Contents

Pref	word ace onyms	;	xix xxi xxiii
1 I	ntroductio	on	1
1.1	History .		2
I. T	echnology	7	8
2 I	Planning A	lgorithms: Part 1	9
2.1	Localization	on: Sensor	10
	2.1.1	GNSS	10
	2.1.2	IMU	14
	2.1.3	UWB	15
2.2	Localization	on: SLAM	17
2.3	Prediction		20
	2.3.1	Model-base vs. Data-driven Approaches	20
	2.3.2	Hidden Markov Model	21
	2.3.3	Bayesian Filter Framework	24
	2.3.4	Kalman Filter	27
	2.3.5	Particle Filter	30
	2.3.6	KF for Fusion	33
2.4	Route Pla	nning: Global	35
2.5	Behavior _I	planning: with uncertainties comes RL	36
	2.5.1	Game Trees - Adversarial Search	38
	2.5.2	Markov Decision Process - Non-deterministic Search	41

	2.5.3	Reinforcement Learning - Uncertainty in Rules		45
2.6	Trajectory	Planning		50
	2.6.1	Path Planning: Search-Based		51
	2.6.2	Path Planning: Sample-based		52
	2.6.3	Path Planning: Kinodynamic-based		53
	2.6.4	Trajectory Refinement		53
Biblio	ography .			56
3 P	lanning A	lgorithms: Part 2		57
3.1	Sensor: Ca	mera and Lidar		57
3.2	Sensor Un	derstanding: 3D Object Detection		57
3.3	Sensor Un	derstanding: Road and Lane Detection		58
3.4	HD Map			58
3.5	Localizatio	on: Odometry		59
3.6	SLAM: Lo	calization and Mapping		59
3.7	Object Tra	ncking		59
3.8	Prediction			60
3.9	Route Plan	nning		60
3.10	Behavior F	Planning (w/ RL)		60
3.11	Trajectory	Planning		61
3.12	End-to-En	d Approach		61
4 D	ata Mana	gement for Auto Driving		63
4.1	Data Ecos	ystem		63
	4.1.1	Data Strategy		63
	4.1.2	Data Productization Process		64
	4.1.3	Interplay of Core Concepts		65
4.2	Data Arch	itectures		66
	4.2.1	Data Warehouse		67
	422	Data Lakes		68

	4.2.3	Data Mesh	69
4.3	Data Gove	ernance	72
	4.3.1	Organization View: Data Governance Roles	73
	4.3.2	Processes View: Data Governance Activities	74
	4.3.3	People View: Trust and Ethical Considerations	74
	4.3.4	Technology View: Golden Source and Ownership	75
	4.3.5	Regulatory View: EU Data Governance Legislation .	76
4.4	Data Man	agement	77
	4.4.1	Data Lifecycle	77
	4.4.2	Extract, Transform, and Load	78
	4.4.3	Data Quality	80
	4.4.4	Data Integration and Migration	82
	4.4.5	Internal and External Data	84
	4.4.6	Metadata Management	85
	4.4.7	Data Catalog	87
	4.4.8	Data Security	88
4.5	On-Vehicle	e Data Collection System	89
4.6	Case Stud	y: Nvidia'S Al Infrastructure	89
4.7	Case Stud	y: Autonomous Driving Data Framework on AWS	89
4.8	Case Stud	y: Data Platforms in Apollo and Volcano Engine	89
Bibli	ography .		89
5 (Cooperativ	e Driving with V2X	91
6 H	Iardware I	Platform: Chip and Control	93
6.1	Chips: Fro	m General to Specialized	95
	6.1.1	A Brief History of Automotive Processors	95
	6.1.2	CPU, GPU, ASIC, and FPGA	96
	6.1.3	Chip Ecosystem	97
6.2	Evolution	of Electrical/Electronic Architecture on Vehicles	97

