



THINK TANK

#VEHICLES7YFN

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

Ameti^{ic}

IN PARTNERSHIP WITH:



*Wirtschaftsförderung
Region Stuttgart*

Strategic Reflection Meeting

28th - 29th November 2018

Stuttgart



#VEHICLES7YFN

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1. INTRO



The transport sector is on the cusp of profound transformation due to the confluence of several technological trends, including self-driving vehicles, renewable and decentralized energy, connectivity and artificial intelligence. The interaction of these trends, still incipient, may develop along multiple different pathways, and will definitely shape the configuration of everything around us. Navigating these fast-evolving trends and uncertainties will 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 (energy, transport, infrastructure and IT).

Since most of these technologies are incipient, they may develop along multiple different pathways. For example, charging stations for electric vehicles may depend on power from the grid or have their own localised renewable electricity generation, as recently intimated by Tesla founder Elon Musk. Rapid developments in wireless transmission of electricity could dramatically alter the operating model for electric vehicles and boost their appeal. The emergence of future mobility solutions, as well as transport usage and ownership patterns, will depend as much on innovations in software that leverage IoT as on hard technology and physical infrastructure. On the energy side, the rise of electric drives is pushing numerous developments in energy infrastructure and equipment, as DC energy is favoured over AC for fast recharging and as decentralized energy production units grow at a fast pace. Other types of sustainable vehicles such as natural gas and hydrogen, will also play a key role in these urban-interurban and public-private mix of uses where these vehicles will be one source of energy/information in broader ecosystems of interconnected assets, infrastructures and technologies.

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#Vehicles7YFN is an annual meeting that explores the latest trends involved in the development of self-driving autonomous vehicles and intelligent mobility systems, the basis for a sustainable transport model in Europe. It is organized as a multi-sectorial strategic think tank. Our aim is, through the Oxford Scenario Planning methodology, to generate scenarios that serve to capture the value of the enormous technological, economic and social challenge that comes with the mobility of the future in Europe. The holistic vision also incorporates the main actors in urban planning, legislation, geo-strategy and disruptive technologies at the international level.

AMETIC is the representative organisation of the electronic and digital technology sector in Spain, and a recognised expert in digital transformation, is organizing this event in conjunction with the main actors of the European automotive, energy, telecommunications and financial services industries, with the aim of creating a space of trust that frames the debate, consolidates learning and develop shared scenarios.

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 80+ years' combined experience in the fields of strategy, innovation and scenario planning.

2. GOALS



#Vehicles 7YFN is a Group of influential leading stakeholders capable of determining the sector dynamics in Europe.

#Vehicles 7YFN is a private forum that fosters the generous sharing of the common realities from the different value chains related with the sustainable mobility, their diverse perspectives and future action plans.

#Vehicles 7YFN deeply analyses future scenarios, key factors to maximise in order to achieve desired outcomes for its members and how to mitigate key probable risks.

#Vehicles 7YFN converges in ongoing workgroups where synergistic relationships are established, starting from common interests identified in the foreseen courses of action.

“If you and I each have an apple and we exchange our apples, we will still have just one apple each. But if you and I each have an idea, and we exchange our ideas, we will then have two ideas each.”

2.1 GOALS



- Become the reflection and debate reference event on the autonomous, connected vehicles and sustainable mobility in Europe.
- Create a qualified think-tank with relevant and influential industry profiles, with conversations in a safe environment (free from press and media, and with competitive concerns allayed) to generate valuable insights.
- Share a common vision and experiences of the industry.
- Generate, in a collaborative way, an annual document of scenarios around the autonomous, connected vehicles and sustainable mobility in Europe.
- Provide disruptive content and inspirations about the environment, sustainability and transformation of business models and society.
- Launch a contest and deliver a prize to a Project to be accelerated in an international incubator.

3. METHODOLOGY

OXFORD SCENARIO PLANNING APPROACH



Research



Interviews /
Surveys



Work groups



Participant
roles



Presentations



Debates

Findings /
Conclusions



Annually, final report

4. #VEHICLES7YFN

2018 THINK TANK ITERATION



A. March - June 2018 (online)

- Scope definition
- Research & Interviews
- Participant selection
- Design Definition of the program schedule and election of the experts and guest start-ups

B. June 2018 (Bilbao Forum)

- Think Tank & Networking session
- Exploring Drivers of Change; Mapping Ecosystems; Designing Reconfigured Ecosystems; Collaborative Strategy and Implications.
- Bases of the Call for Awards for Startups

D. November (Stuttgart Forum)

- Matchmaking with local innovation ecosystem
- Building '2025 Scenarios on Autonomous Vehicles'

C. July - November (online)

- Rehearsing outcomes of Bilbao Forum
- Deepening Research Themes
- Engaging with Stuttgart Ecosystem



'2025 Scenarios on Autonomous Vehicles in Europe' Report (January 2019)

5. TOPICS

AUTONOMOUS, CONNECTED VEHICLES AND SUSTAINABLE MOBILITY



Urban planning

- Logistics, transport and mobility (passengers, goods and drones)
- Public services (garbage collection, gardening, etc.)
- 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)
- Potential violations
- Data processing and privacy



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 solutions

6. PARTICIPANTS



The think tank shall be composed of **50 participants**, representing **industry players and public and private agents** in the mobility ecosystem, with proven communication skills and the ability to make evaluative judgements.

- 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**.

