INTELLIGENT MOBILITY

NEW USE CASES, PRICING AND BUSINESS MODELS FOR NEW INNOVATIVE MOBILITY SOLUTIONS

10TH - 11TH JULY, 2019
JUMEIRAH CARLTON TOWER, LONDON
Dear Colleague,

Technology advances, demographic changes, and mobility imperatives are combining in a perfect storm, launching the traditional automotive industry into unprecedented disruption. The new mantra is Autonomous, Connected, Electric and Shared. Together, they are incubating unique ecosystems, business models and value chains.

The once successful hardware/products/components centred approach is floundering. Enabled by powerful digital technologies, the axis is shifting to services/software/solutions.

Customer attitudes toward vehicle usership and ownership of personal modes of mobility are transforming dramatically. Access to, rather than ownership of, mobility assets is becoming more common. Simultaneously, the concept of individual vehicle ownership is yielding ground to notions of shared mobility.

Innovative vehicle subscription based ownership models are meeting diverse mobility needs even while opening up the prospect of multiple monetisation opportunities for a wide range of stakeholders - car manufacturers, dealerships, maintenance and repair companies, insurance firms, technology startups, AI companies, lending companies, concierge operators - from a single car.

Meanwhile, connected vehicles are also creating exciting whitespace opportunities for multiple participants at multiple levels. A unidimensional, one-size-fits-all approach is obsolete. Personalisation, made possible by connected technologies, is the next big game changer. Car as a marketplace—from which you can order and pay for your coffee, fuel or even parking - will soon become a reality.

Autonomous technologies are triggering disruption in traditional supply chain and logistics models. The promise of improved productivity and efficiency for the transport and logistics sector; faster deliveries for customers; and better outcomes for online retail giants are highlighting the potential for autonomous technologies in hub-to-hub long transit, inner city delivery, and first and last mile delivery.

Online retailing is the new battleground. Many car manufacturers are selling their vehicles online, either through their own portals or through third party aggregators. Monetisation of car data has become a lucrative revenue stream, with several business models centered on this idea.

Internet of Things (IoT) is expanding to embrace exhilarating possibilities in the 3rd, 4th and 5th dimensions. Flying cars, hyperloops, hypersonic jets and space crafts are turbo-charging toward commercialisation. The automotive industry, adjacent industries and end-users are already bracing for the massive upheaval that will accompany instantaneous mobility modes that transcend time, space and speed.

Non-traditional entrants are jettisoning old approaches with compelling out-of-the-box ideas. Industry players, backed by bold, new business models, are accelerating a vision of integrated, intelligent, and multimodal mobility. Smart and sustainable mobility technologies are targeting a vision of zero emissions, zero accidents and zero congestion.

In our pursuit of better understanding where, why, and how such disruptive transformation will occur, we have identified themes that, we believe, will define the future of mobility. The sessions are meant to stimulate ideas, provoke action and enable stakeholders to distill insights that will make them leaders, rather than followers, of change.

Some new and hot topics we will cover include:

- New Autonomous Business Models
- Car as a Marketplace
- Car as an IoT Platform and OEMs Creating Unique Customer IDs for Personalised Mobility
- Future Mobility Scenarios
- New Subscription based Vehicle Retailing Models

Join us at our 11th annual Intelligent Mobility event which will bring together industry leaders, policymakers, visionaries and investors, to get nuanced insights into how and why the mobility industry is transforming, what new business models are emerging, and where the real revenues lie.

Network with your peers, learn about the future of mobility, and be inspired to lead from the front in this rapidly evolving space.

We look forward to welcoming you to Intelligent Mobility 2019 in July.

Yours sincerely,

Sarwant Singh
Managing Partner, Frost & Sullivan
WORKSHOP HIGHLIGHTS

Frost & Sullivan is proud to again provide a platform featuring high-profile industry experts, thought leaders, parliamentarians and senior executives who gather to debate, discuss and present on the future of mobility and new business models.

WHO SHOULD ATTEND:
Frost & Sullivan’s Intelligent Mobility 2018 drew over 350 delegates representing over 80 organisations from across the world. Keynote speakers from Groupe Renault, Volvo Car Corporation, BMW Group, Bosch UK, Daimler AG, Continental Automotive, BlaBla Car, Ridecell, Shell Fleet Solutions, Volkswagen AG, DHL, Ford, and the UK Department for Transport, among others, shared their vision of the future of mobility. The event included an impassioned debate on the interaction of intelligent mobility and smart cities held at the House of Lords, interactive exhibitions showcasing future technologies, test drives and vehicle displays.

Our annual flagship event attracts a diverse network of industry leaders and is specifically, but not exclusively, designed for:

- Automotive Manufacturers and Suppliers
- Consultants and Engineers
- Fleet Operators
- Logistics Companies
- Leasing Companies and Car Dealerships
- Mass Transport Operators City Planners
- Mobility Integrators
- “New Mobility” Providers, Operators, and Stakeholders
- Policy Makers
- Research Institutions and Universities
- Systems Integrators
- Transport Journalists, Visionaries and Related Associations
- Transformation and Digitisation Executives

KEY OBJECTIVES OF THE WORKSHOP:

Day 1: HOUSE OF COMMONS
Our exclusive event will feature Parliamentarians, OEMs, Mobility Leaders, Car Sharing providers, Government Policy Makers, OEMs, and many others all joined together to debate key trends, policies and provide unique insights into the structure of new business models and their implications to industry stakeholders.

