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# Next-generation Zonal Communication Network Topology and Chip Industry Research Report, 2024

June 2024

# The in-vehicle communication architecture plays a connecting role in automotive E/E architecture

The in-vehicle communication architecture plays a connecting role in automotive E/E architecture. With the evolution of automotive E/E architecture, in-vehicle communication technology is also developing continuously. The core of communication technology development is the communication interface protocol. In the in-vehicle communication framework based on next-generation Zonal architecture:

**BUS communication:** It mainly includes automotive Ethernet (10M/100M/1000M/2.5G/5G/10G, etc.), CAN-XL, CAN-FD, etc. The underlying layer of CAN-XL/CAN-FD BUS communication is the transceiver chip, and automotive Ethernet chip includes PHY chip and switch chip. Under the Zonal architecture, automotive backbone network will use automotive Ethernet, and local low-speed networks will continue to use CAN-FD/LIN in a short term. After the 10Base-T1S automotive Ethernet and CAN-XL products are scaled up, they may become the main application of low-speed networks in Zonal architecture.

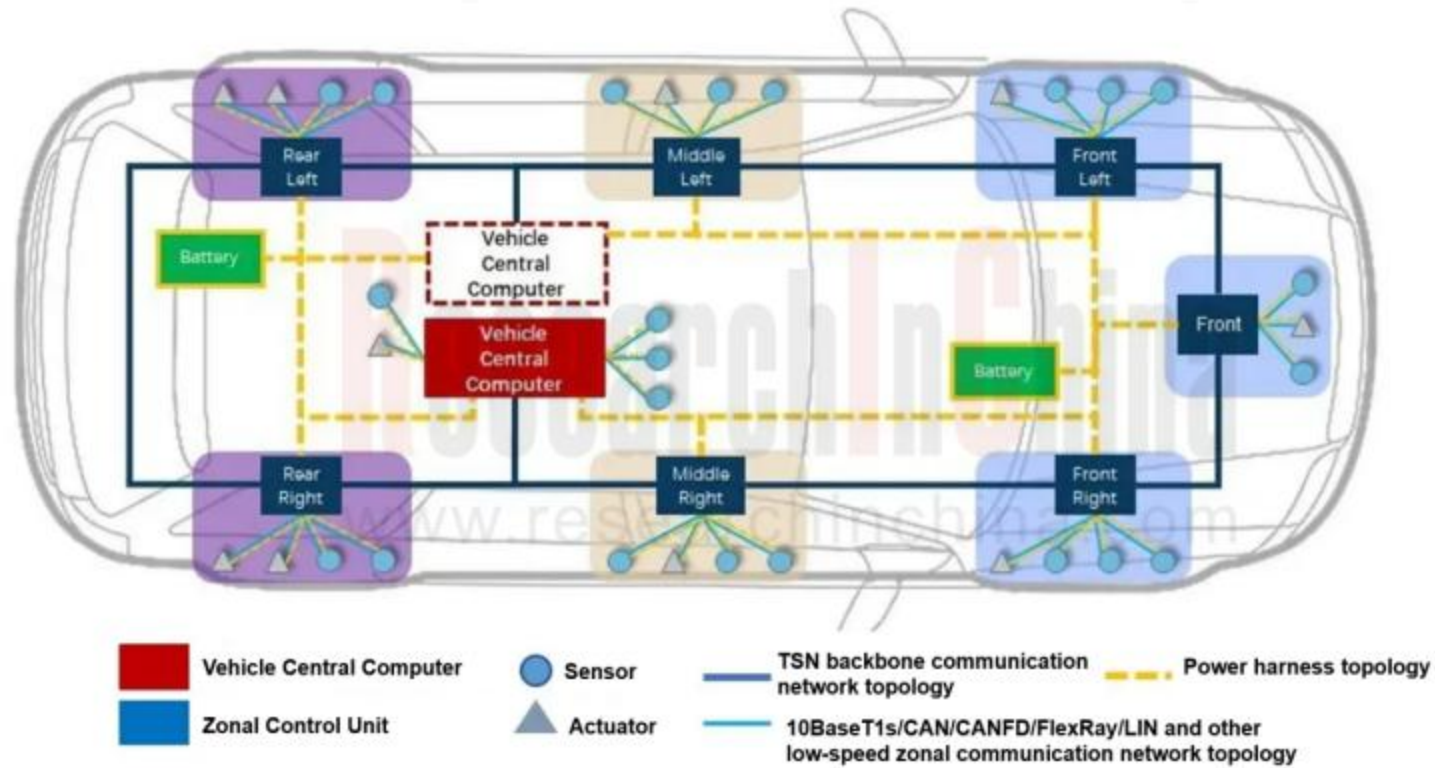
**High-speed video streaming communication:** Currently, there are multiple protocols for vehicle SerDes chips, mainly including FPD-Link, GMSL, MIPI A-PHY, ASA-ML, etc. Automotive high-speed video streaming transmission uses serial transmission technology, which requires a SerDes to implement. Major application scenarios include video transmission from camera to ADAS SoC and content transmission from cockpit SoC to vehicle display.

**Short-range wireless communication:** Mainly includes Bluetooth, WIFI, NFC, UWB and NearLink, and main application scenarios include phone-car connectivity, digital car key, wireless BMS, etc.

**Inter-chip communication:** Mainly includes PCIe, NVLink and other protocols. Under the central supercomputing + Zonal architecture, there are many cascading applications between multiple SoC chips. PCIe is mainly used for communication between CPU and GPU, and NVLink is mainly used for communication between GPUs.

# In-vehicle Communication Network Topology for Zonal Architecture

## In-vehicle Communication Network Topology for Zonal Architecture



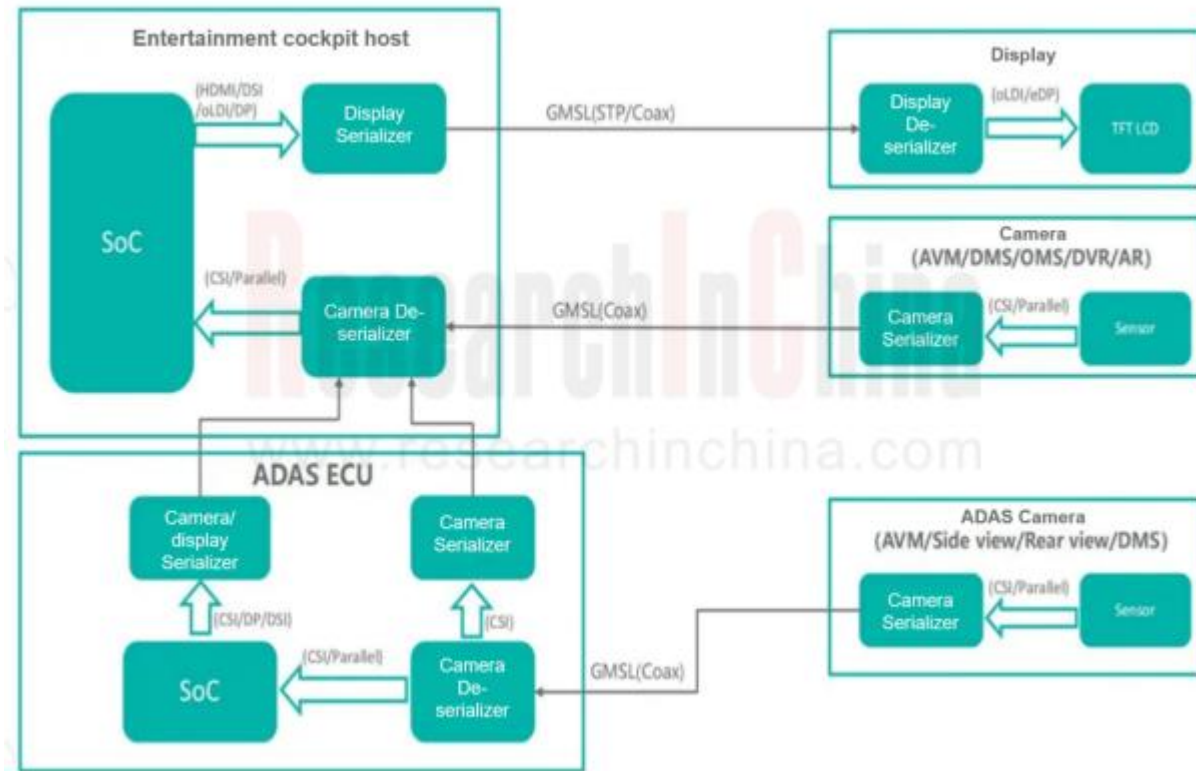
Source: Volvo

# High-speed video streaming communication: How can in-vehicle SerDes chips help OEMs reduce costs and increase efficiency?

**High-speed video streaming communication: How can in-vehicle SerDes chips help OEMs reduce costs and increase efficiency?**

Vehicle SerDes chip is mainly used for real-time data transmission of image and video signals from in-vehicle camera to ADAS domain controller, cockpit domain controller, vehicle display, etc. It is usually composed of two chips: Serializer and Deserializer. A complete set of communication protocols must be available between serializer and deserializer to achieve complete, secure and accurate data transmission.

## Application of SerDes Chips in Automotive Field



Source: ADI

# Necessity of 10G+ vehicle SerDes communication:

**Necessity of 10G+ vehicle SerDes communication:** The development of 10G+ vehicle SerDes chips is closely related to development trends of automotive central integration + Zonal architecture, end-to-end autonomous driving, in-vehicle through-type integrated display screen and ultra HD image quality.

**HD camera:** In deep learning models, high-resolution image data is required for target recognition. In order to be able to identify and monitor targets at greater distances, some manufacturers have launched automotive cameras with more than 8MP. For example, Sony Semiconductor released the 17MP automotive image sensor IMX735 in 2023; Sunny Optical also announced the completion of R&D of a 17MP front-view automotive lens. At present, an 8MP camera generates up to 5.76Gbps of data per second. In the future, to achieve data transmission of higher-definition cameras, the bandwidth requirement must reach 10Gbps or more.

**High-resolution display:** The bandwidth requirements for information exchange between intelligent cockpit domain and in-vehicle display are also increasing. Taking Geely Galaxy E8 as an example, the bandwidth requirement for its 45-inch 8K through-type integrated screen can reach 12.7Gbps.

**Necessity of in-vehicle SerDes chip integration solution:** In the foundation model era, if a camera can achieve 320° full-view coverage, the number of cameras required will double. Vehicle SerDes chips are used in pairs. If a single camera is equipped with a pair of serializer/de-serializers, the demand for vehicle SerDes chips in the vehicle will surge. The additional cables, plug-ins and other related connectors will not only be detrimental to vehicle lightweight, but will also increase its manufacturing cost, which is contrary to the overall development trend of the vehicle and cost reduction needs of OEMs. For vehicles using the next-generation Zonal architecture and AI foundation model, the integrated solution of serializers and de-serializers is particularly important, which helps to simplify circuit design, reduce the use of SerDes chips and wiring harnesses and connectors.

# Rsemi's self-developed single-channel 16Gbps automotive high-performance SerDes chip R-LinC

Automotive SerDes protocols can be mainly divided into private protocols and public protocols, and current global automotive SerDes market is dominated by the former. ADI's GMSL and TI's FPD-Link almost monopolize the global automotive SerDes market share. In order to break the industry monopoly, more and more automotive SerDes chip vendors have emerged in China, such as Rsemi, Kungao Micro, Motorcomm, etc.

