



THINK TANK

# #VEHICLES7YFN

**THE PRESENT AND THE FUTURE OF THE MOBILITY IN EUROPE:**  
AUTONOMOUS, CONNECTED VEHICLES AND SUSTAINABLE MOBILITY

Ameti<sup>ic</sup>

**2<sup>nd</sup> EDITION**

**2025 SCENARIOS ON AUTONOMOUS VEHICLES IN EUROPE  
MOBILITY, URBAN INFRASTRUCTURE AND SOCIAL IMPACT IMPLICATIONS**

**Strategic Reflection Meeting**

**20-21<sup>st</sup> June 2019 BILBAO**



**#VEHICLES7YFN**

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# 1. PRESENTATION



Dear all,

AMETIC, the representative organization of the electronic and digital technology sector in Spain, and a recognized expert in digital transformation, engages on a continuous basis with key stakeholders at the national and European level.

Given the accelerated transformation of the mobility sector due to technological, environmental and societal developments, it is our role to design new mechanisms for collaborating that can bridge the public-private divide, cut-across spatial scales (local, national and global), and convene a range of sectoral actors (OEM, energy, transport, infrastructure, insurance, digital and telecom).

Thus, came the idea of creating a Think Tank in 2018 to gather leading actors across Europe to explore the present and the future of mobility in Europe, focusing on Autonomous, Connected Vehicles and Sustainable Mobility.

The uncertain and fast-paced nature of change in our world renders impossible to try to predict the future; nevertheless, we need more than ever to have future-oriented dialogues built on structured approaches that integrate complexity and uncertainty. This is the rationale for our choice to develop Scenarios, using the Oxford Scenario Planning Approach, with design, methodological support and facilitation by NormannPartners.

On our first iteration of the Think Tank, where **72 senior executives and experts from 55 organizations** gathered, we focused on building scenarios for the future of Autonomous Vehicles in Europe.

Our main goal is to engage braver conversations, challenge common assumptions, better make sense of disruptive change, rethink strategy and uncover opportunities. We aim to foster dialogue and enhance participants' resilience by bringing to the fore what if? questions.

Nevertheless we consider last year's edition was solely the first step in a productive and very enriching journey towards the future of the mobility sector in Europe. Therefore, we would love to have you during the **2019 edition** where we will explore implications and opportunities of the **2025 scenarios on autonomous vehicles in Europe for mobility, urban infrastructure and social impacts**.

**Pedro Mier,**  
President of AMETIC



## 2. INTRO



The transport sector is on the cusp of a profound transformation due the confluence of several technological trends including autonomous and electric vehicles, renewable and decentralized energy, connectivity and artificial intelligence. The interaction of these trends will shape not only what and how we drive, but the configuration of production systems, the design of urban environments, and choices around where people live and work.

Navigating these fast-evolving trends and uncertainties require new mechanisms for collaborating that can bridge the public-private divide, cut-across spatial scales (local, national and global), and convene a range of sectoral actors (OEM, energy, transport, infrastructure, insurance, insurance, digital and telecom).

This is the purpose of **#Vehicles7YFN** is a Think Tank that explores the present and the future of mobility in Europe focusing on Autonomous, Connected Vehicles and Sustainable Mobility convened by **AMETIC**, the representative organization of the electronic and digital technology sector in Spain, and a recognized expert in digital transformation, and methodological support from **NormannPartners**, gathering leading European actors in the mobility space.

The 2018 iteration of the **#Vehicles7YFN** focused on Futures of Autonomous Vehicles in Europe.



We invite you to read and take advantage of the Brochure **[2025 Scenarios on Autonomous Vehicles in Europe](#)** issued from the 2018 Think Tank iteration.

# 3. GOALS



**#Vehicles 7YFN** is a group of leading stakeholders capable of influencing the sector dynamics in Europe.

**#Vehicles 7YFN** is a private forum that fosters sharing and dialogue on the common challenges of sustainable mobility, ecosystems and co-design of future value-creating systems.

**#Vehicles 7YFN** members develop future plausible scenarios, anticipating drivers of change and enabling members to reframe their strategies, identify innovation opportunities and mitigate risks.

**#Vehicles 7YFN** creates an environment conducive to serendipitous encounters where new relationships and partnerships can be identified and courses of action explored.