Day 2: INTERACTIVE WORKSHOP
A full day interactive workshop to be hosted at Jumeirah Carlton Tower, London, providing a unique platform to discuss and evaluate Growth Opportunities in new Mobility Business models covering Personal and Public Transport Systems

- Presentations from OEMs, Technology Platform providers, IT Companies, Government representatives, and other industry stakeholders
- Event partner exhibition opportunities to be showcased throughout
- Interactive Workshop sessions throughout the day to review opportunities and challenges in the market
- IP Handouts covering global market potential, infrastructure developments, business models and market opportunities
- Morning introductory breakfast, lunch and networking reception for attendees

ATTENDEES: Approximately 400 delegates
An opportunity for unparalleled industry insight on a broad range of topics:

- Mega Trends and Future of Intelligent Mobility
- Vehicle Manufacturer’s Vision on Mobility
- Car sharing & Corporate Mobility Schemes
- Fleet & Leasing New Business Models
- Big Data
- Cyber - Security
- eCommerce Platforms
- Autonomous Driving and Related Business Models
- Growth & Impact of Retailing for Cars & Aftermarket Parts & Services
- Mobility in Emerging Markets
- Connected Mobility
- Public Transport Mobility Solutions
- Digitalisation of the Automotive Industry
TESTIMONIALS

Our 2018 event welcomed over 350 attendees from around the world from 80 organisations. Attendees from industries such as Automotive, Energy, Infrastructure, Communications and Regulatory bodies.

“Frost & Sullivan brings together the most topical, capable and diverse set of people in Urban Mobility. A must-attend event every year...”

Business Manager,
Jaguar & Land Rover

“The event proved to be an excellent opportunity to get an update of all aspects of urban mobility and the challenges it creates, from the best in the business from around the globe.”

Chief Commercial and Technical Officer,
HORIBA MIRA

“The F&S Mobility workshop provides a unique environment to understand the key mobility market trends and to exchange ideas with industry thought leaders.”

Head of Europe Operations,
IMS
AGENDA

Day 1: 10th July 2019  (By Invitation Only)
Venue: House of Commons

We will be organising a debate in the prestigious Houses of Parliament. We aim to be joined by Parliamentarians, vehicle manufacturers, automotive suppliers, mobility service providers, & policy makers, to debate the impact of intelligent mobility solutions on both personal and public transportation business models.

Chair:
Lord Teverson

Speakers:
Jens Monsees, Vice President Digital Strategy, BMW Group
Sarwant Singh, Managing Partner, Frost & Sullivan

Day 2: 11th July 2019
Venue: Jumeirah Carlton Tower, London

Our full day workshop will feature debates, panel discussions, and interactive sessions.

08:00-08:30  REGISTRATION & BREAKFAST
08:30-09:00  INTRODUCTION
09:00-09:20  KEYNOTE SPEECH
09:20-10:10  PANEL ONE: INDUSTRIES VISION OF THE FUTURE OF MOBILITY

Changing mobility habits among consumers are fuelling an aggressive exploration of new business models that could potentially be an additional source of revenue for the industry stakeholders. These downstream automotive services, including New Mobility business models, FinTech, Driving and Vehicle Services, are expected to grow from $1.1tr globally to over $2.9tr by 2025. Automakers are therefore increasingly shifting gears from only selling vehicles to offering their own mobility and related services. OEMs are employing multiple strategies from data monetisation to targeting “City as a Customer”, whereby they can generate additional revenues from these downstream services. At the same time, new mobility players are emerging across the value chain from Ride hailing firms to offering their own mobility and related services. Panelists will debate and demonstrate the cutting-edge mobility trends disrupting the market and features presentations from OEMs and industry stakeholders who have a passion for changing the way we move in cities.

Moderator:
Sarwant Singh, Managing Partner, Frost & Sullivan

Speakers:
Sebastian Peck, Managing Director, InMotion Ventures (JLR)
Spencer Dale, Group Chief Economist, BP PLC
Roy Williamson, Head of Advanced Mobility, BP

10:10-10:40  COFFEE BREAK

10:40-11:30  PANEL TWO: DIGITAL TRANSFORMATION OF THE AUTOMOTIVE INDUSTRY

As technology advances in mobility at a rapid pace, the digital offerings from the automotive industry will be the future differentiator across brands, both at the front end but also at the back end, including connected supply chains and the Industrial Internet of Things. Whether through digital retailing, financing, or connected and automated driving-related content, digitisation is becoming such a key topic for OEMs that they’re installing new C suite positions for Chief Digital Officers and investing heavily in new digital services. This panel will hear from industry participants of their experiences and the key market trends that are repositioning the industry for the digital era.