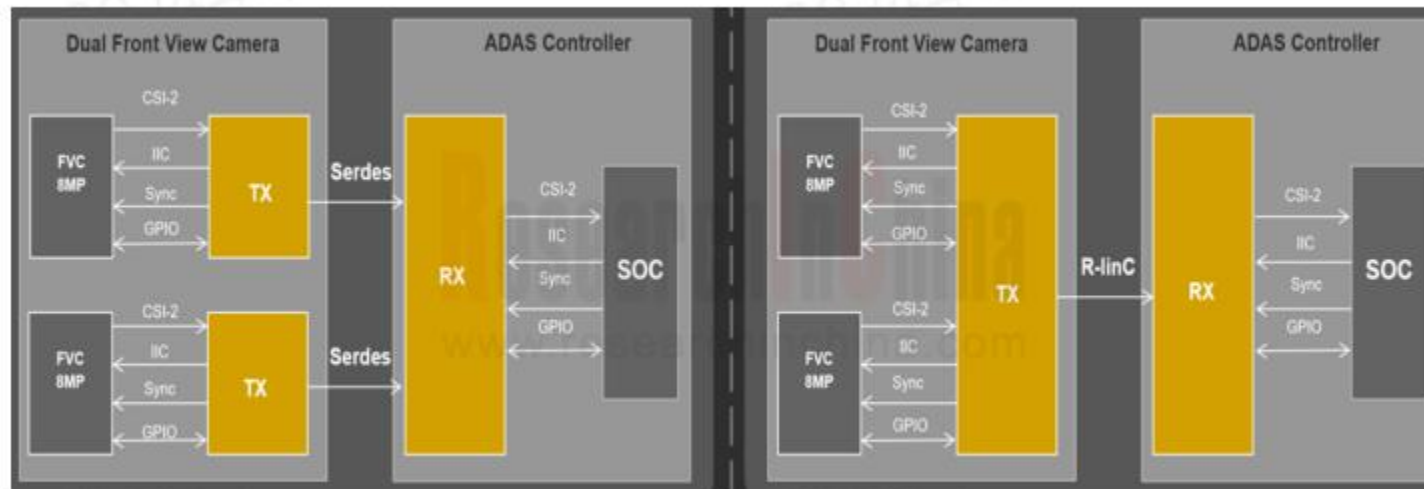
Since TI and ADI have already occupied the first-mover advantage and absolute monopoly in the low-speed automotive SerDes products (1.6Gbps~6Gbps), Chinese manufacturers have planned high-speed automotive SerDes products (above 10Gbps) to meet the high-bandwidth needs of future intelligent vehicles in order to seize the first-mover advantage in mass production of high-speed automotive SerDes products.

Take Rsemi's self-developed single-channel 16Gbps automotive high-performance SerDes chip R-LinC as an example. It is backward compatible with the full rate of 16Gbps-1.6Gbps, uses a private protocol, and supports long-distance transmission of 15 meters. Built with a 22nm process, the insertion loss compensation capability reaches more than 30dB, and can achieve real-time adaptive equalization. R-LinC is mainly used for long-distance real-time transmission from sensors such as automotive cameras to SoCs. Its single-channel 16Gbps rate can meet extreme needs of current ultra-high-resolution cameras (such as 17MP) for image data transmission.

For sensor side, with the support of 16Gbps high-speed transmission, one Rsemi R-LinC serial chip can connect to two 8MP high-definition cameras simultaneously, and a single wiring harness can transmit two video streams, saving one chip and one set of wiring harnesses and connectors, helping to efficiently reduce costs for current mainstream visual sensor solutions.

On the controller side, a single Rsemi R-LinC deserializer can realize 6-way input and a high-speed data throughput of up to 6\*16Gbps (12 8MP cameras), while supporting a forwarding capability of 16Gbps. Therefore, 1-2 de-serializers can cover the mainstream intelligent driving vision solutions in the current market. Combined with new 6-in-1 connector, the board-level hardware design area is smaller, the device layout is better, and the system solution cost is greatly reduced.

## Rsemi Serial Chip 2-in-1 Solution



Source: Rsemi

## Rsemi Deserialization Chip 6-in-1 Solution



Source: Rsemi



# Rsemi has joined hands with Sony Semiconductor to launch the "Intelligent Driving 5V Super Vision Solution".

Currently, average number of cameras configured in visual sensors of intelligent vehicles has exceeded 5. High-end intelligent driving requires 11 cameras to complete the coverage of entire vehicle's surrounding environment. For this reason, Rsemi has joined hands with Sony Semiconductor to launch the "Intelligent Driving 5V Super Vision Solution".

## Rsemi & Sony Semiconductor "Intelligent Driving 5V Super Vision Solution"



Source: Rsemi

# Three public standards for automotive SerDes

There are currently three public standards for automotive SerDes: MIPI A-PHY, ASA-ML, and HSMT.

**Three Public Standards for Automotive SerDes**

Automotive SerDes public protocol	MIPI A-PHY	ASA Motion link	HSMT
Start time	2018	2019	2020
Main promoter	MIPI standardized organization, Valens, etc.	BMW, Ford, Marvell, Broadcom, etc.	Huawei, etc.
Feature	Established earlier, relatively more mature	OEMs' push	Huawei's push in Chinese market

Source: ResearchInChina

Valens is an important contributor to the MIPI A-PHY standard and the first vendor on the market to provide chipsets (VA7000 series) that comply with A-PHY standard, targeting ultra-high-speed network applications in ADAS and autonomous drive subsystems. In the planning route of Valens A-PHY chips, it is expected to launch a more powerful VA7100 chipset in 2025. A single interface can support bandwidths of more than 16Gbps, resolutions of up to 17MP, and can access camera and radar data simultaneously. At the processing receiving end, a single link can support bandwidths of more than 16Gbps, enabling the transmission or exchange of multiple channels of real-time video and data, and all sensor data can be flexibly exchanged and copied.

## Valens Next-generation VA7100 Chipset Based on MIPI A-PHY Standard



Source: Valens

The ASA Motion Link (ASA-ML) specification is mainly promoted by BMW, Ford, Marvell, and Broadcom. In March 2024, BMW Group announced at the Automotive Ethernet Conference in Munich that it would introduce standardized ASA-ML in 2027. In addition, BMW and Microchip also cooperated to conduct a chipset concept verification based on the ASA-ML standard. In the future, BMW is very likely to use Microchip's VS77X chipset for high-speed video image transmission between sensors and domain controllers & displays.

The HSMT standard is mainly promoted by Chinese companies such as Huawei.

However, public protocols nowadays such as A-PHY, ASA-ML, and HSMT have not been finally frozen and are still being updated. They have not passed the verification of large-scale product shipments, nor have they been widely accepted and adopted by the industry. There are still many uncertainties.

Since SerDes is a bridge chip across components, it is used in pairs in actual applications, and interoperability is not a rigid requirement. Relatively speaking, private protocols are more efficient, simple and mature, so the development path of SerDes standardization remains to be seen.

# How to build the next-generation in-vehicle communication architecture under Zonal architecture?

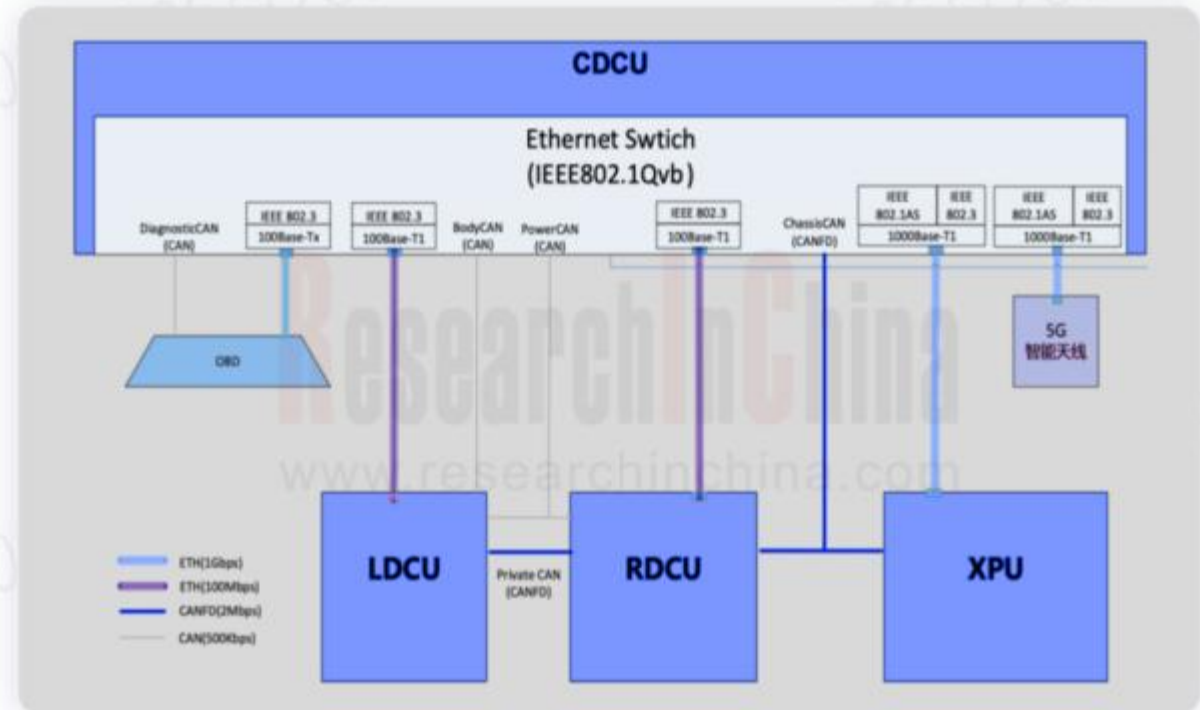
## How to build the next-generation in-vehicle communication architecture under the Zonal architecture?

In next-generation Zonal architecture, after realizing functional centralization, the number of ECUs in the car will be greatly reduced. Functional centralization is mainly guided by software algorithms, but to be truly implemented, it must rely on physical hardware such as controller, SoC, communication chip, and power chip in zonal controller and central computing platform to support it.

## Communication requirements of cross-domain integration + Zonal architecture for in-vehicle backbone network

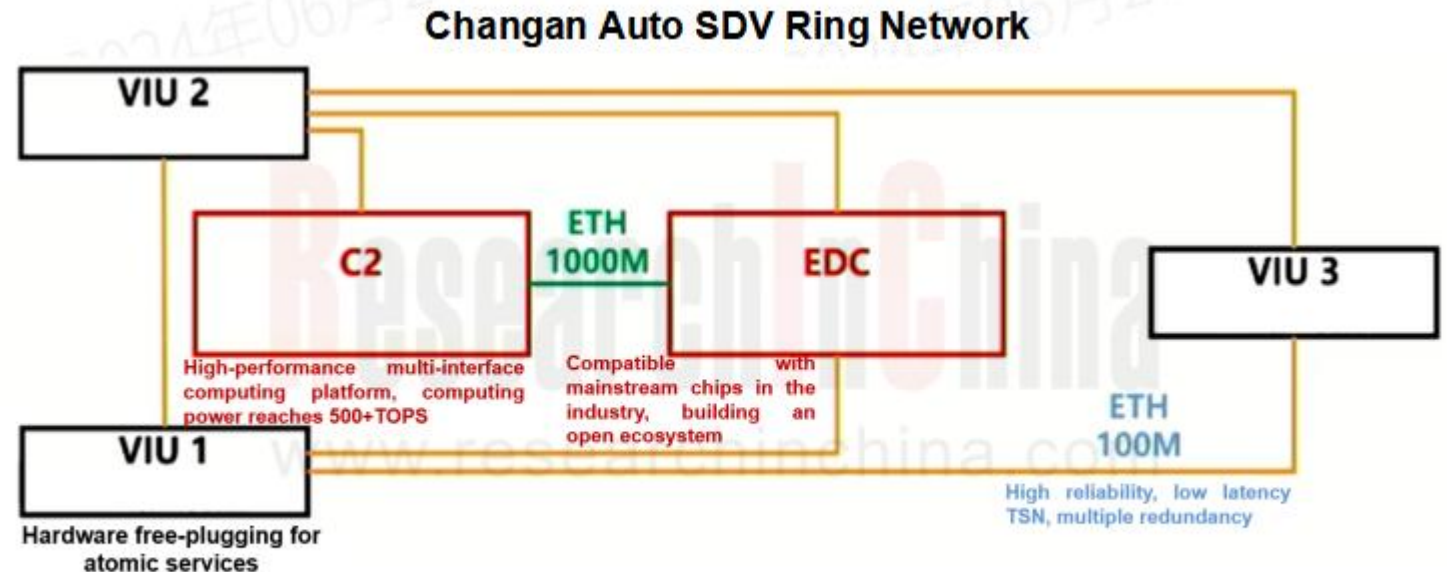
**XPeng Motors X-EEA3.0:** The central supercomputer C-DCU integrates cockpit, partial vehicle body, central gateway and other functions. In the communication of this central supercomputer, C-DCU contains one Automotive Ethernet switch to support TSN, which is connected to XPU and 5G smart antenna through 2 channels of Gigabit Ethernet 1000Base-T1. It also contains 6 channels of 100M Ethernet, 2 of which are connected to the left and right Zonal controllers (LDCU, RDCU). MCUs of central computing platform and two zonal controllers are all Renesas' third-generation 28nm high-speed MCUs.

