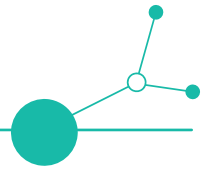


D1.2.1 STAKEHOLDER- BASED SCENARIO REPORTS



Version 1

05 2025





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Document Information

Project Number	CE0200679	Acronym	Drive2Transform
Full Title	Integrative Regional Approaches for the Transformation of the Automotive Industry		
Project URL	https://www.interreg-central.eu/projects/drive2transform/		

Deliverable	Number	D.1.2.1	Title	Stakeholder-based Scenario Reports
Work Package	Number	WP1	Title	ESTABLISHMENT OF TRANSNATIONAL AUTOMOTIVE OPEN TRANSFORMATION PLATFORM

Date of Delivery	Contractual	31.05.2025	Actual	
Status	Final			
Nature	report <input checked="" type="checkbox"/> demonstrator <input type="checkbox"/> other <input type="checkbox"/>			
Dissemination level	Public <input checked="" type="checkbox"/> restricted <input type="checkbox"/>			

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Document History			
Version	Date	Main Modification	Entity
Draft 1	22.05.2025	First Draft	Biz-Up
1st Review		Partners review	Techbase, KSSE, SEVA



1st draft upload		Update of all review comments	
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1. Introduction

1.1. Objective

The objective of A.1.2 and related D.1.2.1 is to validate and complement the findings from A.1.1 by actively involving companies - e.g. through interviews and workshops. This engagement ensures that potential transformative activities are better aligned with the specific needs of businesses.

Based on this, through interaction with companies, as well as leveraging the previously outlined assessment and benchmarking, and the project partners' expertise in the automotive industry within the project regions, targeted potential transformation scenarios are developed in the areas of Electrification, Connectivity, Automation, and Platform Economy - covering short-, mid-, and long-term perspectives.

The scenarios consider aspects such as regional specificities, multidimensional factors (technologies, markets, business models, skills and their interaction), the technological and economic context, as well as the linkage to the four key areas electrification, connectivity, automation, and platform economy.

The scenario building process - regional level:

The aim was to organise two main events in each region - a kick-off workshop and a closing workshop. Additionally, further information was collected through bilateral discussions to support the scenario development.

The workshops were attended by representatives of regional businesses, business support organizations, automotive experts, higher education and research organizations, etc., who were actively involved in the development of the scenarios.

The workshops were structured identically to ensure a comparable output across the regions.

The scenario building process - transnational level:

The aim was to transfer the regional developed scenarios onto a transnational level to create a better understanding for the challenges and opportunities of transformation in the European context. Therefore, the results of the regional workshops were merged to transnational scenarios and put up for discussion at the transnational workshop in Budapest.

The workshop was attended by advisory board members, representatives of businesses, business support providers, automotive experts, universities, and research organizations, as well as other relevant stakeholders from the regions of the project partners. The aim was to gain an international/global perspective.

The objectives of this document are to provide guidelines for the kick-off workshop, closing workshop and the transnational workshop outlining how the workshops should be conducted in each region. This ensures a consistent process, allowing for comparable results.



1.2. Process development

Biz-Up as lead of this activity started the planning process for the workshops already in December 2024. After discussions with specialists inhouse and from project partners a workshop design was developed and proposed to the consortia. After the project partners agreed to the then adapted framework for A1.2. the online methodology training sessions were planned with Bernhard Kölmel from Pforzheim University and Christoph Reiss-Schmidt from Business Upper Austria.

Bernhard Kölmel from Pforzheim University presented McKinsey's 3 Horizons Model for Businesses. Additionally, Christoph Reiss-Schmidt from Business Upper Austria provided insights into Design Thinking, Lego® Serious Play® and the Synergy Diamond Methodology.