# 4. METHODOLOGY

## OXFORD SCENARIO PLANNING APPROACH



Even if it is impossible to predict how mobility in Europe will look in 2025 from a societal, political or technological perspective, we can create plausible future scenarios enabling us to focus our thinking, sharpen our strategies and inform our decision-making.

**Scenarios are a set of plausible and challenging stories and systems of the plausible future context one might inhabit.**

### Why?

- Increasingly, the context of several organizations and their long-term investments is becoming **turbulent, uncertain, novel** and **ambiguous**. This **'TUNA'** Environment poses significant opportunities and **challenges**.
- **Scenario planning enables organizations to better engage with this TUNA context** re-perceive changes in its context; to surface, question, and challenge its strategic assumptions; to better prepare for plausible and significant new contexts; and to inform the development of innovative value-creating systems.

**#Vehicles7YFN** is supported by NormannPartners, a London and Stockholm partner-owned firm with 15 years' experience of scenario-based strategy and technology. It designed the Think Tank methodological process and facilitated the Think Tank meetings based on the Oxford Scenario Planning and Networked Strategy Approaches.

# 4. METHODOLOGY

## OXFORD SCENARIO PLANNING APPROACH



Research



Interviews /  
Surveys



Work groups



Participant  
roles



Presentations



Debates

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Findings / Conclusions



2019 Final Report



2018 Scenarios





# 5. ROADMAP

## 2019 THINK TANK ITERATION



### A. March - June 2019 (online)

- Scope definition, sponsors and partners
- Research & Interviews
- Participant selection
- Design definition of the program schedule and election of the experts and guest international start-ups

### B. June 2019 - BILBAO Forum

- Think Tank & networking session
- Scenario affirmation & implications workshops
- B2B meetings with international start-ups (from Europe and Israel)



### D. November (Barcelona Forum)

- Design of innovative offerings & business models
- Matchmaking with Barcelona innovation ecosystem
- Institutional prize for a start-up or international Project

### C. July - September (online)

- Rehearsing outcomes of Bilbao Forum
- Final Report presentation (Santander)

## 2nd Edition: Bilbao Forum (20-21st June)

### Day 1

#### Stage I

Scenario affirmation

Introducing the Oxford Scenario Planning Approach (OSPA). Participants will review, internalise and assess the scenario set making sure is relevant and challenging.

Deliverable:  
**Affirmation of Scenario Set**

#### Stage II

Mapping Ecosystems

Mapping the current (e.g. mobility, energy) ecosystems in which participants find themselves, specifying inter-actors, offerings and co-created values. Emphasis will be given to the role of digital actors and start-ups role in value co-creation and offerings enabled by emergent technologies.

Deliverable:  
**Mobility x Digital Ecosystems**

### Day 2

#### Stage III

Designing reconfigured ecosystems

Designing plausible future ecosystems, exploring how value-creating systems might develop in each scenario and across scenarios. We Will invite participants to be attentive to the roles and values co-created by multiple stakeholders.

Deliverable:  
**Future European Mobility x Digital Ecosystems**

#### Stage IV

Collaborative strategy and implications

Assessment of threats and opportunities, as viewed through collaborative strategy lenses, explore how Think Tank members could lead the ecosystem reconfiguration, derive policy implications and outline an agenda for AMETIC's interaction with key stakeholders at the Spanish and European level.

Deliverable:  
**Opportunities, Threats, Implications**

# 6. TOPICS

## MOBILITY, URBAN INFRASTRUCTURE AND SOCIAL IMPACT



### Urban planning

- Urban Transport Infrastructure
- Logistics, transport and mobility (passengers, goods and services)
- Public services
- Emergencies and disaster recovery
- Social inclusion



### IoT / 5G Communications

- IoT infrastructure and communications
- V2V technology
- 5G connectivity



### Software, AI & BigData

- Operational Systems and IoT compatibility
- Artificial Intelligence
- Big Data storage, processing and analytics
- Cybersecurity
- Virtual and augmented reality



### Regulatory environment

- Autonomous vehicle
- Electronics, communications and software
- Programmes and aid (innovative public purchases)
- Data processing and privacy
- Emerging Risks & Liability



### Business models

- As a Service business models
- Integral energy services
- Insurance
- Logistics and distribution
- Car sharing and renting
- IoT electronics



### Sustainable households

- Self-consumption and self-generating power
- Power storage
- Smart home and building solutions

# 7. MEMBERS 2019



The Think Tank shall be composed of **50/60 participants**, representing **key private, public, research and civil society actors in the mobility ecosystem** at an **European level**.