## XPeng Motors Central Supercomputing C-DCU Communication Topology



Source: XPeng Motors

**Changan Auto SDV ring network:**  
Changan Auto's SDV ring network: Changan Auto SDA architecture consists of C2 (central computer: computing power 508TOPS) + EDC (experience data computer: computing power 2000GFLOPS) + three zonal controllers VIU. The architecture adopts vehicle Ethernet ring network communication technology, with 100M Ethernet as the backbone network. C2 and EDC communicate through Gigabit Ethernet. At the same time, TSN, ring network redundancy and other technologies are applied to solve the problems of disordered data transmission and packet loss in traditional Ethernet.



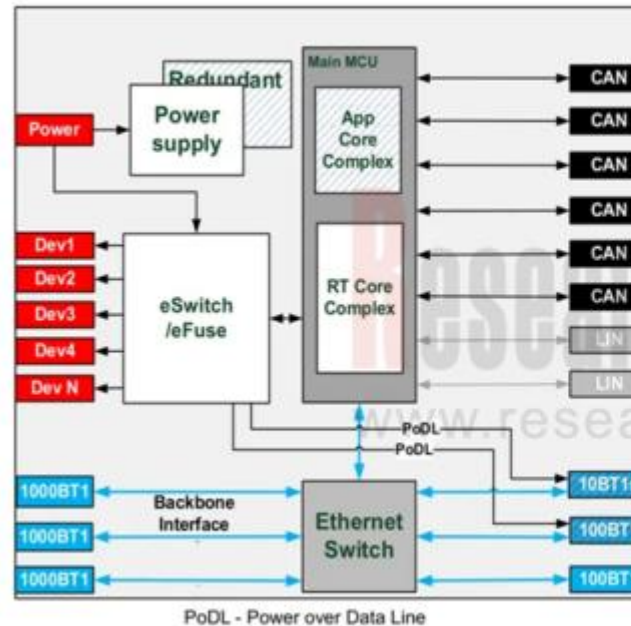
Source: Changan Auto

# Communication requirements of next-generation central computing + Zonal architecture for in-vehicle backbone network

## Communication requirements of next-generation central computing + Zonal architecture for in-vehicle backbone network

In the next-generation central computing + Zonal architecture, Zonal controller will generally integrate Zonal gateways, high-speed communication MCUs, vehicle Ethernet switch chips, Ethernet PHY chips and other communication-related chip devices. Each Zonal gateway contains an Ethernet switch, and a car may need 6-7 chips.

## Typical Zonal Gateway Design



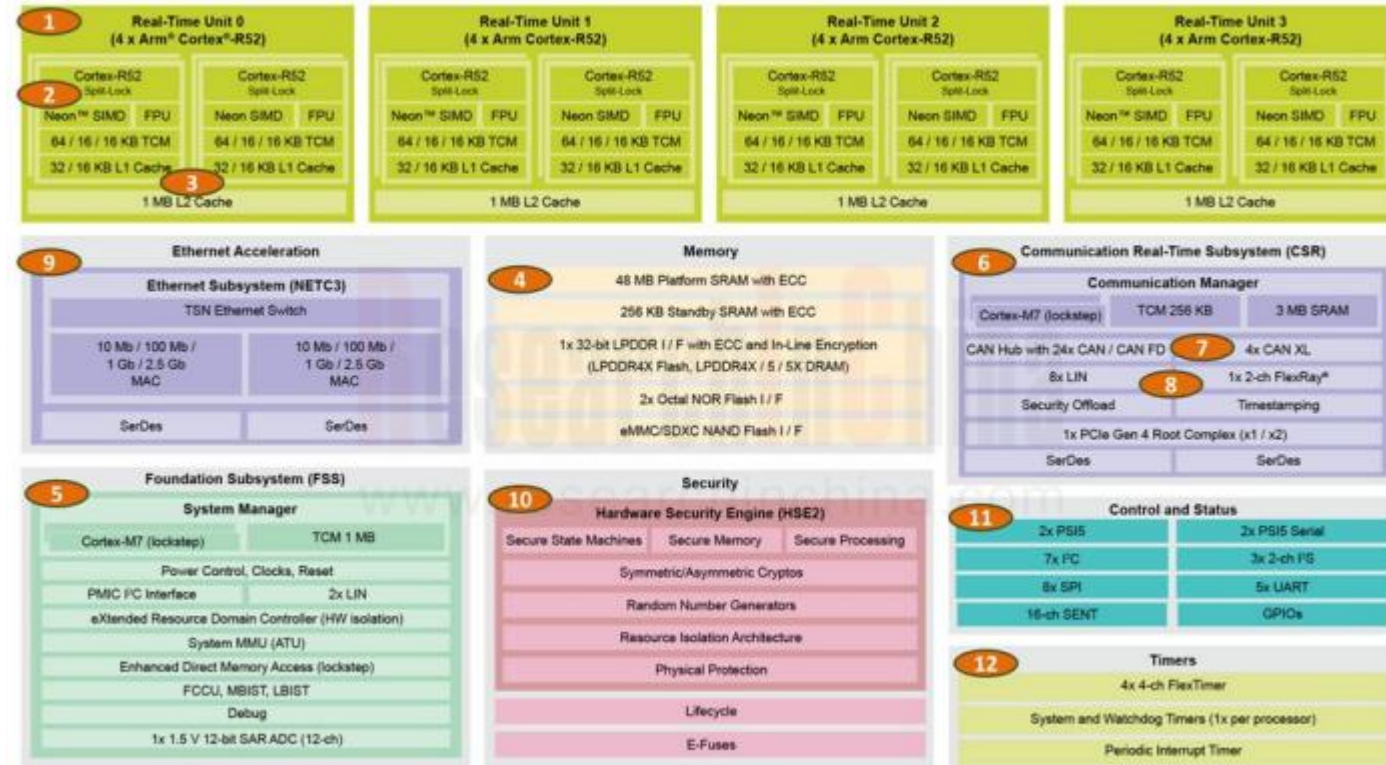
- Provide functionality for the vehicle zone
  - Switch for IP devices and backbone
  - Gateway for legacy devices (LIN, CAN, ...)
  - Power delivery (PoDL, power cables)
  - eSwitch/eFuse functionality
  - Additional computation power capability
- Scalable
  - MCU and application cores
  - eFuse/high side power distribution
  - Switch and gateway port count
  - ASIL levels
- Mechanics
  - Sealed and not sealed according build-in position
  - Small footprint
  - Moderate power dissipation

Source: Visteon

# Some typical solutions under Zonal architecture

## NXP S32N55 Internal Block Diagram

**High-speed communication MCU (NXP):** In March 2024, NXP launched the world's first 5nm automotive MCU, the S32N55, which integrates vehicle dynamic control, body, comfort, and central gateway, and has multiple network interfaces, including CAN, LIN, FlexRay, automotive Ethernet, CAN-FD, CAN-XL, and PCIe, with at least 15 CAN network interfaces.



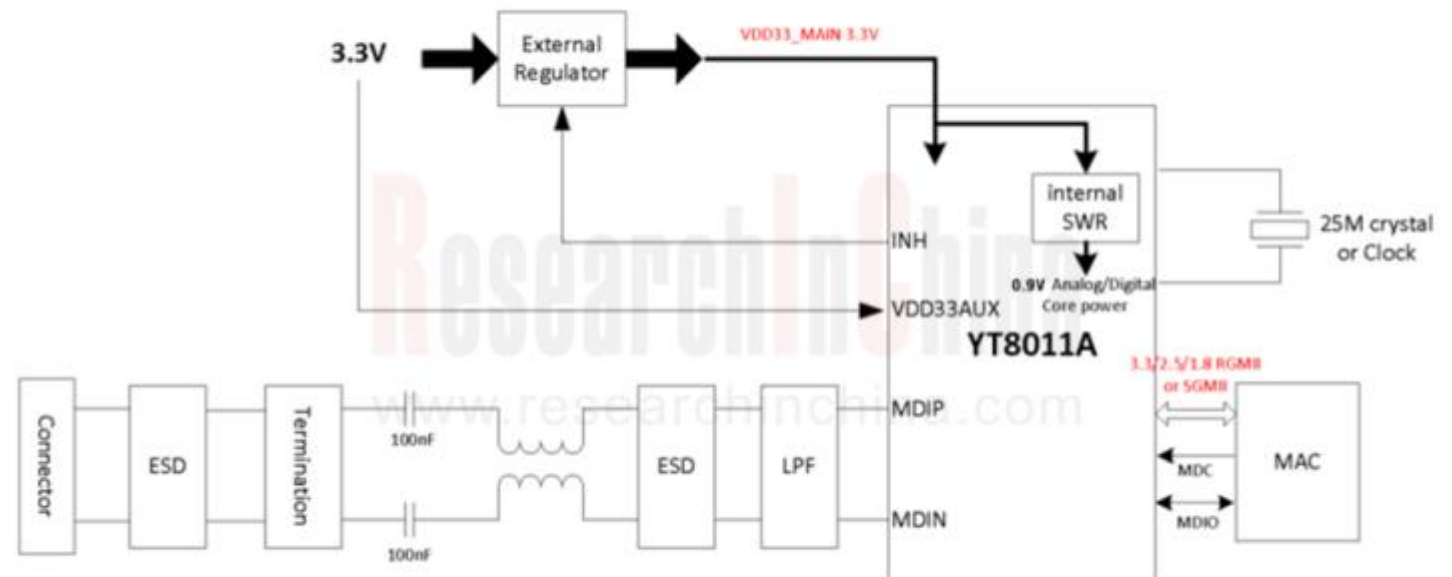
Source: NXP



# Automotive Ethernet PHY chip (Motorcomm)

**Automotive Ethernet PHY chip (Motorcomm):** By the end of 2023, Motorcomm's first Gigabit automotive Ethernet PHY chip product YT8011 was successfully mass-produced and obtained orders from multiple OEMs. The YT8011 series chips are compatible with 100BASE-T1 and 1000BASE-T1, support RGMII/SGMII MAC interface, support EEE energy-saving Ethernet, 1588 time synchronization protocol, IEEE802.1AS time synchronization protocol, and can achieve a transmission distance of more than 60 meters on unshielded twisted pair cables, fully meeting the application requirements of high-speed data transmission such as radar, surround view, and autonomous driving.