	6.2.1	Vehicle Domain Controller	8
	6.2.2	Cockpit Domain Controller	8
	6.2.3	ADAS/AD Domain Controller 9	8
6.3	Vehicle-wi	de Communication	8
	6.3.1	CAN and LIN Bus	9
	6.3.2	Automotive Ethernet	9
	6.3.3	FPD-Link and GMSL	9
6.4	ADC Chip	Example: Nvidia Architecture 9	9
	6.4.1	Computing	0
	6.4.2	PCIE	9
	6.4.3	Safety	9
6.5	CDC SoC	Example: Qualcomm's Snapdragon Cockpit 11	8
6.6	Tesla's Ce	entralized Vehicle Computer Architecture 12	0
6.7	Other Arc	hitectures	1
	6.7.1	Mobiley's architecture	1
	6.7.2	Waymo's architecture	4
	6.7.3	Other Automotive Chip Makers	5
Bibli	iography .		5
7 S	Software P	latform 12	7
7.1	Software A	Architecture Overview	7
7.2	System So	oftware: Abstraction of Hardware	9
	7.2.1	Hypervisor	9
	7.2.2	BSP	1
7.3	Middlewar	re: AUTOSAR	1
	7.3.1	AUTOSAR Software Architecture	2
	7.3.2	SWC Development Process	4
	7.3.3	Adaptive AUTOSAR	6
7.4	System So	oftware: OS Core	6

7.5	OS Core E	xample: Nvidia DriveOS
	7.5.1	Foundation Service
	7.5.2	Guest OS on DriveOS
	7.5.3	Security and Safety Services
7.6	Functional	Softwares
7.7	Functional	$\textbf{Middelware: DriveWorks} \dots 140$
7.8	Applicatio	n Softwares
7.9	Other Aut	onomous Driving Platforms
	7.9.1	Baidu Apollo and CyberRT
	7.9.2	$ \begin{tabular}{lllllllllllllllllllllllllllllllllll$
	7.9.3	FSD Platform of Tesla
Bibli	ography .	
8 E	Battery	147
8.1	v	on
8.2		rials
	8.2.1	Lithium
	8.2.2	Nickle
	8.2.3	Cobalt
	8.2.4	Manganese
	8.2.5	Graphite
8.3	Battery C	ell Components
	8.3.1	Cathode
	8.3.2	Anode
	8.3.3	Electrolyte & Separator *
	8.3.4	Future Technologies *
	8.3.5	Vertical Integration *
8.4		lanufacturing
8.5	Battery C	ost Reduction

8.6	Battery Re	ecycle	167
	8.6.1	Technologies	167
	8.6.2	Benefit of Recycling	169
	8.6.3	Cost and Profit of Recycling	170
	8.6.4	Markets	172
8.7	Battery Sa	ıfety	173
8.8	Reflection		176
	8.8.1	Northvolt: A Lesson Well Learnt	176
	8.8.2	Vertical Integration	177
Bibli	ography .		179
II. E	Busisness		183
9 G	lobal Mar	ket Dynamics	185
9.1	Market Gr	owth and Forecasts	185
9.2	Demand D	rivers and Adoption Factors	187
9.3	Barriers to	Adoption	189
9.4	United Sta	tes: Fragmented Leadership	192
	9.4.1	Major players	194
9.5	China: Pol	icy-Driven Innovation at Scale	197
	9.5.1	Major players	199
9.6	Europe: Re	egulation-Driven Advancement	202
	9.6.1	Major players	204
9.7	Regional C	Comparison and Trends	208
9.8	Future Ou	tlook and Strategic Implications	213
10 V	alue Chair	and Ecosystem	217
10.1	Value Cha	in Dynamics in Autonomous Driving	217
	10.1.1	From Manufacturing-Centric to Data-Centric Value	
		Creation	218

	10.1.2	New Activities and Business Models	220
10.2	Ecosystem	Strategy and Co-Innovation	221
	10.2.1	The Wide Lens: Complementary Innovations and	
		Adoption Chain	222
	10.2.2	Crossing the Chasm: From Pilots to Mainstream \dots	224
10.3	Disruptive	Innovation and Competitive Dynamic	226
	10.3.1	Incumbents, Entrants, and the Innovator's Dilemma	227
	10.3.2	Lessons from Strategic Experimentation: Cruise, Uber ATG, and Others	228
10.4	Global Lan	dscape: US, China, and Europe	231
	10.4.1	United States: Tech Ambition Meets Industrial Legacy	231
		China – State-Orchestrated Ecosystem and Accel-	
		eration	233
	10.4.3	Europe – Regulation and Safety Shaping the Field .	235
10.5	Future Out	tlook and Strategic Implications	237
11 B	susiness Me	odels	241
11.1	Mobility-a	s-a-Service (MaaS) – The Robotaxi Revolution	242
11.2	Data Mone	etization – Fueling the Data Economy on Wheels	248
11.3	Subscription	on and Usage-Based Models – From One-Off Sales	
	to Recurring	ng Revenue	254
11.4	Platform-B	Based Models – Operating Systems and Ecosystems	
	of Autonor	ny	260
11.5		ership and B2B Services – Autonomous Vehicles in	
		nd Business	
11.6	Strategic F	rameworks and Cross-Industry Comparisons	273
11.7	Conclusion	- Future Trajectories and Strategic Implications	280
11.8	Comparation	ve Summary of Autonomous Driving Business Models	286
12 Iı	nvestment	and Funding	289
12 1	Global Inve	ostmont Landscano	200