At the same time, guidelines for the kick-off workshops were developed and presented to the partners. Those guidelines will be shown in the next section. Based on these guidelines, the workshops were conducted in the regions of the project partners from late January to early March 2025. Due to the standardized structure, the outputs were comparable across all regions.

For the second regional workshop, guidelines were once again developed by the Activity lead and presented to the project partners in February / March 2025 including again a Methodology Training for Persona Building and Lego® Serious Play ®. The results were comparable due to the standardized approach. The workshops took place from early April to mid-May.

For the transnational workshop, the set-up was developed in April 2025 from Biz-Up, Techbase and University Pforzheim in close coordination with PBN, as the workshop was held at the Hungexpo Automotive. The approach for the transnational workshop was similar to the first regional workshops to gain a better understanding of transnational scenarios and use-cases.

Based on the regional scenarios from the kick-off workshops Biz-Up developed transnational scenarios for each topic area (Electrification, Automation, Connectivity, Platform Economy) which were reviewed by the project partners and adapted. The transnational workshop was held on 14th May 2025 as part of Automotive Hungary / Industry Days 2025 in Budapest, incorporating international participants. In the further project activities, the transnational scenarios will be validated by the expert groups and the project consortia to ensure that all insights are considered.

In May 2025, the reports D.1.2.1 and D.1.2.2 were also written and reviewed.

The timeline and activities in A.1.2 can be seen in the following Figure 1:

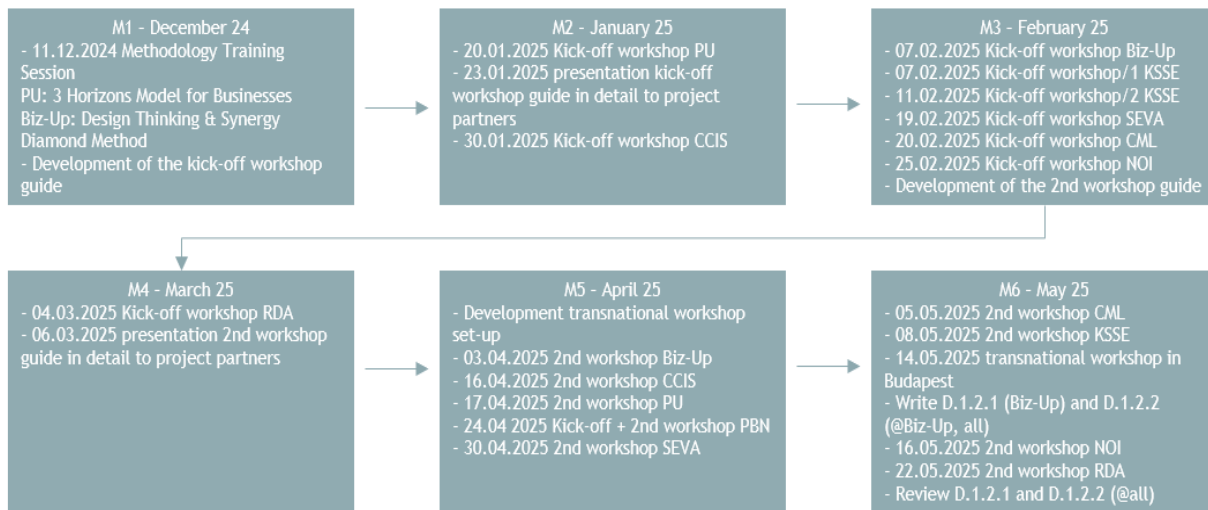


Figure 1 A.1.2 Planning / Timeline

To ensure the quality of the workshops, provide support to the project partners and be able to learn from the previous workshops, it was agreed on to have bi-weekly meetings for A1.2 in period 2. Those can be seen here:

- **December 2024:** Online methodology training session
- **Mid-January 2025:** The guide for kick-off workshop was discussed and finalized.
- **Beginning February 2025:** Lessons learned from the first kick-off workshops were shared.
- **End February / Beginning March 2025:** The guide for the 2nd workshop was presented and further lessons learned from the kick-off workshops were shared.
- **Mid March 2025:** The remaining project partners presented their lessons learned from the kick-off workshops.
- **Beginning April 2025:** Lessons Learned from Biz-Up were shared and guidelines were adjusted / improved as necessary.
- **Mid April 2025:** Further lessons learned were shared and the set-up for the transnational workshop was discussed.
- **Mid May 2025:** Transnational workshop with project partners and external stakeholders in Budapest.