- 25% C-Level (CEO, CTO, CIO, etc.) with an active role in the strategic planning process of the company.
- 25% Sector experts.
- 25% Researchers and academics from technological centers or Think Tanks of geo-strategy.
- 25% Visionaries in the implementation phase of a new business model related to connectivity, autonomous mobility and sustainability.

The meeting will be conducted in English under the **Chatham House Rule**.

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## Industry players in the mobility ecosystem:

- Automotive OEMs
- Energy services
- Oil & Gas
- Petrochemistry
- Telecom
- Legal
- Insurance and Financial Services
- Connected home
- Software, Cloud, Big Data, AI, Communications
- Business Models
- Cities & Regions
- Governmental agencies
- Research Centers
- Clusters
- Infrastructure operators
- Automotive Tier-1
- Electric Infrastructure
- Urban Planning
- National Trade Associations
- European Associations
- Standards Associations

## Public, Research, Agencies & Associations

# 8. MEMBERS, 2018

55 organizations, 72 participants



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Accenture	CIC Energigune	Gestamp	Porsche
Aedive	CIE Automotive	i2Cat	Premo
AMETIC	CTTC Centre Tecnològic	Iberdrola	Repsol
Arealcontrol GmbH	Daimler	Ikusi	Simon
Asti Robotics	eMobil Baden-Wuerttemberg	ITU Organization	Spanish Ministry of Industry
Attrack GmbH	Ente Vasco Energía	Kapsch	Star Cooperation
Automotive Intelligence Center	ESA European Space Agency	Lightyear	Start-up Autobahn
Bilbao Council	ETSI Organization	Naturgy	Stuttgart Region
Bilbao Metropoli	Eurecat	Nokia	SwarmLogistics
Bizkaia Government	Fair Fleet 230	Normann Partners	Tecnia
Bombardier	Ferrovial	Oracle	Velatia
Borgware	Ferrovial-Cintra	Orkestra	Whitehole
Bridgestone	Fundación ONCE	Ormazabal	Willis Towers Wattson
Cabify	Gertek	Petronor	

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# 9. AGENDA

BILBAO FORUM, 20-21st JUNE 2019



## 1<sup>st</sup>. Day

### Objectives:

- Presentation of Think Tank and objectives of the Bilbao meeting.
- Scenarios affirmation and mapping ecosystems

- 08:30 – 09:00 Welcome and registration ([Palacio Euskalduna](#))
- 09:00 – 09:30 Presentations: Institutions and partners
- 09:30 – 10:30 Introduction of the Think Tank and Oxford Methodology
- 10:30 – 11:00 Break
- 11:00 – 12:30 Stage 1: Scenario affirmation
- 12:30 – 14:00 Networking lunch
- 14:00 – 16:30 Stage 2: Mapping Ecosystems
- 16:30 – 17:30 Guest speaker
- 17:30 – 18:00 Discussions
- 20:30 – 21:30 Welcome dinner ([Yandiola restaurant](#))
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## 2<sup>nd</sup> Day

### Objectives:

- Designing ecosystems, strategy and implications
- Matchmaking between members and special guests

- 08:30 – 09:00 Bilbao downtown to [Automotive Intelligence Center \(AIC\)](#)
- 09:00 – 09:30 Guided Visit AIC
- 09:30 – 10:00 Break
- 10:00 - 12:30 Stage 3: Designing reconfigured ecosystems
- 12:30 – 14:00 Networking lunch
- 14:00 – 15:30 Stage 4: Collaborative strategy and implications
- 15:30 – 16:00 Feedback & Conclusion
- 16:30 Return to Bilbao downtown/Bilbao airport

# 10. VENUES

## BILBAO FORUM, JUNE 20TH – 21ST



### Hotels

### June, 20th

### June, 21st

### Restaurants

#### Hotel Meliá Bilbao

Leizaola Lehendakariaren  
Kalea, 29, 48009 Bilbao



#### Hotel Silken Indautxu

Plaza del Bombero Etxaniz,  
s/n, 48010 Bilbao, BI



#### Hotel ILUNION Bilbao

Rodríguez Arias Kalea, 66,  
48013 Bilbao, Bizkaia



#### Palacio Euskalduna

Avda. Abandoibarra, 4 ·  
48011, Bilbao



[Website](#)

#### Automotive Intelligence Center

Barrio Gumuzio, S/N  
48340 Boroa



[Website](#)

