpose, the results of projects and activities belonging to the SDVoF ecosystem are showcased, for example, at events, in webinars, and through the FEDERATE newsletter (from **280 to 346 subscribers** in the reporting period), to attract new stakeholders to join (as Associated Members or Ecosystem subscribers). Prominently the reach of the ecosystem was also extended to two new countries (Slovenia and Greece) while the links to other countries, e.g. Sweden and The Netherlands, was strengthened by the addition of new associated members and stakeholders. The second pillar of the activities concerns the strengthening, activation, and support of the network between those stakeholders that are already part of the ecosystem. Here, the alignment of strategic roadmaps, the identification and exploitation of synergies and the sharing of best practices constitute core objectives, which could also be achieved through (co-)organized events that allowed for exchange, amongst others, between automotive and open-source software stakeholders (e. g, OCA/OCX [Open Source for Automotive/Open Community Experience] conference 2024) or technical experts (e.g. TechTalk series) as well as between SDVoF projects and initiatives.

The project activities and results have thereby allowed for increased

- coordination: Roadmaps and strategic documents were developed and agreed across a wide range of stakeholders and projects.
- openness: All project results are public and the GitHub repository for BB allows all interested parties to contribute to and profit from SDV development, which is thus accelerated.
- take-up: Links to the application side of the value chain, e.g. via the CCAM and 2Zero partnerships or through the development of strategies for a shift to production, ensure that the results lead to tangible output for the SDVoF initiative.
- sustainability: By embedding the activities and results in a broad range of initiatives and ensuring links to strategic/governance levels the long-term effectiveness is strengthened.

The objective for the third and final year of the project is thus to continue the activities while further growing and strengthening the ecosystem. This will be achieved by complementing regular events (e.g. Webinars, TechTalks) with exchange and alignment opportunities, which are often set up at short notice to address urgent needs, but can also serve an integration purpose at the launch of new SDVoF projects. Besides a further expansion of the reach of the SDVoF ecosystem on a geographical level, ecosystem development and analysis will also focus on topical coverage, while continuously reviewing the prioritisation of activities with respect to the strategic objectives of WP2 to WP4. A central objective for the final project implementation year is also to prepare the SDVoF ecosystem for a self-sustained operation after the end of the FEDERATE project.

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