2. Workshops

To ensure the quality of the workshop and the outcomes the project partners were trained on the methodologies for the workshops and the agenda was similar in all regional workshops. It was also agreed to have regular alignment meetings. Those meetings were also used for lessons learned from each workshop which were then already used by the following regional workshops and also for the transnational workshop to ensure high quality of the outcome. In December the preparation for the workshops started and the dates for the regional kick-off workshops were set. If there were missing information for the fulfilment of the required outputs of the kick-off workshop, project partners were free to conduct survey or interviews to finish them accordingly.

As a next step all project partners filled in the Transformation CANVAS templates, provided by Biz-Up. based on the outcomes and delivered the necessary data for the transnational workshop.



The process and training for the second workshop was done in March. As project partners had concerns, that it would be difficult to get enough participants for a full-day workshop, Biz-Up provided another template for a half-day workshop as well. The outcomes of those workshops, held between April and May were again collected in provided templates to ensure the quality.

The last step was the transnational workshop in Budapest, which was based on the outcomes of the regional workshop scenarios. Biz-Up developed the transnational scenarios, checked them with the project partners and they were then again discussed and adapted by the participants. As a last step the deliverable D1.2.2. was written by all project partner, in which the outcomes of the workshops are described.

The overview of the full process can be seen on the following graphic.