Industry players in the mobility ecosystem:

- Automotive OEMs
- Energy services
- Petrochemistry
- Telecom
- Legal
- Insurance services and Financial
- Connected home
- Software, Cloud, Big Data, AI, Communications
- Business Models
- Infrastructure operators
- Automotive Tier-1
- Electric Infrastructure
- Urban Planning

Agents:

- Governmental agencies
- Research Centers
- Clusters
- National Trade Associations
- European Associations
- Standards Associations

7. OUTCOMES

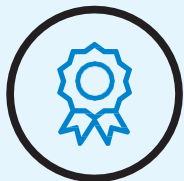


#7YFN 2018

- Lenses of the future (“Scenario snippets”)
- Ecosystem map
- Future European Ecosystem map
- Opportunities, Threats, Policy Implications Identification

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

- Analyze the latest trends and forecasts for the industry
- Collect all the latest updates and opportunities presented in the event
- Develop scenarios as an input for the participants’ strategic planning processes



Institutional prize for the development of a startup in an international business incubator. (Jury members: Platinum Sponsors, Ametic and recognized professionals.)

8. AGENDA

STUTTGART FORUM, NOVEMBER 28TH – 29TH



Wednesday, 28th

Objectives:

- Presentation of Think-Tank and objectives of the Stuttgart meeting.
- Matchmaking with local innovation ecosystem.

- 11:00 – 12:00 Welcome and registration (coffee) [Venue: ARENA 2036](#)
- 12:00 – 13:00 Presentation of Startup Autobahn / ARENA 2036 and guided visit
- 13:00 – 13:30 Presentations of 2-3 Startups in the mobility sector
- 14:00 – 16:00 Finger food & networking. [Venue: Das Gutbrod Lounge](#)
- 16:00 – 16:30 Presentation of the Think Tank and the goals of the Stuttgart meeting. AMETIC
- 16:30 – 17:00 Presentation: Baden-Wuerttemberg transformation scheme, a strategic dialogue with the automotive industry. Mr. Stefan Büchele
- 17:00 – 18:45 Key Note - Tobias Schiller “Designing sustainable urban lifestyles: IBA2027”
- 18:45 – 19:30 Discussions and matchmaking with the local innovation ecosystem
- 19:30 – 21:30 Welcome dinner. [Venue: Schönbuch Brauhaus Restaurant](#) (Think Tank members)

Thursday, 29th

Objectives:

- Report and discussion on scenarios development on ‘Autonomous Vehicles’.
- Outlook of final report.

- 08:00 – 09:00 Introduction to Scenario Planning & Outcomes of Bilbao meeting, Normann Partners. [Venue: Sparkassen Akademie](#)
- 09:00 – 12:00 Building Scenarios (Parallel Sessions)
- 12:00 – 13:00 Lunch
- 13:00 – 15:00 Report and discussion on scenarios development (Plenary)
- 15:00 – 16:00 Conclusion and next steps
- 16:00 – 16:30 Closing

Note: If you arrive on Tuesday evening, we suggest you visit to the local [Christmas Market](#) +Info [here](#)

9. VENUES

STUTTGART FORUM, NOVEMBER 28TH – 29TH



Hotels

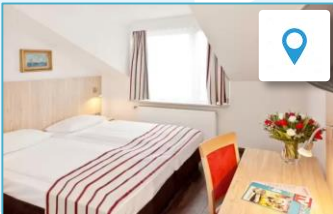
November, 28th

November, 29th

Restaurants

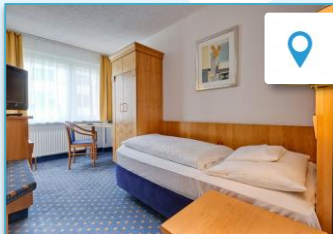
Hotel Hansa (+Info)

Silberburgstr 114-116
70176 Stuttgart (West)



Hotel am Feuersee (+Info)

Johannesstrasse 2,
70176 Stuttgart (West)



Novum Hotel Rieker (+Info)

Friedrichstraße 3,
70174 Stuttgart



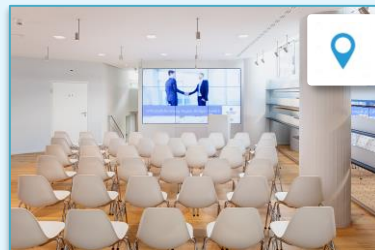
ARENA 2036

Pfaffenwaldring 19
70569 Stuttgart



Das Gutbrod

Friedrichstraße 10,
70174 Stuttgart



Sparkassen Akademie

Pariser Platz 3 A,
70173 Stuttgart

[Website](#)



Das Gutbrod Lounge

Friedrichstraße 10,
70174 Stuttgart



Schönbuch Brauhaus

Bolzstr.10
70173 Stuttgart



10. NORMANN PARTNERS

TEAM



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. 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.



Ciarán McGinley - Senior Consultant

Ciarán is a Senior Associate at NormannPartners. He has 35 years' experience in Intellectual Property and intangible assets. He held a wide range of strategic positions at the European Patent Office (Chef de Cabinet, Comptroller, Board member). During his time at the EPO, he created the Chief Economist function, initiated the OECD working relationship and set-up the acclaimed Scenarios for the Future of Global Patenting. He has extensive experience in working with scenarios since the late 1990's, including collaborations with Shell and Electricité de France. Ciarán holds a BSc (Hons) in Aeronautical Engineering from Bristol University and an MBA from HEC-Paris. Ciarán lives in The Netherlands.

11. AMETIC



Who are we? We are the business Organization that represents the 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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