## Motorcomm Gigabit Vehicle Ethernet PHY YT8011 Application Block Diagram

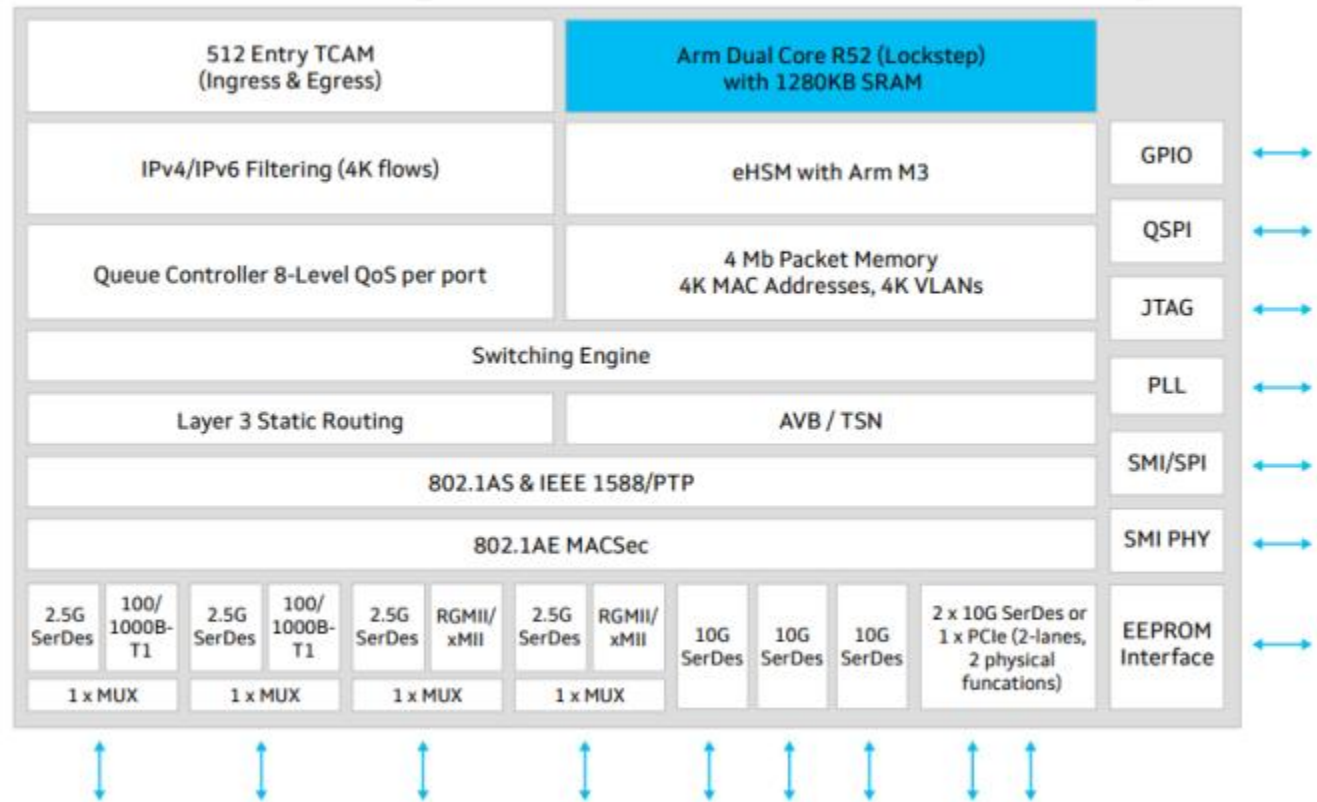


Source: Motorcomm

# Automotive Ethernet switch chip (Marvell)

**Automotive Ethernet switch chip (Marvell):** Marvell's central automotive Ethernet switch series Brightlane Q622x includes two products, Q6222 and Q6223, which are specially designed for automotive Zonal architecture. Among them, Q6223 has a bandwidth of 90 Gbps, which is almost twice the capacity of currently available automotive switches; Q6222 contains nine 60 Gbps ports, including five 10G SerDes ports, four 2.5G SerDes ports and two 1000Base-T1 PHYs to choose from. This zonal switch aggregates the traffic from devices in physical area of ??the car and connects to central computing switch through high-speed Ethernet to achieve information interaction.

**Marvell Central Automotive Ethernet Switch Q6222 Block Diagram**

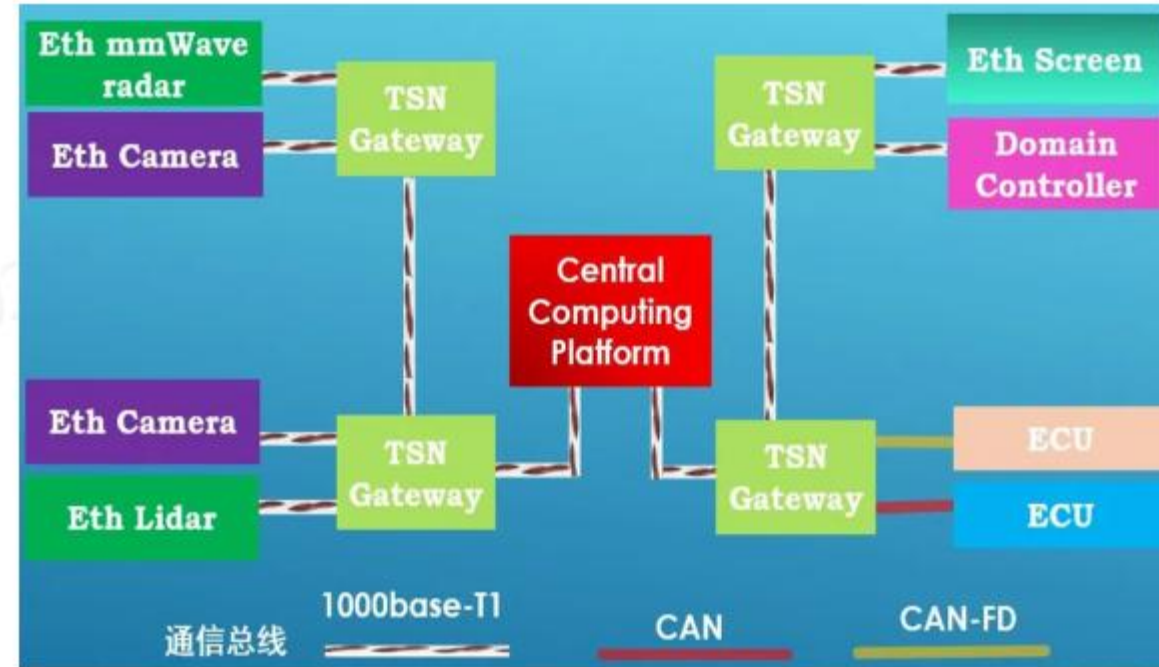


Source: Marvell

# Hinge Tech has designed a zonal gateway architecture based on automotive Ethernet as the backbone network

**Hinge Tech has designed a zonal gateway architecture based on automotive Ethernet as the backbone network:** after the sensor collects data, it is transmitted to corresponding TSN zonal gateway through automotive Ethernet for data exchange. Zonal gateway then transmits corresponding data to the central computing platform via automotive Ethernet bus for calculation and processing. After central computing platform calculates and processes the data, it is transmitted to the domain controller through TSN gateway for decision or automotive Ethernet display (Eth Screen) for display. Meanwhile, TSN zonal gateway is compatible with CAN/CAN-FD communication, and exchanges information with corresponding CAN ECU through the CAN bus and CAN-FD bus.

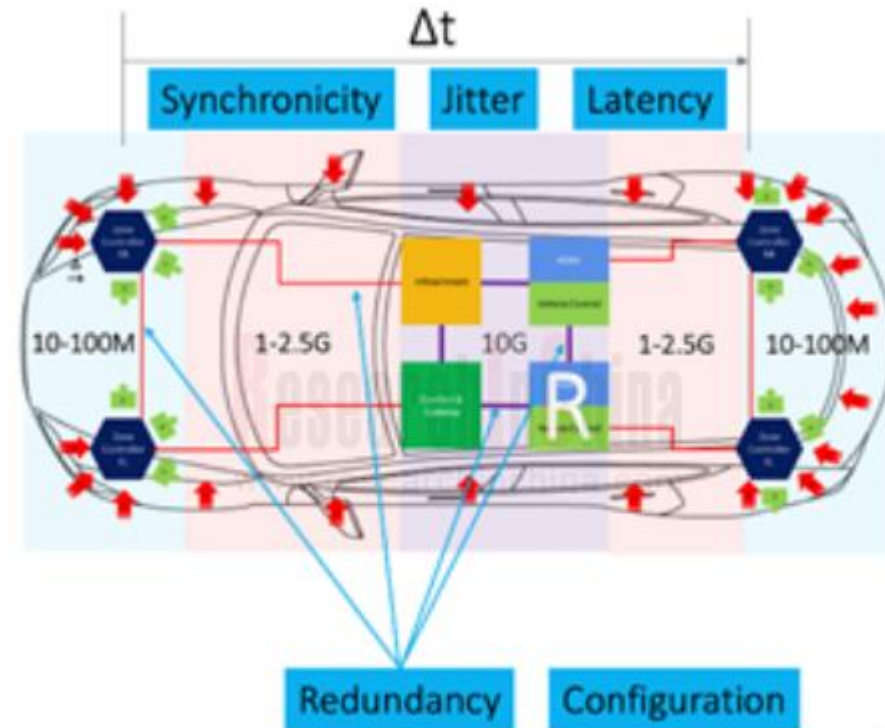
**Zonal Gateway Architecture Based on Automotive Ethernet as Backbone**



Source: Hinge Tech

# 10G+ automotive Ethernet may become the data backbone link in Zonal architecture

In the future, considering the demand for data transmission in autonomous driving and requirements for functional safety in the vehicle, the large amount of data transmission migration between central and zonal controllers, and the interaction of software algorithms, 10G+ automotive Ethernet may become the data backbone link in Zonal architecture.



Source: Polelink Information

# Inter-chip interconnection becomes the key to communication in HPC central computing platform

## Inter-chip interconnection becomes the key to communication in HPC central computing platform

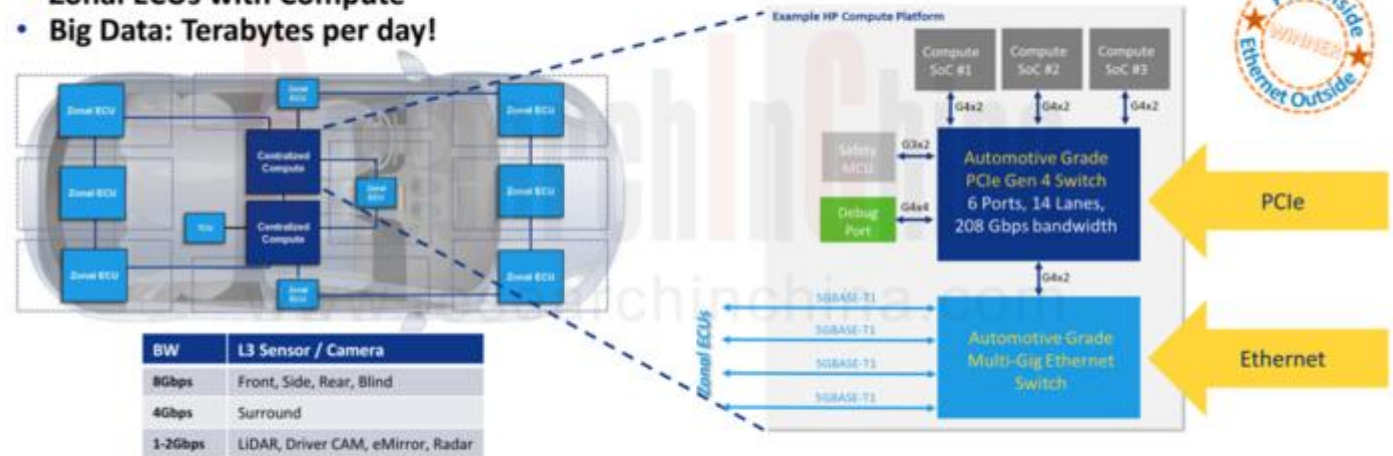
Central computing platform is the core part of Zonal architecture. Since all systems that require a certain scale of computing resources, such as intelligent driving, intelligent cockpit, and vehicle control, will be concentrated in a central computing unit, multiple processors or SoCs will be used, which puts high demands on the computing power, interface, data security, functional safety and many other aspects of central computing platform's hardware architecture. The central computing platform is a heterogeneous chip integrated design of CPU+GPU, and communication technologies such as inter-board interconnection, inter-chip interconnection, and on-chip interconnection are key. Therefore, under Zonal architecture, automotive network also faces an important challenge, which is the high-performance computing interconnection of central computing platform itself.