	12.1.1	United States: Venture Capital, SPAC Boom, and	200
		Tech Titans	290
	12.1.2	China: State-Backed Capital and the Baidu/Pony.ai	202
	10.1.2	Ecosystem	292
	12.1.3	Europe: OEM-Led Conservatism and Policy-Driven Innovation	295
12.2	Г I M		
12.2		echanisms and Stages	298
		Early-Stage R&D (Seed to Series B)	298
		Growth and Fleet Scaling (Series C and beyond)	299
	12.2.3	Public Market Exits (IPOs and SPACs)	301
	12.2.4	Mergers, Acquisitions, and Consolidation	304
12.3	Financial v	s. Strategic Investors	306
12.4	Case Studi	es: Funding Journeys of Notable AV Companies	310
	12.4.1	Waymo: The Well-Funded Pioneer	310
	12.4.2	Cruise: Startup to GM Subsidiary and the Limits of	
		Hype	312
	12.4.3	Aurora: SPAC-Funded Aspirant with Strategic DNA	315
	12.4.4	Mobileye: The Incremental Approach and Public Reen-	
		try	317
	12.4.5	Nuro: Delivery Robots and the Long Road for a	
		Startup	319
	12.4.6	Zoox: Big Vision, Big Funding, Amazon Buyout	321
	12.4.7	Pony.ai: A Binational Unicorn Bridging East and West	323
12.5	Hype Cycle	es, Bubbles, and Resets	325
	12.5.1	The 2016–2018 Boom: Moonshots and Sky-High	
		Valuations	325
	12.5.2	The SPAC Bubble of 2020–2021: Exuberance Reborn	326
	12.5.3	2022–2023: Corrections, Consolidation, and Caution	328
12.6	Compariso	ns with Adjacent Sectors	330
	12.6.1	Electric Vehicles: Parallel Hype, Quicker Payoff?	331

12.6.2 Generative AI: The New Hype Magnet	332
12.6.3 Cloud and Platform Players: Stability and Strategic	
Investments	334
12.7 Future Outlook and Conclusion	336
13 Strategic Alliances	341
13.1 Strategy Frameworks: Why Partner in the Autonomous Vehicle	
Ecosystem?	343
13.1.1 Porter's Perspective: Competition, Complementors,	
and the "Build-Buy-Partner" Dilemma	343
13.1.2 Moore's Ecosystems: Business Communities and Key-	
stone Players	345
13.1.3 Adner's Wide Lens: Orchestrating Co-Innovation and	
the Value Network	347
13.2 Alliance Structures in Autonomous Driving: Models and Trade-	
offs	349
13.2.1 Bilateral Partnerships: Two-Player Team-Ups for Mu-	
tual Gain	350
13.2.2 Joint Ventures and Equity Alliances: Deeper Com-	
mitments with Shared Control	352
13.2.3 Industry Consortia and Ecosystems: Many-Player Al-	
liances and Open Collaboration	356
13.2.4 "Coopetition" and Unusual Alliances: Collaborating	
with Competitors	359
13.3 Case Studies: Alliance Strategies of Key Autonomous Driving	
Players	361
13.3.1 Waymo: Partnering Broadly to Build a Self-Driving	
Service Ecosystem	362
13.3.2 Mobileye: An Ecosystem Supplier Scaling through	
Automaker Alliances	366