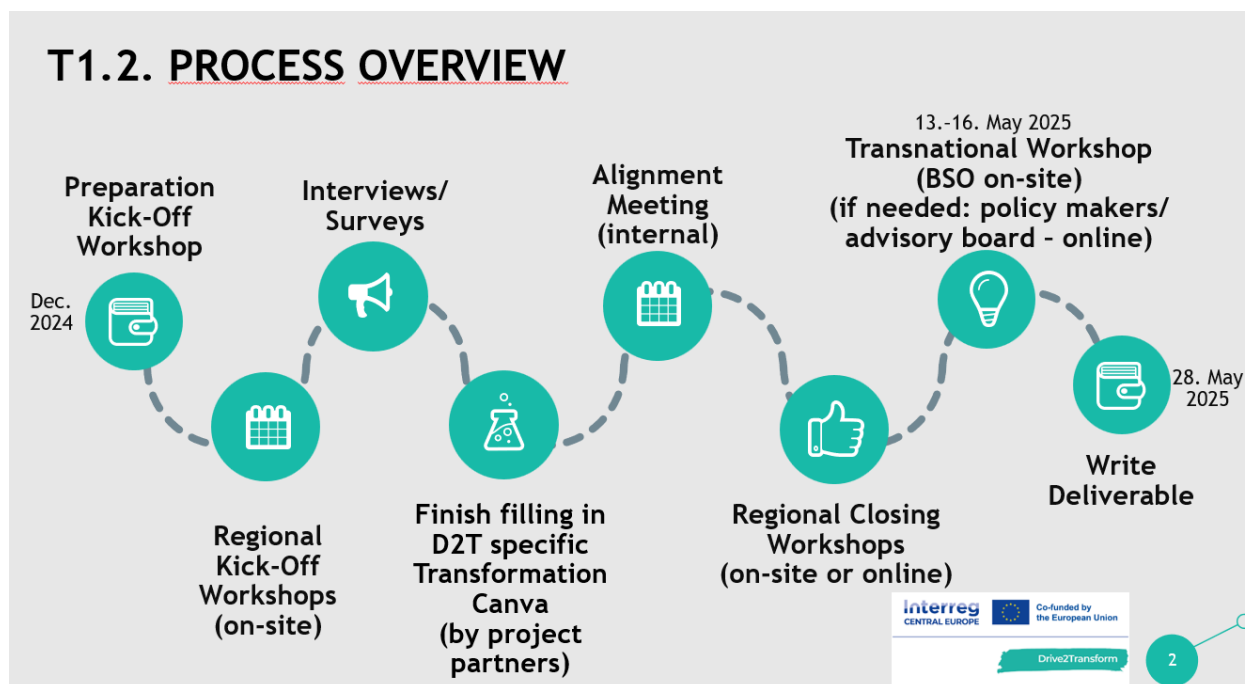


Figure 2 process overview workshops

[OBJ]



[OBJ]

2.1. 1st regional Workshop / Regional Kick-Off Workshop

As previously described, preparations for the regional kick-off workshop already began in December 2024. To ensure a uniform process and make the results comparable, Biz-Up developed a standardized framework for the regional workshops. Together with Christoph Reiss-Schmidt from Biz-Up, an initial workshop design was created. This design was later presented to the project partners. After discussing the design and the respective resources of project partners a unified approach via Business Model Canva and scenario building based on mega trends was chosen. The mega trends are based on an extensive study about the transformation on the automotive industry conducted by Fraunhofer Institute for the Upper Austrian Automotive Industry in 2019. Those identified trends were then adapted by project partners to fit the whole consortia. Each trend resulted also in 3 Assumptions for future scenarios, which were the basis for the scenario building part of the workshop.

As it can be seen in the agenda the participants first choose the most meaningful trends in their perception and then rated them. After the rating participants were rating the assumptions for the trends with the highest rating before. Those assumptions were then used to build up the scenarios.

For the second part of the workshop a Business Model Canvas was developed which also considered the dimensions of the Transformation Readiness Model (TRM) from A1.1 to ensure continuity within the project. The participants then filled in the CANVA for their written scenarios (2035) based on the assumptions.

As this approach was the same in all regions the output of the regional kick-off workshops was the comparable among the different project partners and a trend could be seen. The outcomes of the workshops will be described in D1.2.2.

The draft agenda, developed by Biz-Up and the CANVA used for the workshops, are illustrated in the following graphics:



Figure 3 draft agenda kick-off workshop

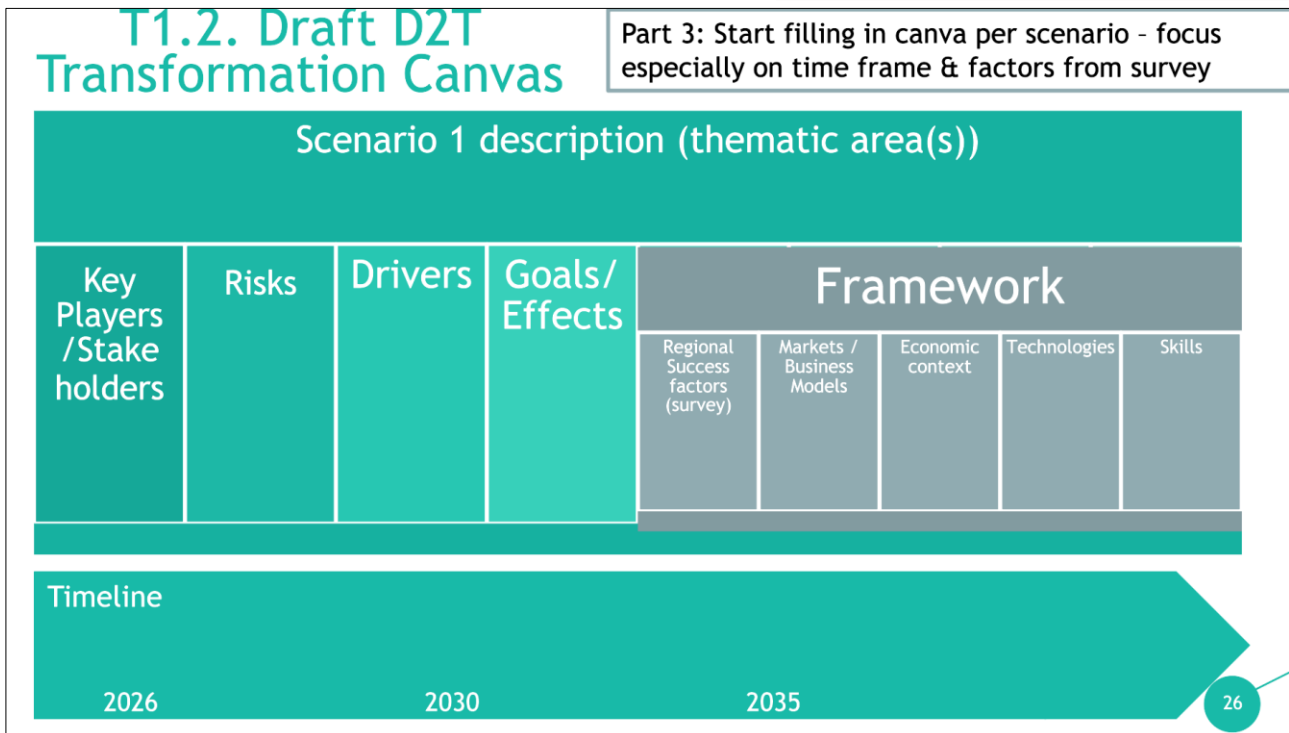


Figure 4 draft Canva

2.2. 2nd regional Workshop / Regional Closing Workshop

To ensure a uniform process and make the results comparable, Biz-Up developed a standardized framework for the second regional workshop. With the support of Christoph Reiss-Schmidt from Biz-Up, an initial workshop design was created and presented to the project partners at the beginning of March, together with a methodology training for Persona Building and Lego® Serious Play®. After discussing the workshop design and the respective resources of the project partners, and also about the possible time resources of potential participants, a decision was made to implement two standardized approaches:

- A full-day workshop
- A half-day workshop

Both formats are based on Persona Building, Lego® Serious Play® and Business Model CANVA. However, in the half-day format, the Company Persona is created before the workshop. In both cases, the scenarios developed in the first regional workshop are considered.

In the first step, participants developed a fictional or real Company Persona. Following this, they used Lego® Serious Play® to build a vision for the year 2035 for their company, ensuring that the scenarios from the first regional workshop were taken into account.

In the second part of the workshop, participants conceptualized a product or service that their company would offer in 2035 to realize their vision. They then built this concept using Lego® Serious Play® to bring it to life. Following this, the developed products/services were positioned within a Now / Wow / How / Ciao matrix and prioritized based on relevance by the participants. Finally, for the highest-prioritized product/service, each group developed a Business Model CANVA, outlining key strategic elements.

Due to the standardized approach across all regions, the results of the regional closing workshops were comparable among the different project partners, ensuring that the findings could be integrated into A3.2



Use Case Development. For this reason, Pforzheim University, the lead of A3.2, was also included in the workshop planning to ensure alignment with the next phase of the project.

In the following graphics the developed agendas, persona template, CANVA and the Now/Wow/How/Ciao Matrix are shown.