In heterogeneous computing architecture, GPU and CPU are usually connected together through PCIe bus to work together. Currently, there are two major automotive-grade PCIe switch manufacturers on the market, one is Microchip, which focuses on mid-to-high-end products, and the other is PERICOM, which was acquired by Renesas and focuses on the low-end market and does not support NTB.

HPC internals in the Zonal architecture will use PCIe bus connections

## HPC & ADAS Drive need for PCIe switching

- Zonal ECUs with Compute
- Big Data: Terabytes per day!



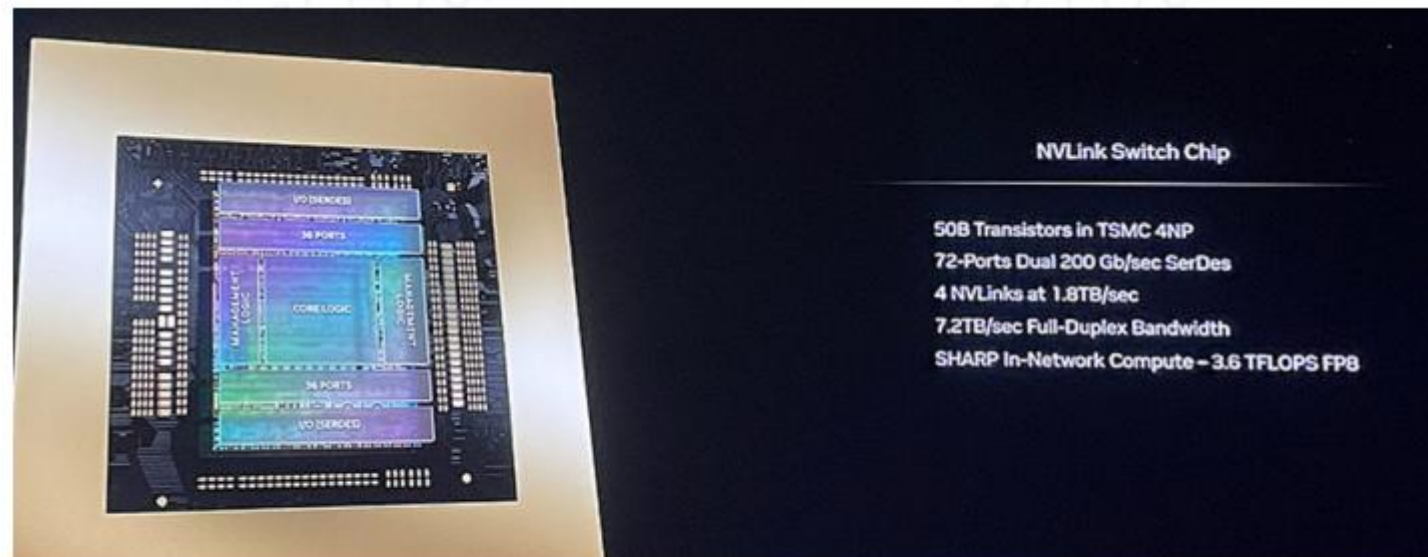
- Zonal ECUs: 10Mbps to 10+Gbps Ethernet in-vehicle network
- Central Compute: >>100Gbps inter-processor PCIe switching

Source: Microchip

# NVIDIA launched NVLink technology

During foundation model training, the full potential of high-end graphics card clusters depends on whether each GPU in the GPU server cluster can communicate quickly and smoothly. In a multi-GPU system, the bandwidth of inter-GPU communication is usually above hundreds of GB/s. Data transmission rate of PCIe bus can easily become a bottleneck, and the serial-to-parallel conversion of PCIe link interface will produce a large delay, affecting efficiency and performance of GPU parallel computing.

Thus, NVIDIA launched NVLink technology that can improve communication between GPUs. NVLink is used in SoCs, and the in-vehicle computing platform NVIDIA DRIVE Thor integrates many intelligent functions such as digital dashboard panel, in-vehicle infotainment, autonomous driving, parking, etc. into a single architecture. In March 2024, NVIDIA launched the fifth-generation NVLink, with a total bandwidth of up to 1.8 TB/s, which is more than 14 times that of PCIe 5.0. A single NVLink Switch chip has 50 billion transistors and supports seamless high-speed communication between up to 576 GPUs, which is suitable for complex large language models.

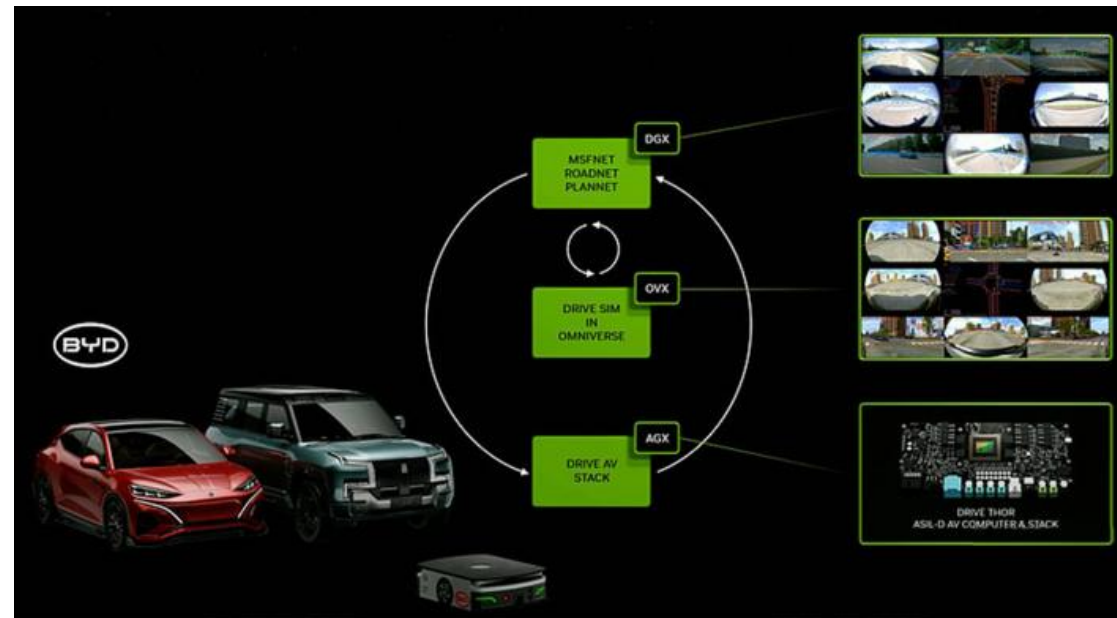


Source: NVIDIA

# NVIDIA Blackwell

NVIDIA Blackwell architecture is based on the fifth-generation NVLink technology and is designed for Transformer, Large Language Model (LLM) and generative AI workloads. It can be divided into B200 and GB200 product series. The GB200 GPU integrates one Grace CPU and two B200 GPUs. Compared with the H100 Tensor Core GPU with NVLink 4, the GB200 NVL72 can provide 30 times the performance improvement for Large Language Model (LLM) inference loads, and reduce the cost and energy consumption of building and running real-time generative AI large language models on trillions of parameters to one-twenty-fifth of the previous level.

In March 2024, NVIDIA announced an expansion of its cooperation with BYD. BYD's future electric vehicles will be equipped with NVIDIA's next-generation autonomous vehicle processor DRIVE Thor using the Blackwell architecture. DRIVE Thor is expected to start mass production as early as 2025, with a performance of up to 1000 TFLOPS. In addition, BYD will also use NVIDIA's AI infrastructure for autonomous driving model training, and smart factory robots will also use the NVIDIA Isaac robot system.



Source: NVIDIA

# Table of Content (1)

## 1 Automotive Communication Network Architecture

- Summary (1)
- Summary (2)
- Summary (3)
- 1.1 Automotive Network Communication BUS
  - 1.1.1 Automotive Communication Technology can be Classified into Wireless and Wired Communication
  - 1.1.2 Automotive Communication Technology 1: In-vehicle Bus Communication
  - 1.1.3 Different Buses Provide Different Functions for In-vehicle Communication
  - 1.1.4 Typical Technical Characteristics of In-vehicle Communication Buses
  - 1.1.5 Comparison of In-vehicle Communication Bus Technologies
  - 1.1.6 Automotive Communication Technology 2: In-vehicle Wireless Communication
  - 1.1.7 In-vehicle Wireless Communication Application Scenarios
  - 1.1.8 Application Requirements of In-vehicle Wireless Communication
  - 1.1.9 Application Requirements of Out-of-Vehicle Wireless Communication
  - 1.1.10 Development Trends of Automotive Communication Technology
- 1.2 OEMs' Network Architecture
  - 1.2.1 Huawei: CC Architecture Communication Topology
  - 1.2.2 Huawei: Vehicle Network Architecture of AITO M9 (1)
  - 1.2.3 Huawei: Vehicle Network Architecture of AITO M9 (2)
  - 1.2.4 Huawei: Vehicle Network Architecture of AITO M9 (3)
  - 1.2.5 Huawei: Vehicle Network Architecture of AITO M9 (4)
  - 1.2.6 Huawei: Vehicle Network Architecture of AITO M9 (5)
  - 1.2.7 Huawei: Vehicle Network Architecture of AITO M9 (6)
  - 1.2.8 NIO: Next-generation Automotive Network Communication Architecture
  - 1.2.8 NIO: Zonal Architecture Progress - 2023 ES8's Network Topology
  - 1.2.10 XPeng Motors: Automotive Network Communication Architecture Development Route
  - 1.2.11 XPeng Motors: Network Topology of XPeng G6
  - 1.2.12 Li Auto: Next-generation Automotive Network Communication Architecture
  - 1.2.13 Li Auto: LEEA3.0 Communication Architecture
  - 1.2.14 BYD: Zonal Architecture Utilizes Gigabit Dual Ethernet Ring Networks
  - 1.2.15 BYD: Comparison of Dolphin and Han's Vehicle Network Architecture
  - 1.2.16 BYD: Overall Interface and Interaction of Dolphin Left Body Domain Controller
  - 1.2.17 BYD: Latest Architecture Progress - 2023 Denza DM9 Network Topology
  - 1.2.18 Changan: Avatr 11 Vehicle Network Architecture
  - 1.2.19 Great Wall Motor: In-vehicle Communication in the 4th Generation E/E Architecture
  - 1.2.20 Great Wall Motor: Backbone Network in Next-generation Architecture to Realize Information Transmission via Automotive Ethernet
  - 1.2.21 Volkswagen: Network Architecture for ICAS1 and ICAS3
  - 1.2.22 Volkswagen: Network architecture for ICAS1 Body control
  - 1.2.23 Tesla: Model 3 Introduces Automotive Ethernet
  - 1.2.24 Volvo: Zonal Architecture Communication Network
  - 1.2.25 Volvo: Communication Design in SPA Architecture
  - 1.2.26 Volvo: Body Electronics Communication Network Architecture
  - 1.2.27 Volvo: Communication Architecture Design for Body Control CEM Module
  - 1.2.28 SAIC: Quasi-Central Computing Platform Galaxy 3.0 Architecture Communication Networks
  - 1.2.29 SAIC: IM LS6 Vehicle Network Architecture
  - 1.2.30 Audi: In-vehicle Network Communication Architecture for Audi A6
- 1.3 Communication Requirements in Zonal Architecture
  - 1.3.1 Automotive E/E Architecture Evolution Trends
  - 1.3.2 Communication Requirements in Zonal Architecture (1): Backbone Communication
  - 1.3.3 Communication Requirements in Zonal Architecture (2): Local Low-Speed



