Drive2Transform Workshops for Regional Transformation Scenarios (January to March 2025)

To assess the current state of transformation readiness, the Drive2Transform consortium first developed a Transformation Readiness Index. Based on the results, nine workshops have been conducted simultaneously across all regions, involving more than 135 participants, to explore future scenarios fitting to the identified challenges. The workshops were structured identically and focused on four key areas: electrification, automation, connectivity, and platform economy.

The workshops took place in:

- Germany (Cluster Mobility & Logistics, TechBase Regensburg GmbH)
- Poland (Silesia Automotive & Advanced Manufacturing (SA&AM) Cluster Katowice Special Economic Zone SA, KSSE)
- Austria (Business Upper Austria - OÖ Wirtschaftsagentur GmbH)
- Slovakia (SEVA – Slovak Electric Vehicle Association)
- Italy (NOI S.p.A)
- Germany (Pforzheim University)
- Czechia (Regional Development Agency of the Pilsen Region, RDAP)
- Slovenia (Chamber of Commerce and Industry of Slovenia, CCIS)
- Hungary (Pannon Business Network Association, PBN)

Key outcomes: Each region developed future transformation scenarios for each of the four key areas and identified critical success factors for their implementation in a transformation canvas. The discussions provided valuable insights into regional challenges and opportunities, setting the foundation for further strategic actions. Business Upper Austria (Biz-Up) led this part of the project, while regional organizations were responsible for implementing the workshops in their respective areas.

What's next? The second regional workshop sessions, scheduled for April and May, will build on these findings to develop a "Transformation-Ready" model company with its potential products and services. The goal is to define:

- The necessary prerequisites for transformation readiness,
- The ideal structural and organizational setup,
- The competencies, technologies, products and services required for successful transformation.

This next step will help create a concrete blueprint for businesses aiming to navigate the transformation effectively.

Germany (Cluster Mobility & Logistics, TechBase Regensburg GmbH):

The workshop in Bavaria took place on February 20 at TechBase Regensburg, with 25 companies and institutions participating. The results indicated that electrification depends on charging infrastructure, government incentives, and CO_2 pricing, with hybrid drives and hydrogen considered as important alternatives to be taken into account for long-term solutions. Automation requires investments in digital infrastructure and political support to establish autonomous mobility. Connectivity remains dependent on regulation and IT security, with V2X technologies playing a crucial role. The platform economy is growing through sharing models but requires clear regulations, digital sovereignty, and demographic inclusion.

Poland (Silesia Automotive & Advanced Manufacturing (SA&AM) Cluster of the Katowice Special Economic Zone SA, KSSE):

The first workshop in Silesia took place on February 7 during the Silesia Automotive & Advanced Manufacturing Programme Councill Meeting and the second workshop on February 11 at Katowice Special Economic Zone Office in Gliwice. In total, there were 35 participants – out of which 16 represented business, 17 BSOs and 2 SA&AM Silver Experts (retired automotive sector experts).

Participants developed a transformation canvas, each for electrification, connectivity and autonomous vehicle. The thematic area of platform economy wasn't covered during

the meetings. According to the insights of the participants OEM plants in the region, as well as Tier 1 suppliers are involved in producing components, systems and vehicles for electric vehicles and autonomous vehicles. Some IT companies are also developing solutions for connectivity. Participants see opportunities in a range of new technologies as part of the automotive hub in the SA&AM ecosystem. Among main challenges are the alignment of the educational offer at universities to the needs for new competencies in automotive, the necessity to ensure compliance with standards concerning cybersecurity in vehicles and production processes, as well as availability of specialised regional suppliers. Notwithstanding the potential in the region, all are aware of the fact that the Automotive industry in the SA&AM ecosystem is much dependent on the evolution of the overall European automotive market.

Austria (Business Upper Austria - OÖ Wirtschaftsagentur GmbH, BIZUP):

The workshop in Upper Austria took place on February 07 in Steyr, with 11 participants. The results indicated that electrification depends on charging infrastructure (incl. fast charging), government incentives, and a hybrid solution with hydrogen is seen as a long-term solution. Automation requires investments in digital infrastructure and political support to establish autonomous mobility – data monopoles will be a problem long-term. In the field of Connectivity IT Security, regulations and the availability of hard- and software components will play a crucial role. Platform economy requires increase in acceptance of the population and a model for proportionate sharing of costs/profits between stakeholders. One bottleneck will be the availability of data and closure of public transportation gaps in the country. Overall, the participants were rather

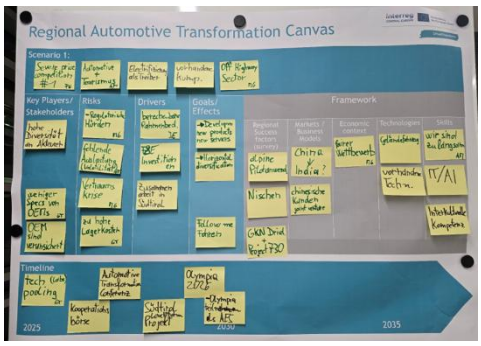
optimistic, if political requirements are met and the public mindset adapts to the change.