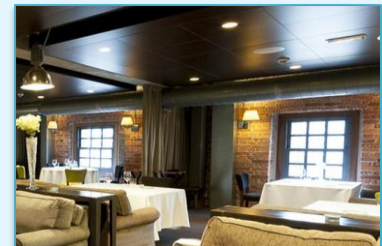
#### Restaurante Jaureguía

Avda. Abandoibarra, 4  
48011 Bilbao



#### Restaurante Yandiola

Plaza Arrikibar, 4,  
48010 Bilbao



# 11. OUTCOMES



#7YFN 2019

- Assess implications of 2025 AV Scenarios for mobility urban infrastructure and social impacts
- Map 'Mobility X Digital' Ecosystems
- Design Future European 'Mobility X Digital' Ecosystems
- Identify Opportunities, Threats, Policy Implications

**Annually**, all the expertise and shared know how will be set out in a final report, with a triple purpose.

- Outline challenges and updates to the Scenario set on the future of mobility;
- Indicate how scenarios can be used as an input for the participants' strategic planning processes
- Enumerate implications for collaborative strategy and innovation processes.



Institutional prize for the development of a start-up or international Project in the. mobility field.  
(Jury: Members, partners, AMETIC and recognized professionals)



# 12. SPONSORSHIPS



	MAIN PARTNER	PARTNER	ASSOCIATE
Participation in the Bilbao meeting, networking and visibility in AMETIC communication	●	●	●
Access to preparatory research, documentation & collaborative platform	●	●	
Executive Summary and Final Report	●	●	
Program design, 1:1 meetings with start-ups, key actors & facilitators, call for start-ups	●		
Participation in round-table and conference events organized and/or supported by AMETIC in 2019	●		
	€ 20.000 € 16.000*	€10.000 € 8.000*	€6.000 €5.000*

\*Price only available for **AMETIC** members

# 13. NORMANN PARTNERS

## TEAM



**NormannPartners**, as a partner-owned firm with 15 years' experience of scenario-based strategy and technology work, will have a driving and facilitator role during the meeting, and guide the Think Tank process. Several colleagues of the organization are former members of Shell's scenarios team, and the professionals involved in this assignment represent 60+ years' combined experience in the fields of strategy, innovation and scenario planning.



### **Dr. Jonas Hoffmann - Engagement Lead**

Jonas is a Principal at NormannPartners. He is an expert in innovation and strategy, and has worked in Europe, the US, China, and Brazil. He has been advising clients, in the construction, mobility, energy and premium fields, since 2002. Clients include AMETIC, AngloAmerican, Inter-American Development Bank, LafargeHolcim, Orascom and Schneider Electric. Jonas is Associate Professor at SKEMA Business School (France/China) and was Academic Visitor at the Saïd Business School, University of Oxford, which led to his co-authoring a paper on scenario planning with Rafael Ramirez that appeared in the Summer 2017 issue of the MIT Sloan Management Review. Jonas holds a Doctorate from Université Grenoble Alpes in France and lives in the south of France.



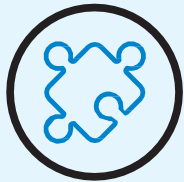
### **John Clift - Engagement Consultant**

John was an Executive Director of Technology at The Walt Disney Company International. In his 30+ year career as a technologist he worked on computing infrastructure, networks and communications, accounting systems, supply chain systems, business intelligence solutions and data science. He has worked in most Western European countries, and in Russia, Mexico, Japan, Singapore and North America and has run projects which delivered solutions into other international territories. In his later years at Disney he was a senior member of the Strategic Foresight team which instituted scenario planning techniques across the international business. He facilitated Strategic Foresight sessions for Disney's European leadership team, healthy living business and data technology group. John is a trustee of the White Swan charity. He lives near Cambridge in the UK.

# 14. AMETIC



**Who are we?** We are the business Organization that represents the electronics and digital technology industry in Spain. Our partners are companies of all sizes including large IT, Telecom, Electronics, Digital Services & Content multinational corporations.



**Our vision.** A society that benefits from the opportunities that nowadays the digital technology offers in Spain, regarding this sector as the main engine for the achievement of the economic and social objectives.



**Our mission.** To promote, to the benefit of our partners, the best economic policy and regulatory environment for the development and use of the digital technologies. We intend to achieve this goal by working as constructive partners with national and European public and private institutions, as well as with other international organizations.



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