# Table of Content (2)

Applications	
1.3.4 Communication Requirements in Zonal Architecture (3)	
1.3.5 Communication Requirements in Zonal Architecture (4)	
1.3.6 Communication Requirements in Zonal Architecture (5)	
1.3.7 Communication Requirements in Zonal Architecture (6)	
1.3.8 Communication Requirements in Zonal Architecture (7)	
1.3.9 Communication Requirements in Zonal Architecture (8)	
1.3.10 Communication Requirements in Zonal Architecture (9)	
1.4 How to Build Communication Architecture with Zonal Architecture Evolution?	
1.4.1 Automotive E/E Architecture Evolution Route and Current Status	
1.4.2 Vehicle Communication Network Construction under Functional Domain Architecture	
1.4.3 Case of Building Cross-domain Integrated In-vehicle Communication Networks (1)	1.4.14 Zonal Architecture Evolution Drives Demand for PCIe SSD Storage
1.4.4 Case of Building Cross-domain Integrated In-vehicle Communication Networks (2)	1.4.15 Centralized Automotive Storage Solution for Zonal Architecture
1.4.5 Case of Building Cross-domain Integrated In-vehicle Communication Networks (3)	1.4.16 Communication Network Construction for Central Computing Platform under Zonal Architecture (3)
1.4.6 Demand for Communication Middleware in Cross-domain Integration	1.4.17 Communication Network Construction for Central Computing Platform under Zonal Architecture (4)
1.4.7 Communication Middleware Towards Harmonization in Cross-domain Integration Trend	1.4.18 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (1)
1.4.8 Communication Middleware Solutions for Cross-domain Integration	1.4.19 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (2)
1.4.9 Software Case for Cross-domain Integration (1)	1.4.20 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (3)
1.4.10 Software Case for Cross-domain Integration (2)	1.4.21 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (4)
1.4.11 Software Case for Cross-domain Integration (3)	1.4.22 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (5)
1.4.12 Software Case for Cross-domain Integration (4)	1.4.23 In-vehicle Communication Network Construction of ZCU under Zonal Architecture (6)
1.4.13 Communication Network Construction for Central Computing Platform under Zonal Architecture	1.4.24 Gateway Construction under Zonal Architecture (1)
	1.4.25 Gateway Construction under Zonal Architecture (2)
	1.4.26 Gateway Construction under Zonal Architecture (3)
	1.4.27 Case of Zonal Ring Network Architecture
	1.4.28 Network Security Challenges in Zonal Architecture
	1.4.29 Network Security Solutions for Ethernet Applications under Zonal Architecture
	1.4.30 Network Security Solutions for Zonal Architecture
	<b>2 In-car Backbone and Local Network Communication</b>
	2.1 In-car Bus Network Communication Standards & Protocols
	2.1.1 Classification of Automotive Bus Communication Network Protocols

# Table of Content (3)

- 2.1.2 Development of Automotive Bus Specifications
- 2.1.3 List of In-car Bus Communication Standards/Specifications
- 2.1.4 Conventional Bus Communication Protocols (1): CAN Communication
- 2.1.5 Two ISO International Standards and Physical Layer Formats for CAN Buses
- 2.1.6 OSI Protocol Framework for Conventional CAN Bus Networks
- 2.1.7 Conventional CAN Bus Communication: Physical Layer Differences between Low-Speed CAN and High-Speed CAN
- 2.1.8 CAN-FD Communication Framework
- 2.1.9 Technical Specifications and Standardization of CAN XL
- 2.1.10 CAN-XL OSI Protocol Framework
  
- 2.1.11 Four Major Global Automotive Ethernet Standardization Organizations and their Division of Labor (1)
- 2.1.12 Four Major Global Automotive Ethernet Standardization Organizations and their Division of Labor (2)
- 2.1.13 Automotive Ethernet OSI Models
- 2.1.14 Automotive Ethernet Communication Network Protocol Clusters
- 2.1.15 Automotive Ethernet Physical Layer Standards
- 2.1.16 Automotive Ethernet Interface Types
- 2.1.17 Automotive Ethernet Data Link Layer Protocols
- 2.1.18 Automotive Ethernet Data Link Layer Protocols - AVB Protocol Cluster
- 2.1.19 Automotive Ethernet Data Link Layer Protocols - TSN Protocol Cluster
- 2.1.20 Automotive Ethernet Network Layer Protocols
- 2.1.21 Automotive Ethernet Transport Layer Protocols
- 2.1.22 Automotive Ethernet Application Layer Protocols
  
- 2.2 Automotive Backbone Network Communication - 100M/1000M Ethernet
- 2.2.1 Automotive Backbone Network Communications Shift to Automotive Ethernet
- 2.2.1.1 Automotive Communication Backbone Network Shifting from CAN to

- Automotive Ethernet
- 2.2.1.2 Deployment Stages of Automotive Ethernet in Vehicles
- 2.2.1.3 Mainstream Architecture of Automotive Backbone Networks
- 2.2.1.4 Automotive Ethernet Communication Architecture
- 2.2.1.5 Automotive Ethernet Interface Composition
- 2.2.1.6 Working Principle of Automotive Ethernet Interface
- 2.2.1.7 Automotive Ethernet Chip Applications in Vehicles
- 2.2.2 Automotive Ethernet PHY Chip Market Patterns & Product Lists
- 2.2.2.1 Automotive Ethernet PHY Chip Exists as a Standalone Chip
- 2.2.2.2 Key Technical Parameters of Automotive Ethernet PHY Chips
- 2.2.2.3 Global Automotive Ethernet PHY Chip Market Competitive Patterns
- 2.2.2.4 List and Product Selection of Foreign Automotive Ethernet PHY Chip Vendors (1)
- 2.2.2.5 List and Product Selection of Foreign Automotive Ethernet PHY Chip Vendors (2)
- 2.2.2.6 List and Product Selection of Foreign Automotive Ethernet PHY Chip Vendors (3)
- 2.2.2.7 China's Automotive Ethernet PHY Chip Market Competitive Patterns
- 2.2.2.8 List and Product Selection of Chinese Automotive Ethernet PHY Chip Vendors (1)
- 2.2.2.9 List and Product Selection of Chinese Automotive Ethernet PHY Chip Vendors (2)
- 2.2.2.10 Automotive Ethernet PHY Chip Products
- 2.2.3 Automotive Ethernet Switch Chips Market Patterns & Product Lists
- 2.2.3.1 Functions of Automotive Ethernet Switch Chips
- 2.2.3.2 Deployment Location of Automotive Ethernet Switch Chips
- 2.2.3.3 Global Automotive Ethernet Switch Chip Market Competitive Patterns
- 2.2.3.4 List and Product Selection of Foreign Automotive Ethernet Switch Chip Vendors (1)

# Table of Content (4)

- 2.2.3.5 List and Product Selection of Foreign Automotive Ethernet Switch Chip Vendors (2)
- 2.2.3.6 List and Product Selection of Foreign Automotive Ethernet Switch Chip Vendors (3)
- 2.2.3.7 List and Product Selection of Foreign Automotive Ethernet Switch Chip Vendors (4)
- 2.2.3.8 China's Automotive Ethernet Switch Chip Market Competitive Patterns
- 2.2.3.9 List and Product Selection of Chinese Automotive Ethernet Switch Chip Vendors (1)
- 2.2.3.10 List and Product Selection of Chinese Automotive Ethernet Switch Chip Vendors (2)
- 2.2.3.11 List and Product Selection of Chinese Automotive Ethernet Switch Chip Vendors (3)
- 2.2.3.12 Automotive Ethernet Switch Chip Products
- 2.2.4 Development Trends of Automotive Backbone Networks
  - 2.2.4.1 Communication Port Trends
  - 2.2.4.2 Communication Bandwidth Trends
  - 2.2.4.3 10G Automotive Ethernet Solution
  
- 2.3 Automotive Local Network Communication - 10M Ethernet/CAN
  - 2.3.1 CAN-XL/10 BASE-T1S
    - 2.3.1.1 Competition in 10Mbps Field
    - 2.3.1.2 10M Automotive Communication Technology (1): 10BASE-T1S Automotive Ethernet
    - 2.3.1.3 Application Scenarios for 10BASE-T1S Automotive Ethernet
    - 2.3.1.4 Three Typical 10M Ethernet Physical Layer Configurations
    - 2.3.1.5 Characteristic of 10BASE-T1S Automotive Ethernet
  
    - 2.3.1.6 Advantages of 10M Automotive Ethernet
    - 2.3.1.7 10BASE-T1S Implementation Will Eliminate the Need for Gateways in Conventional Networking Technologies
    - 2.3.1.8 List of 10M Automotive Ethernet Chip Vendors and Products
    - 2.3.1.9 10M Automotive Ethernet Chip Products
    - 2.3.1.10 10M Automotive Ethernet Application Trends
    - 2.3.1.11 10M Automotive Communication Technology (2): CAN XL
    - 2.3.1.12 Typical Application Scenarios of CAN XL
    - 2.3.1.13 Parameter Comparison between CAN XL and 10Base-T1S
  - 2.3.2 CAN/CAN-FD/LIN
    - 2.3.2.1 CAN/LIN Transceiver Application Scenarios in Vehicles
    - 2.3.2.2 Automotive CAN/LIN SBC Chips
    - 2.3.2.3 Competitive Pattern of CAN/LIN Interface Chips in Chinese Market
    - 2.3.2.4 Development of Chinese CAN Transceiver Chips
    - 2.3.2.5 List and Product Selection of Foreign CAN/CAN FD/LIN Interface Chip Vendors (1)
    - 2.3.2.6 List and Product Selection of Foreign CAN/CAN FD/LIN Interface Chip Vendors (2)
    - 2.3.2.7 List and Product Selection of Chinese CAN/CAN FD/LIN Interface Chip Vendors (1)
    - 2.3.2.8 List and Product Selection of Chinese CAN/CAN FD/LIN Interface Chip Vendors (2)
    - 2.3.2.9 List and Product Selection of Chinese CAN/CAN FD/LIN Interface Chip Vendors (3)
    - 2.3.2.10 CAN SBC Chip Products
    - 2.3.2.11 CAN Transceiver Application Solutions

- 2.4 Automotive Ethernet Transmission Media - Fiber Optics, POE Cables
  - 2.4.1 Automotive Ethernet Physical Layer Transmission Media
  - 2.4.2 Automotive Ethernet Fiber Optic Communication

# Table of Content (5)

- 2.4.3 Advantages of Automotive Ethernet Fiber Optic Communication
- 2.4.4 Automotive Fiber Optic Communication Solutions (1)
- 2.4.5 Automotive Fiber Optic Communication Solutions (2)
- 2.4.6 Automotive Fiber Optic Communication Solutions (3)
- 2.4.7 What is Power over Ethernet (PoE)?
- 2.4.8 Power over Ethernet (PoE) Cable Block Diagram
- 2.4.9 Automotive Ethernet Standard: Power over Data Line (PoDL) Architecture, Transmitting Data and Providing Power over the Same Differential Channels
- 2.4.10 Power over 10BASE-T1S Ethernet
- 2.4.11 PROCET's Automotive POE Module
- 2.4.12 Automotive Power over Ethernet (PoE) Players
- 2.4.13 ADI's 10BASE-T1S Network Power Solution
- 2.4.14 ADI 10BASE-T1S E2B (Ethernet-Edge Bus) Mass Produced in BMW Cars
- 2.4.15 Tesla Cybertruck Introduces Power over Ethernet (PoE)