Slovakia (SEVA – Slovak Electric Vehicle Association):

The workshop in Slovakia took place on February 19 in SEVA premises in Bratislava in hybrid form – 7 participants in person, 3 online. It shows that all OEMs in Slovakia produce EVs and more models to come in 2025 and 2026. The results indicated that Electrification depends on involving OEMs, TIER1 and research organisations into public-private R&D cooperation. And cooperation with start-ups in the field of new services and technologies as well. Connectivity requires building partnerships between incumbents and new disrupters on the market e.g. VW + Rivian, and cooperation with regional clusters focused on digital services development. The field of Platform economy requires building new business models between existing and new stakeholders (cities, IT companies, transportation, OEMs ...) which would require extensive changes in infrastructure and processes. Overall, the participants have concluded that Slovakia has no strategy on the Government side and misses vision for decoupling sourcing of energy. Not to mention the lack of skilled staff & talents and uncompleted policy to generate skills. Also, they see the change in Government policy towards Russia as a big threat.

Italy (NOI S.p.A):

The first Regional Scenario Building Workshop organized by NOI took place February 22 in the NOI Techpark, Bolzano. NOI managed to convince 10 companies, representative for the regional ecosystem (Large, Medium and Small enterprises, Tier1, Tier2, R&D services suppliers) to physically participate at the workshop, starting at 3pm and ending at 5:15 pm.
In the introduction part the regional interview results were presented and discussed. The participants mentioned that since the interviews July and August the general situation in Automotive Industry got more difficult due to competition from China, pending US taxes and a missing stable EU legal framework.
In the second part relevant trends were discussed and based on them a regional scenario was worked out. The scenario focuses on electrification of vehicles an regional strengths in electric components, off-road mobility, public mobility services for tourism and region. The discussed actions were potential joint midterm R&D projects on the left side of the timeline.

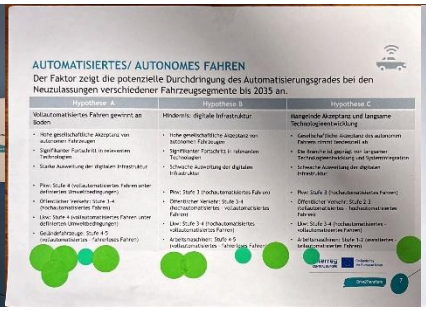


Germany (Pforzheim University):

On January 20, Pforzheim University organized its first Regional Scenario Building Workshop as part of its Open House Day, focusing on the regional automotive industry. The event was led by Prof. Dr. Bernhard Kölmel and Lukas Waidelich (M.Sc.) and took place from 2:00 PM to 5:00 PM. Representatives from eight regional companies, primarily medium and small enterprises, Tier 1 and Tier 2 suppliers, and R&D service providers, participated. Online sessions with representatives from three OEMs further enriched the discussions. Participants analyzed key industry factors and developed scenarios within four thematic areas, identifying major opportunities in electrification, automation, and connectivity. Three main focal points for the CANVAS model were agreed upon:

1. Automated/autonomous driving
2. Charging infrastructure for battery electric vehicles (BEVs)
3. Vehicle-to-vehicle (V2V) and vehicle-to-everything (V2X) connectivity

Overall, participants were highly engaged and recognized the need for industry transformation. However, concerns about shifting regulations, particularly the EU's planned ban on internal combustion engines without alternative fuels by 2035, and political uncertainties are affecting consumer purchasing behavior and the automotive supply chain. Despite these challenges, the workshop highlighted strong commitment to innovation and adaptation within the regional automotive sector.



Czechia (Regional Development Agency of the Pilsen Region, RDAP):

The workshop in the Pilsen Region took place on March 4th at the Regional Development Agency of the Pilsen Region and was attended by 11 stakeholders. The current topic attracted several business support organizations from the region and four relevant companies from the industry. Given the predominant participation of business support organizations, the discussion focused on the economy, platform economy, geopolitical influences, and government incentives and grants for the automotive industry.

Slovenia (Chamber of Commerce and Industry of Slovenia, CCIS):

The workshop in Slovenia took place on January 30th, 2025 at the CCIS headquarters in Ljubljana. It coincided with one of our biggest conferences on best practices, which was a good chance to engage participants to think about the future of industrial production. We gathered 17 companies and organizations to take part and discussed the regional analysis of the automotive industry in the region. The participants discussed the optional factors that might influence the future of the industry and started building scenarios in all 4 thematic areas. The most opportunities were seen in the areas of electrification and automation, especially due to the already intesified shift toward automated technologies and a push for electrification oft he broader EU region. Companies from ICT sector were also positive about the future collaboration synergies that can be found in the areas of connectivity and platform economy, but are worried about the lack of regulation and standardization of new solutions. Participants also

criticised the current regional infrastructure (charging, energy networks, digital), which would not handle the full implementation of the most ambitious scenario.