2ND WORKSHOP - DRAFT AGENDA 1 DAY

08:30 Welcome, Information about the workshop
09:00 Build company persona
10:45 Coffee Break
11:00 Vision for the company for 2035 per person → consider the szenarios from WS1
11:15 Presentation within the group
11:30 Common vision of the company for 2035 per group
11:55 Presentation of each group - challenge by other participants
12:15 Lunch
13:15 What products/services does the company offer in 2035 so that the vision is realised? Per person
13:35 Presentation within the group
14:00 Merger/design/discuss the products/services per group
14:25 Presentation of each group - challenge by other participants
14:40 Coffee Break
14:55 Now/wow/how/ciao for products/services per group
15:15 Present and discuss now/wow/how/ciao & Prioritize
15:30 CANVAS (1 product/service per group)
16:15 Presentation canvas
16:30 Wrap up, next steps
17:00 End

Figure 5 draft agenda closing workshop - full-day workshop

2ND WORKSHOP - DRAFT AGENDA 1/2 DAY

Prepare in advance:

- Different company personas per topic
- Different visions to choose from per topic (consider visions from 1st workshop)

12:00 Welcome, information about the workshop
12:15 Present company personas & visions
12:30 In groups → choose company persona & vision and adapt them so that they suit the group
13:15 What products/services does the company offer in 2035 so that the vision is realised? Per person
13:35 Presentation within the group
14:00 Merger/design/discuss the products/services per group
14:25 Presentation of each group - challenge by other participants
14:40 Coffee Break
14:55 Now/wow/how/ciao for products/services per group
15:15 Present and discuss now/wow/how/ciao & Prioritize
15:30 CANVAS (1 product/service per group)
16:15 Presentation canvas
16:30 Wrap up, next steps
17:00 End

Figure 6 draft agenda closing workshop - half-day workshop



Company / Persona

Company Background	Demography	Logo & Name
Identification		
Expectations, goals & emotions	Challenges	

Figure 7 draft company persona

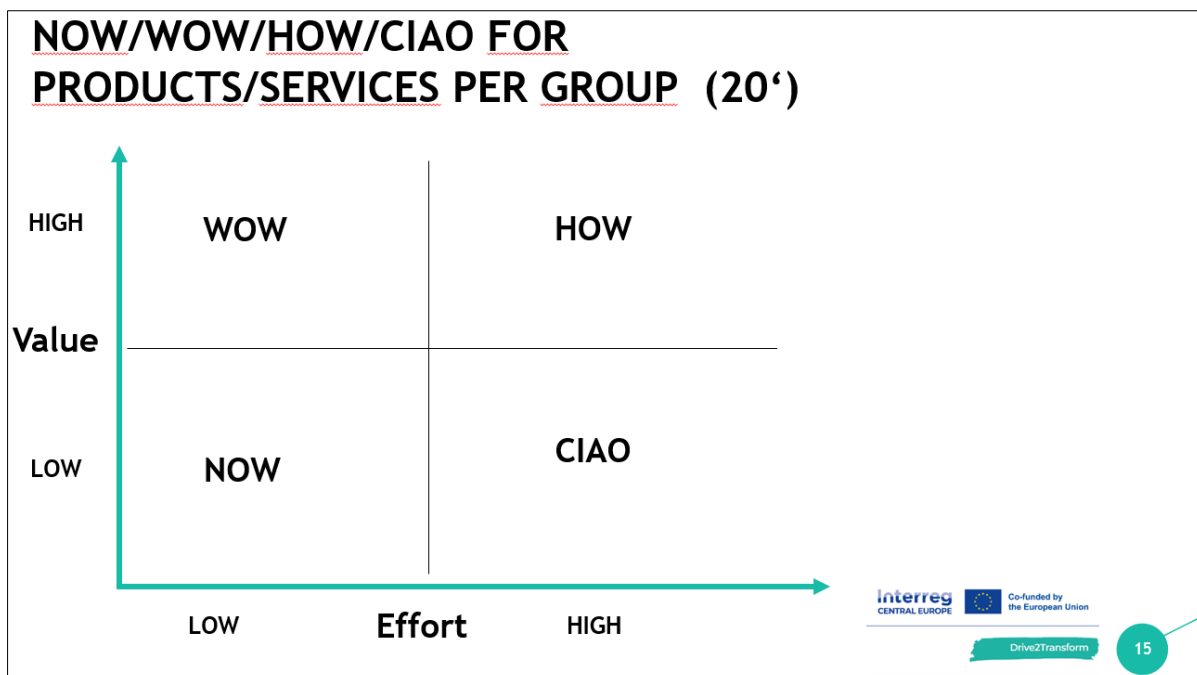


Figure 8 Now / Wow / How / Ciao matrix



CANVA - 1 PRODUCT/SERVICE PER GROUP (45‘)