13.3.3	Tesla: The Lone-Wolf Path – Vertical Integration	
	over Alliances	369
13.3.4	Nvidia: Powering an Alliance Ecosystem via the DRIVE Platform	373
13.3.5	Aurora: Aligning Automakers, Shippers, and Big Tech in a Triple-Helix of Partnerships	377
13.3.6	Baidu Apollo: Open-Source Alliance and the "Android of AV"	380
13.3.7	Amazon, Zoox, and Rivian: A New Entrant's Multi- Pronged Alliance Strategy	384
13.3.8	Other Notable Alliances: Cruise, Pony.ai, and WeRide	387
13.4 Challenges	s and Trade-offs in Autonomous Driving Partnerships	389
13.5 Conclusion	and Outlook: The Future of Partnerships and Al-	
liances in	Autonomous Driving	393
14 Industry Ve	erticals 3	899
14.1 Autonomo	ous Ride-Hailing Services (Robotaxis)	399
14.1.1	Technology Status and Deployment Progress 4	400
14.1.2	Business Model and Economic Considerations 4	402
14.1.3	Regulatory and Societal Factors	403
14.1.4	Strategic Perspectives and Challenges	406
14.2 Autonomo	ous Freight and Trucking	408
14.2.1	Technical Progress and Operational Design Domain 4	408
14.2.2	Business Case, Partnerships, and Economics 4	410
14.2.3	Regulation and Safety for Driverless Trucks 4	413
14.2.4	Strategic Outlook and Industry Dynamics 4	415
14.3 Last-Mile	Delivery and Logistics Robots	417
14.3.1	Use Cases and Technical Design of Delivery Robots 4	417
14.3.2	Economic Drivers and Operational Challenges 4	419
14.3.3	Regulatory and Social Aspects	422

	14.3.4	Strategic Outlook and Innovations	424
14.4	Public Tra	nsportation and Shared Mobility	426
	14.4.1	Early Deployments of Autonomous Shuttles	426
	14.4.2	Integration with Transit and Mobility Services	429
	14.4.3	Regulatory and Implementation Challenges	430
	14.4.4	Current Status and Outlook	432
14.5	Industrial	and Specialized Autonomy (Ports, Mining, Agricul-	
	ture, etc.)		434
	14.5.1	Mining: Autonomous Haulage and Equipment	434
	14.5.2	Ports and Logistics: Automated Terminals and Ve-	
		hicles	436
	14.5.3	Agriculture: Autonomous Tractors and Farm Equip-	
		ment	438
	14.5.4	Strategic Implications and Cross-Domain Learning .	440
14.6	Forward-Lo	ooking Synthesis and Strategic Outlook	442
		ooking Synthesis and Strategic Outlook	442 449
15 C	ommercia)		449
15 C 15.1	ommercia Strategic I	lization Strategies	449
15 C 15.1 15.2	ommercia Strategic I Pilot Prog	lization Strategies Framing: From Prototype to Commercial Deployment	449 449 451
15 C 15.1 15.2 15.3	Strategic I Pilot Prog Service De	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455
15 C 15.1 15.2 15.3 15.4	Strategic I Pilot Prog Service De	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455
15 C 15.1 15.2 15.3 15.4	Strategic I Pilot Prog Service De Regulatory Operationa	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455 459
15 C 15.1 15.2 15.3 15.4 15.5	Strategic I Pilot Prog Service De Regulatory Operations	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455 459
15 C 15.1 15.2 15.3 15.4 15.5	Strategic I Pilot Prog Service De Regulatory Operationa ships Business N	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455 459
15 C 15.1 15.2 15.3 15.4 15.5	Strategic I Pilot Prog Service De Regulatory Operationa ships Business N zation	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455 459 462
15 C 15.1 15.2 15.3 15.4 15.5 15.6	Strategic I Pilot Prog Service De Regulatory Operations ships Business N zation	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts esign and Customer Experience in AV Offerings Navigation and Public-Private Alignment al Scale-Up: Fleet, Infrastructure, and Local Partner- Model Execution: Pricing, Channel Strategy, Moneti-	449 449 451 455 459 462 467 472
15 C 15.1 15.2 15.3 15.4 15.5 15.6 15.7 15.8	Strategic I Pilot Prog Service De Regulatory Operationa ships Business N zation Trust-Build	lization Strategies Framing: From Prototype to Commercial Deployment rams and Phased Rollouts	449 449 451 455 459 462 467 472

16 Safety Standards and Regulations	489
16.1 ISO 26262: Functional Safety	489
16.1.1 Concept Phase	492
16.1.2 Product Development	497
16.1.3 Other Components in ISO 26262	498
16.1.4 ISO 26262 and Machine Learning	498
16.2 ISO 21448: Safety Of The Intended Functionality	498
16.3 ISO 21434: Information Safety	498
16.4 Standards Systems	498
16.4.1 ISO/FDIS 34502	498
16.4.2 ISO/TR 4804	498
16.4.3 ISO AWI TS 5083	498
16.4.4 SAE Standards	498
16.4.5 BSI PAS Standards	498
16.4.6 ISO 4272: Group Driving	499
III. Past and Current Experiences	500
17 Case Studies	501
18 What the Industry is Thinking: Interviews	503
Index	504