## 2.5 Deployment Cases of Automotive Ethernet

- 2.5.1 Deployment Cases of Automotive Ethernet (1)
- 2.5.2 Deployment Cases of Automotive Ethernet (2)
- 2.5.3 Deployment Cases of Automotive Ethernet (3)
- 2.5.4 Deployment Cases of Automotive Ethernet (4)
- 2.5.5 Deployment Cases of Automotive Ethernet (5)
- 2.5.6 Deployment Cases of Automotive Ethernet (6)
- 2.5.7 Deployment Cases of Automotive Ethernet (7)
- 2.5.8 Deployment Cases of Automotive Ethernet (8)

## 2.6 Automotive Ethernet Chip Cost and Market Analysis

- 2.6.1 Automotive Ethernet PHY Chip Price
- 2.6.2 Demand Estimation of Ethernet PHY Chip in ADAS System for Chinese Passenger Cars Market

## 2.6.3 Demand Estimation for Ethernet PHY Chips in IVI Systems for Chinese Passenger Cars Market

## 2.6.4 Market Size of Automotive Ethernet PHY Chips for Passenger Cars in China, 2023-2026E

## 2.6.5 Demand Sides of Automotive Ethernet Switch Chips

## 2.6.6 Automotive Ethernet Switch Chip Price

## 2.6.7 Market Size of Automotive Ethernet Switch Chip in China, 2023-2026E

## 2.7 Automotive Communication Protocol Conversion - Gateway

## 2.7.1 Evolution Trends in Distributed Gateway, Central Gateway, and Ethernet Gateway Topology

## 2.7.2 Gateway Controllers Playing the Role of Automotive Data Servers in Future E/E Architectures

## 2.7.3 Automotive Gateways for Future SOA Architectures (i.e. Zonal)

## 2.7.4 Central Gateways Will Change Automotive Architecture

## 2.7.5 New Service-Oriented Gateway Controllers to Increase Arithmetic Performance Tenfold or More

## 2.7.6 Zonal Gateway Architecture with Automotive Ethernet as the Backbone Network

## 2.7.7 Gateway SoC Controller and Communication Protocols for Automotive Gateways

## 2.7.8 Innovative Next-Generation Gateway Systems Need to Support Various High-Speed I/O (e.g. PCIe Switches)

## 2.7.9 Typical Gateway Processor Products

## 2.7.10 NXP S32G399 Cross-Domain High Performance Gateway Computing Chip

## 2.7.11 SemiDrive's Gateway Chip Product G9H for Next-Generation Cross-Domain Architectures (1)

## 2.7.12 SemiDrive's Gateway Chip Product G9H for Next-Generation Cross-Domain Architectures (2)

## 2.7.13 TI Zonal Architecture (Zonal EEA) Gateway Chip Jacinto DRA821

## 3 Automotive High-speed Video Streaming Transmission Link

# Table of Content (6)

- Summary (1)
- Summary (2)
- Summary (3)
- Summary (4)
- Summary (5)
- Summary (6)
- 3.1 Automotive High-speed Video Transmission Technology - SerDes
  - 3.1.1 Requirements for Automotive High-speed Video Transmission
  - 3.1.2 Automotive High-speed Video Transmission Technology: SerDes
  - 3.1.3 Application of SerDes Chips in Automotive Field
  - 3.1.4 Bandwidth Requirements for Typical Application Scenarios of Automotive SerDes
  - 3.1.5 Automotive SerDes Performance Requirements
  - 3.1.6 Automotive SerDes Transmission Technology
  - 3.1.7 LVDS SerDes HD Video Transmission in Automotive Applications
  - 3.1.8 Technical Challenges of Automotive SerDes
- 3.2 Automotive SerDes Interface Protocols: Public & Private Standards
  - 3.2.1 Protocols for Automotive SerDes are Categorized into Public and Private Standards
  - 3.2.2 Automotive SerDes Private Standard VS Public Standard
- 3.3 Automotive SerDes Public Protocols
  - 3.3.1 Automotive SerDes Alliance
  - 3.3.2 Automotive SerDes Protocol 1: Public Standards
  - 3.3.3 Comparison of Three Major Public Standard Technologies for Automotive SerDes (1)
  - 3.3.4 Comparison of Three Major Public Standard Technologies for Automotive SerDes (2)
  - 3.3.5 New Dynamics in Automotive SerDes Public Standards (1)
  - 3.3.6 New Dynamics in Automotive SerDes Public Standards (2)
  - 3.3.7 MIPI A-PHY
    - 3.3.7.1 Automotive SerDes Public Standard (1): MIPI A-PHY
    - 3.3.7.2 MIPI A-PHY: MASS Common Communication Framework
    - 3.3.7.3 MIPI A-PHY: A-PHY Protocol Layer Architecture
    - 3.3.7.4 MIPI A-PHY: A-PHY Physical Layer Architecture
    - 3.3.7.5 MIPI A-PHY: Physical Interface
    - 3.3.7.6 Core Benefits of MIPI A-PHY Communication Protocol
    - 3.3.7.7 MIPI A-PHY: Automotive Scenarios
    - 3.3.7.8 Two Deployment Phases for Implementing A-PHY Standard in Vehicles
    - 3.3.7.9 MIPI A-PHY Ecosystem Development
    - 3.3.7.10 List of MIPI A-PHY Chip Vendors and Products
    - 3.3.7.11 MIPI A-PHY: Collaboration with Valens
    - 3.3.7.12 MIPI A-PHY Chip Products (1): A-PHY Serializer/De-serializer VL77 Series of Velink Microelectronics
    - 3.3.7.13 MIPI A-PHY Chip Products (2): MIPI A-PHY SerDes SC55xx series with One-transmit and Four-receiver of SIMCHIP
    - 3.3.7.14 MIPI A-PHY Chip Products (3): Valens VA7000 Chipset
    - 3.3.7.15 Cost Advantage of Valens VA7000 Chip Solution
    - 3.3.7.16 MIPI A-PHY Chip Solution (1): Haikang's "4-in-1" Camera Module Solution based on Velink Microelectronics A-PHY chip
    - 3.3.7.17 MIPI A-PHY Chip Solution (2): Long-distance Video Transmission Solution based on SIMCHIP SC55xx series
  - 3.3.10 ASA ML
    - 3.3.10.1 Automotive SerDes Public Standard (2): ASA ML
    - 3.3.10.2 ASA ML Specification Characteristics and Applications
    - 3.3.10.3 ASA-ML Chip Vendors and Products List
    - 3.3.10.4 ASA-ML Chip Products (1): Microchip VS77X Chipset

# Table of Content (7)

- 3.3.10.5 ASA-ML chip products (2): Jinglue JH76xx series SerDes chip
- 3.3.11 HSMT
  - 3.3.11.1 Vehicle SerDes Public Standard (3): HSMT
  - 3.3.11.2 HSMT Standard Protocol Stack and Transmission Rate
  - 3.3.11.3 HSMT Chip Products: Norelsys 12G Automotive HSMT-SerDes Chipset
  - 3.3.11.4 HSMT Chip Solution (1): Norelsys' Solution for ADAS Cameras
  - 3.3.11.5 HSMT chip solution (2): Norelsys' Solution for Automotive Display

## 3.4 Vehicle SerDes Private Protocol

- 3.4.1 Vehicle SerDes Protocol II: Private Protocol (1)
- 3.4.2 Vehicle SerDes Protocol II: Private Protocol (2)
- 3.4.3 Comparison of Mainstream Vehicle SerDes Private Protocol Parameters: FPD-LINK III VS GMSL 2
- 3.4.4 GSML (ADI Dominated)
  - 3.4.4.1 Vehicle SerDes Private Standard (1): Development and Performance Comparison of GMSL Technology
  - 3.4.4.2 GMSL Connection Block Diagram
  - 3.4.4.3 Application of GMSL in Automotive Products
  - 3.4.4.4 GMSL-SerDes Chip Products
  - 3.4.4.5 GMSL-SerDes Chip Solution
- 3.4.5 FPD-Link (TI Dominated)
  - 3.4.5.1 Car SerDes Private Standard (2): FPD-Link
  - 3.4.5.2 Typical Applications and Connecting Harnesses of FPD-Link
  - 3.4.5.3 FPD-Link Transmission Channel
  - 3.4.5.4 FPD Link Technical Features
  - 3.4.5.5 FPD-Link Mainstream Application Technology and Products
- 3.4.6 Other Private Standards
  - 3.4.6.1 Car SerDes Private Standard (3): APIX (Inova Promoted)
  - 3.4.6.2 APIX-SerDes Chip Product List

- 3.4.6.3 APIX3-SerDes Chip Products
- 3.4.6.4 Car SerDes Private Standard (4): Clockless link (Roma Promoted)
- 3.4.6.5 Clockless Link-SerDes Chip Solution
- 3.4.6.8 Car SerDes Private Standard (5): AHDL (led by Kang Zhi)
- 3.4.6.9 AHDL-SerDes Chip Mass Production Product List

## 3.5 Integrated Deployment Case - Sensor Side

- 3.5.1 Automotive SerDes Sensor Integration Solution

## 3.6 Integrated Deployment Case - Display Side

- 3.6.1 Automotive SerDes Display Solution
- 3.7 Automotive SerDes Chip Market Size and Competition Landscape
  - 3.7.1 China Automotive SerDes Chip Market Size, 2023-2026E
  - 3.7.2 Global Automotive SerDes Chip Competition Landscape
  - 3.7.3 List of Foreign Automotive SerDes Chip Vendors and Product Selection (1)
  - 3.7.4 List of Foreign Automotive SerDes Chip Vendors and Product Selection (2)
  - 3.7.5 Domestic Replacement of Automotive SerDes Chips
  - 3.7.6 Domestic Automotive SerDes Chip Vendors and Product Selection

## 4 Research on Inter-chip Communication

- 4.1 PCIe
  - 4.1.1 PCIe Uses
  - 4.1.2 PCIe Standard Specification
  - 4.1.3 Next-generation PCIe 7.0 Standard Upgrade Doubles the amount of Available Bandwidth (compared to PCIe 6.0)
  - 4.1.4 PCIe Communication Architecture
  - 4.1.5 PCIe Switch is perfect for in-car networks in AI era
  - 4.1.6 Growing Demand for PCIe switches Under Future EEA
  - 4.1.7 Next Generation Automotive EEA, PCIe Switch Will Become Core
  - 4.1.8 Evolution of Automotive EEA, Application of PCIe Switch

# Table of Content (8)

- 4.2 NVLink
  - 4.2.1 NVLink Technical Background
  - 4.2.2 NVLink Technical Specifications
  - 4.2.3 5th generation NVLink
  - 4.2.4 NVLink High Speed Interconnect
  - 4.2.5 NVLink Technology Carrier
  - 4.2.6 Nvidia's GB200 GPU for AI and HPC Applications
  - 4.2.7 BYD will carry NVLink 5-based DRIVE Thor
  - 4.2.8 UALink Promotion Group was Established to Compete with NVLink