Description New product/service	Key activities to implement the new product/services (incl. timeline)	Business strategy and KPIs – of the new product/service	Client segments
Value proposition		Key resources to implement the new product/service	Client relationships
			Channels

Figure 9 draft Business Model Canva

[OBJ]



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2.3. Transnational Workshop

With Biz-Up as the lead, and in collaboration with Techbase Regensburg and Pforzheim University, preparations for the transnational workshop began in April 2025. PBN was also closely involved in the coordination, as the workshop took place within the framework of Automotive Hungary / Industry Days 2025 in Budapest. This was intended to ensure that more international stakeholders participated in the workshop, thereby gaining a better understanding of transnational scenarios and use cases. The results will subsequently be incorporated into A3.2 Use Case Development.

As part of the workshop preparations, Biz-Up developed transnational scenarios, based on the regional scenarios from the kick-off workshops held across the different project regions. For each topic area (Electrification, Automation, Connectivity, Platform Economy), the scenarios developed in all regions were screened and consolidated into a single transnational scenario. A review and adaptation process was conducted by the project partners to ensure alignment and relevance.

The workshop design, based on the World Café method, was similar to the first regional workshops. For example, the well-known Business Model Canvas was utilized, as it had already been used in the regional workshops. This approach enabled a direct comparison between the regional and transnational results.

In the first step, participants were given time to read and understand the developed transnational scenarios. Additionally, they had the opportunity to make adjustments and modifications to the scenarios as needed.

For the second part of the workshop, a Business Model Canvas was developed using the familiar template, incorporating the dimensions of the Transformation Readiness Model (TRM) from A1.1 to ensure continuity within the project. Participants then completed the Canvas for their written scenarios (2035), based on the assumptions within their topic area.

Subsequently, the groups rotated clockwise, with a “group speaker” remaining at the table to act as the table host. Participants had the opportunity to expand and adapt the completed Canvas, allowing them to delve deeper into an additional topic area.

The draft agenda is illustrated in the following graphic:



DRAFT AGENDA TRANSNATIONAL WORKSHOP

10' presentation transnational scenarios



20' adapt/change/ add transnational scenarios



75' World Café Workshop
Filling in Canva
(40', 10', 10', 10')



5' Closing & Next steps



Figure 10 draft agenda transnational workshop

3. Conclusion

The deliverable D1.2.1 has successfully demonstrated the value of a structured, stakeholder-driven approach to scenario development within the Drive2Transform project. By engaging regional and transnational stakeholders through a series of standardized workshops, the project has ensured that the transformation scenarios reflect both local specificities and broader European trends.

The use of established methodologies - such as the Business Model Canvas, Persona Building, Lego® Serious Play® - and also the Transformation Readiness Model enabled consistent and comparable outputs across all participating regions. These tools facilitated the co-creation of future-oriented scenarios in the key thematic areas of electrification, connectivity, automation, and platform economy.

The regional workshops provided a foundation for understanding localized transformation dynamics, while the transnational workshop synthesized these insights into a cohesive European perspective. This dual-level approach has not only enhanced the relevance of the scenarios but also strengthened cross-regional collaboration and knowledge exchange.

The outcomes of this deliverable will directly inform the subsequent development of use cases under Work Package A3.2, ensuring continuity and alignment throughout the project lifecycle. Overall, D1.2.1 contributes significantly to the project's overarching goal of supporting the automotive industry's transformation through integrative, stakeholder-informed strategies.