



## **The 8th European Future of Transport Conference 2023**

### **The Transformation of the Automotive Sector**

Finding the balance between European environmental, trade and industrial policies

28 March, 2023. The Thon Hotel, Brussels

Europe's transport and mobility sectors are at the start of an unprecedented transformation. For the vehicle industries, zero-emission mobility is the near future, demanding a significant restructuring of manufacturing and innovation processes. As data, AI and connectivity begin to deepen their integration with vehicles and transport networks, the potential to drive insights, efficiencies and services becomes ever more apparent, promising improvements to traffic management and safety while boosting and enabling European and global climate objectives.

Electrification is now also essentially mandated, with EU rules stating that cars and vans available on the EU market from 2035 must be zero-emission. The rules also state that there should be a 55 per cent cut in CO2 emissions for new cars sold from 2030 versus 2021 levels. While this will accelerate the transition towards electrification in the transport system in Europe, it also poses several critical questions for the automotive, energy, and broader industry ecosystems.

For the 2035 deadline to be viable, Europe's access to raw materials, vital in producing batteries and semiconductors for vehicles, must be vastly improved, so that supply chain issues do not block rollout. Investments in charging networks across Europe must be ramped up to ensure adequate capacity. At the same time, the availability of reliable energy sources is a prerequisite to ensuring that electrification, including the building of new battery cell factories and other energy-intensive industries in Europe, are viable. The discussion around the contribution that synthetic fuels can make will be vital in the coming years. Significant focus also remains on improving the affordability of EVs and on driving down the carbon footprint of EV production.

This year's conference will look at Europe's automotive sector in its role as a significant employer and innovator facing unprecedented volatility and upheaval. What does the future look like for the European vehicle and batteries sector? What support does it need from regulators to survive and thrive in the green transition? How will geopolitics impact progress to zero-emission mobility for 2035? What progress is the sector making in the tilt towards software and digital, and as we move towards 5G-Advanced and eventually to 6G, what new use cases and applications are going to emerge and how can these be harnessed to make our roads and cities smarter and safer?

09:00 – 09:30 **Registration and Coffee**

09:30 – 10:15 **Keynote Session**

10:15 – 11:30 **Session 1 – The Transition to Zero-Emission Vehicles – Ensuring there is a market and a thriving industry for 2035**

It is now law that cars and vans placed on the EU market must be zero emission from 2035. This mandate demands an accompanying policy framework that ensures this deadline is viable. The European Commission has brought forward the review point to 2026, where an assessment will be made on progress towards the 2035 deadline. But what will progress look like, and what will conditions in 2035 have to look like for this transition to succeed?

As the European automotive sector transforms, there has been much discussion about its ability to continue to be globally competitive. This session will analyse the transition the sector is making and the development of the market for EVs in Europe. In the context of the 2023 year of European Skills, what will this major transformation of such a significant European sector mean for skills and employment to meet these obligations? How will the industry evolve? What role will there be for the continuation of the production of ICE vehicles for export? To avoid stunting the market for EVs, what needs to be done to ensure that supply chains are resilient, particularly in the case of both semiconductors and raw materials? How will so-called techno-nationalism interact with the development of the market for EVs through until 2035? How are car makers innovating to drive down the total cost of ownership of EVs?

11:30 – 12:00 **Coffee Break**

12:00 – 13:15 **Session 2 – Electrification, Infrastructure and the Energy Markets: Security, Affordability, and Sustainability for the Green and Electric Transition**

The green transition in Europe will rely on low and zero-carbon energy sources to succeed. Russia's invasion of Ukraine and the subsequent impact on inflation and energy prices have demonstrated that Europe's strategic autonomy must now stretch to ensure that the energy consumed in the EU comes from reliable renewable and low-carbon sources. Both the electrification and digitalisation of transport systems will depend on this scenario, and consumers will require affordable prices to participate in this transition. What are the latest developments in the EU's RePowerEU initiative, and what work is necessary to decouple Europe from unreliable energy sources? What does the likely development of Europe's industrial base, including the building of new battery cell factories and other relevant energy-intensive industries, look like in the current context? Is the European Commission's 45% share of renewables in the European energy mix by 2035 in the current volatile context realistic? What is the likely input and share in the energy mix of synthetic fuels or e-fuels?

13:15 – 14:30 **Lunch**

14:30 – 15:15 **Thinking Point: Future Transport Scenarios – Progress Towards European Hyperloop**

15:15 – 16:30 **Session 3 – The Tilt to Software: Digitalisation, Connectivity and Data Access in the Revolution of the Vehicle**

In parallel to the transition to zero-emission, the automotive sector is undergoing a digital transformation that will revolutionise how vehicles will be manufactured, how they operate and their interactions with the external environment. New electric vehicle architectures offer an opportunity to build vehicles with coherent software platforms from the ground up, but how are European manufacturers developing their software competencies, and what are the innovation stakes at play? What is the latest concerning the development of transport and mobility data spaces in the EU, and what might be the innovation and data access benefits? How are 5G-enabled technologies such as autonomous vehicles and vehicle-to-everything (V2X) communication already starting to redefine the automotive sector? As we move towards 5G-Advanced and eventually to 6G, what new use cases and applications will emerge, and how can these be harnessed to make our roads and cities smarter and safer?

What opportunities are emerging for new revenue streams in connected cars, and how does regulation need to evolve to facilitate new business models? On-demand services, sharing offers, and vehicle usage concepts are already on the market, but what will be the long-term contribution of these new mobility solutions? As new manufacturers enter the marketplace, particularly from Asia and the US, how are European automotive manufacturers working to ensure global competitiveness?

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