## **5 Research on Wireless Communication Inside and Outside Vehicles**

- 5.1 Vehicle Wireless Communication Technology Standards and Specifications
  - 5.1.1 List of Vehicle Wireless Communication Technology Standards
  - 5.1.2 UWB Operating Frequency Bands in major Countries and Regions
  - 5.1.3 Channels used for UWB Frequency support in major Countries and Regions
  - 5.1.4 New National Standard on UWB: Interpretation of the 2024 Edition of Interim Provisions on Radio Management of Ultra-Wideband (UWB) Equipment
  - 5.1.5 UWB Industry Organizations and Alliances
  - 5.1.6 UWB Industry Standards and Technical Specifications
  - 5.1.7 Relationship between Fira Technical Specifications and IEEE Standards
  - 5.1.8 Advantage of UWB is Ranging and Positioning
  - 5.1.9 Vehicle Application Scenarios of UWB
  - 5.1.10 NearLink Alliance
  - 5.1.11 NearLink End-to-end Standard System
  - 5.1.12 NearLink Technology 1.0 Standard Architecture
  - 5.1.13 NearLink Technology 1.0 Standard: Access layer - SLB, SLE Access Technology
  - 5.1.14 NearLink Technology 2.0 Standard
  - 5.1.15 Commercialization of NearLink Technology

- 5.2 Research on Main Application Scenarios of Wireless Communication Inside and Outside Vehicle
  - 5.2.1 Digital Keys
    - 5.2.1.1 Technical Standard of Digital Keys
    - 5.2.1.2 Ecological Structure, Functional Classification and Development of Digital Key
    - 5.2.1.3 Technological Development Path of Digital Key
    - 5.2.1.4 UWB Digital Keys
    - 5.2.1.5 Digital Key Chip Products
    - 5.2.1.6 Digital Key Solution
  - 5.2.2 C-V2X
    - 5.2.2.1 China C-V2X Standard Construction Progress
    - 5.2.2.2 Message Sets Corresponding to Different Standard Stages of C-V2X
    - 5.2.2.3 2023-2024 C-V2X Latest Communication Standard
    - 5.2.2.4 LTE-V2X to 5G NR-V2X
    - 5.2.2.5 Three Features of 5G R17 Standard
    - 5.2.2.6 Next-generation Standard R18 has a greater Impact on V2X
    - 5.2.2.7 5GAA large-scale Deployment of C-V2X Communication Technology Roadmap
    - 5.2.2.8 C-V2X Communication Architecture
    - 5.2.2.9 Communication Interface used by C-V2X
    - 5.2.2.10 C-V2X Wireless Air Interface
    - 5.2.2.11 Construction Guide on Telematics Cyber Security and Data Security Standard System
    - 5.2.2.12 MIIT to Develop Six New V2X Standards
    - 5.2.2.13 Vehicle Cloud Integrated Communication Protocol
  - 5.2.3 Vehicle Cloud Interaction
    - 5.2.3.1 COVESA Connected Vehicle Systems Alliance
    - 5.2.3.2 Member of COVESA Alliance
    - 5.2.3.3 VSS Specification: Common Vehicle Data Access Protocol and Standard Interface

5.2.3.4 VSS Specification Focuses on Vehicle Data and Cloud Interaction

## **6 (Application Scenarios) Communication Research**

6.1 Intelligent driving Scenario Communication

6.1.1 Autonomous Driving has significantly Improved Performance, Computing Power and Speed Requirements of Automotive Communication Networks

6.1.2 Typical Communication Connections in Autonomous Driving Systems

6.1.3 Autonomous Driving Domain Controller Peripheral Communication

6.1.4 Intelligent Driving Domain Controller Hardware Architecture Case

6.1.5 Intelligent Driving Domain Control Communication Case (1)

6.1.6 Intelligent Driving Domain Control Communication Case (2)

6.1.7 Intelligent Driving Domain Control Communication Case (3)

6.1.8 Intelligent Driving Domain Control Communication Case (4)

6.1.9 Cockpit-Parking Integrated Domain Control Communication Case

6.2 Intelligent Cockpit Scenario Communication

6.2.1 Communication Connection Mode of Intelligent Cockpit Hardware Platform under Central Computing Architecture

6.2.2 Cockpit High Speed Video Transmission Solution (1)

6.2.3 Cockpit High Speed Video Transmission Solution (2)

6.2.4 Cockpit High-speed Video Transmission Application Case

6.2.5 Smart Cockpit Domain Control Communication Case (1)

6.2.6 Smart Cockpit Domain Control Communication Case (2)

6.2.7 Smart Cockpit Domain Control Communication Case (3)

6.3 Vehicle Control Domain Communication

6.3.1 Basic Functions of in-vehicle BMS

6.3.2 Vehicle BMS Communication Requirements

6.3.3 Wired BMS Communication

6.3.4 Wired BMS Topology

6.3.5 BMS Wired Communication Solutions

6.3.6 Wireless BMS Communication

6.3.7 Wireless BMS Communication Topology and Evolution Trend (1)

6.3.8 Wireless BMS Communication Topology and Evolution Trend (2)

6.3.9 Communication Metrics of wBMS

6.3.10 BMS Wired Communication VS wBMS Wireless Communication

6.3.11 Advantages of Wireless BMS

6.3.12 Vehicle Control Domain Communication Case

## **7 Research on Foreign Automotive Communication Chip Enterprises**

7.1 Marvell

7.1.1 Business History

7.1.2 Business and Revenue

7.1.3 Automotive Business Layout

7.1.4 Automotive Ethernet PHY Chip Products Roadmap

7.1.5 Automotive Ethernet Switch Chip Product Route

7.1.6 Multi-Gigabit Ethernet Camera Bridge Solution

7.1.7 Automotive Ethernet Switch Chip Solutions

7.1.8 Automotive Ethernet Switch Chip Case

7.2 NXP

7.2.1 Vehicle Network Business Layout and Revenue

7.2.2 Manufacturing Plants

7.2.3 Customer Base Analysis

7.2.4 CAN Transceiver Product Line

7.2.5 CAN Transceiver Selection Features

7.2.6 CAN FD Transceiver Products

7.2.7 FlexRay Transceiver Line



# Table of Content (10)

- 7.2.8 Automotive Ethernet PHY Chip Products Line
- 7.2.9 Automotive Ethernet Switch Chip Product Line
- 7.2.10 Ethernet Switch Chip Solution
- 7.2.11 Typical Application of Vehicle Ethernet Chip
- 7.2.12 Four Typical Applications of NXP SJA1105
- 7.2.14 NXP 100BASE-T1 Ethernet PHY TJA1101 Product Block Diagram and Technical Features
- 7.3 Broadcom
  - 7.3.1 Pioneer of Automotive Ethernet
  - 7.3.2 Vehicle Ethernet Physical Layer BroadR-Reach Technology
  - 7.3.3 Automotive Ethernet Switch Chip Product Line
  - 7.3.4 Automotive Ethernet Switch Chip Products
  - 7.3.5 Automotive Ethernet PHY Chip Products
  - 7.3.6 Automotive Ethernet PHY Chip Products
- 7.4 Microchip
  - 7.4.1 Automotive Communication Product Layout
  - 7.4.2 Automotive Communication Field Dynamics
  - 7.4.3 Automotive Ethernet PHY Chip Product Line
  - 7.4.4 Automotive Ethernet PHY Chip Products
  - 7.4.5 Microchip Vehicle Communication Solution
- 7.5 TI
  - 7.5.1 Automotive Market Revenue and Automotive Communication Product Layout
  - 7.5.2 Global Manufacturing Base Layout
  - 7.5.3 Automotive CAN Transceiver Product Line
  - 7.5.4 Automotive Ethernet PHY Chip Products
  - 7.5.5 Automotive Communication Chip Products
  - 7.5.6 Automotive Ethernet Chip Products
  - 7.5.7 DP83TG720S-Q1 Ethernet PHY System Framework and Technical Features
  - 7.5.8 Automotive SerDes Chip (FPD-LINK Serial/Deserializer) Product Line

- 7.5.9 FPD Link Serial/De-Serial Chip Architecture (1)
- 7.5.10 FPD Link Serial/De-Serial Chip Architecture (2)
- 7.5.11 FPD-Link IV Application Route
- 7.6 ADI
  - 7.6.1 GMSL Technology Development (1)
  - 7.6.2 GMSL Technology Development (2)
  - 7.6.3 GMSL Serializer/Deserializer Product Line
- 7.7 ROHM
  - 7.7.1 CAN/LIN Transceiver Line
  - 7.7.2 SerDes IC
  - 7.7.3 Product Line and Features of SerDes IC for Automotive Camera Modules
  - 7.7.4 Product Line and Features of SerDes IC for Automotive Multi-screen Displays
  - 7.7.5 Automotive SerDes IC Product Features and Advantages
  - 7.7.6 Automotive SerDes Chip Solution in ADAS Camera

## **8 Research on Domestic Vehicle Communication Chip Enterprises**

- 8.1 Rsemi
  - 8.1.1 Automotive Serdes Chip Products
  - 8.1.2 Core Competencies of Rsemi R-linC chips
  - 8.1.4 R-linC Product Development Route of Automotive SerDes Chip
  - 8.1.5 Application of Automotive Serdes Chip R-linC
  - 8.1.6 Automotive SerDes Chip Solution
- 8.2 Motorcomm
  - 8.2.1 Automotive Chip Product Development and Layout
  - 8.2.2 Research Projects in the Field of Vehicle Communication
  - 8.2.3 Automotive Wired Communication Chip Products
  - 8.2.4 Automotive Ethernet PHY Chip Solution (1)
  - 8.2.5 Automotive Ethernet PHY Chip Solution (2)

# Table of Content (11)

- 8.2.6 Comparison between Motorcomm 100M Automotive Ethernet PHY Chip and International Competitors
- 8.2.7 Comparison between Motorcomm Gigabit Automotive Ethernet PHY Chip and International Competitors
- 8.2.8 Vehicle Ethernet PHY Chip Per-car Value and Cost Analysis
- 8.3 JLSemi
  - 8.3.1 Automotive Communication Chip Product Line
  - 8.3.2 Core Technology of Automotive Communication Chip
  - 8.3.3 Automotive Ethernet PHY Chip Solution
  - 8.3.4 Automotive SerDes Chip Solution
- 8.4 Realtek
  - 8.4.1 Automotive Chip Product Layout
  - 8.4.2 Automotive Communication Chip Product Line
  - 8.4.3 Automotive Ethernet Solutions
  - 8.4.4 RTL9047AA-VC Car Ethernet Switch
- 8.5 SIT
  - 8.5.1 Development Route of LIN Transceiver Chip
  - 8.5.2 Development Route of CAN Transceiver Chip
  - 8.5.3 Typical Automotive CAN/CAN FD Application Solution (1)
  - 8.5.4 Typical Automotive CAN/CAN FD Application Solution (2)
  - 8.5.5 LIN Transceiver Solutions
- 8.6 Guoke Tianxun
  - 8.6.1 Automotive Communication Product Layout
  - 8.6.2 Automotive Ethernet TSN Switch Chip Product Line
  - 8.6.3 Automotive Communication Chip Solution (1)

- 8.6.4 Automotive Communication Chip Solution (2)
- 8.6.5 Automotive TSN Switch Chip Application Case
- 8.7 Beijing Neuron Network Technology Co., Ltd.
  - 8.7.1 Automotive Communication Product Layout
  - 8.7.2 Automotive Ethernet TSN Switch Chip Product Line
  - 8.7.3 AUTBUS Chip Product Line
  - 8.7.4 Automotive Communication Technology
  - 8.7.5 Automotive Ethernet Chip Solution (1)
  - 8.7.6 Automotive Ethernet Chip Solution (2)
- 8.8 Kungao Micro
  - 8.8.1 Automotive Communication Chip Product Layout
  - 8.8.2 Automotive Ethernet Chip Solution
- 8.9 Ingenic
  - 8.9.1 Automotive Communication Chip Product Line
  - 8.9.2 Chip Production Process
  - 8.9.3 Automotive Network Transmission Solution (1)
  - 8.9.4 Automotive Network Transmission Solution (2)
  - 8.9.5 Automotive Network Transmission Solution (3)



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