Moderator:
Dr. Julia E. Saini, Vice President, Mobility, Global Aftersales and Retail, Frost & Sullivan

Speakers:
Ozgur Tohumcu, CEO
Ben Volkow, Co-founder & CEO, Otonomo
Jonathan Allen, Global Practice Manager – Automotive, AWS Professional Services
Edwin M. Colella, VP Mobility Sales & Marketing, Omoove, An Octo Company

11:30-12:20  PANEL THREE: NEW MOBILITY BUSINESS MODELS AND NEW INDUSTRY PLAYERS

The transportation landscape is moving very quickly...
Our full day workshop will feature debates, panel discussions, and interactive sessions.

from public and private transport being separate businesses, to a more Integrated Multi Modal Mobility Network, fueled by changing demographics, preferences, and technology. From on-demand transportation to offering first- and last-mile connectivity, new entrants are pushing the envelope in terms of providing transportation experiences. The industry is also witnessing new disruptive revenue generation opportunities from Driving services (estimated to be around $125bn by 2025) like Location-based services, User-based Insurance, Data-Driven, Infotainment and Concierge services. This panel will explore these new business models and debate the opportunity and best practices for success.

**Moderator:**
Peter Campbell, Global Motor Industry Correspondent, Financial Times

**Speakers:***
Eugene Tsyrklevich, CEO, Parkopedia
Shwetha Surender, Industry Principal, Mobility, Frost & Sullivan
Mark Thomas, VP of Marketing and Alliances, Ridecell
Isaac Martin-Barbero, Chief of Cities and Communities Officer, Cabify
Martin Villig, Co-Founder, Bolt

14:35-15:20  
**Panel Four: Future Mobility Use Cases for Electric, Connected and Autonomous Vehicle Platforms**

The long-term disruption of the mobility industry is likely to arise when fleets of autonomous vehicles are present in large volumes on our roads. We are already seeing significant efforts in R&D from major mobility players globally, and the positioning of several technology providers as a potential future supply chain. At scale, this is expected to realise a convergence of mobility trends – namely electric, connected, shared and autonomous. Given the significant impact and policy changes that are required to fully enable this market, this session will consider the current trends and technology developments of connected and autonomous vehicles, whilst predicting the future business models that will emerge.

**Moderator:**
Benny Daniel, Vice President – Consulting, Mobility, Frost & Sullivan

**Speakers:**
Markus Kreisel, CEO, Kreisel Electric GmbH & Co KG

**Panel Five: Smart Cities and Their Future Mobility Strategy**

In this panel F&S Smart Mobility team will showcase results from its 12 month research on 100 Smart cities. The session will provide a detailed analysis of the Smart mobility initiatives within the targeted cities, identify the digitalization initiatives from the city policy makers and provide a road-map of implementation of new mobility business models. The team will showcase data and clustering of the cities across 150 data points that have been developed by the team. The panel will invite city legislators and policy makers in a strong debate with corporates to define future vision of our cities of the future.

**Moderator:**
Franck Leveque, Partner & Business Unit Leader, Mobility, Frost & Sullivan

**Speakers:**
Shwetha Surender, Industry Principal, Mobility, Frost & Sullivan
Iain Macbeth, Head of Foresight, Transport for London (TfL)

**Coffee Break**

**Panel Six: Future of Freight Mobility Panel Focusing on Logistics, Supply Chain and Commercial Vehicles**

The retail industry has been transformed by the growth of online shopping and marketplaces. Furthermore, the “on-demand” expectations of customers are demanding faster, more and transparent deliveries of products. This is leading to a transformation of the freight delivery businesses, enabled by several new technologies. This panel will hear the experiences of a combination of new freight service providers and how the established larger 3PL logistics firms and commercial vehicle manufacturers are transforming their businesses and products to leverage new technologies to grow their businesses.

**Moderator:**
Franck Leveque, Partner & Business Unit Leader, Mobility, Frost & Sullivan

**Speakers:**
Jan Kaumanns, CEO, RIO The Logistics Flow
Day 2: 11th July 2018

Our full day workshop will feature debates, panel discussions, and interactive sessions.

16:35-16:50  PRESENTATION: VEHICLE SUBSCRIPTION SERVICES

As the mindset of the consumer market is inclining more towards user-ship, a number of market players have identified the gap between short term rental and leasing and the opportunities it provides; the possibility to offer vehicles on monthly contracts, increasing flexibility, removing long term commitment and even providing options to swap the vehicle used during the contract period. The vehicle subscription services are being currently tested/adjusted or commercially launched by major OEMs, rental companies and start-ups in both North America and Europe and is witnessing the entrance of new players with an increased frequency. With immense market potential, the major and most important move being the one of the suppliers; the build of the best business model, aimed to address the market expectations seems to still be in the works. This presentation will explore this new service, provide insights regarding the current market offering and assess the future potential of this mobility solution.

Speaker:
Octavian Chelu, Principal Consultant, Fleet & Leasing, Frost & Sullivan

16:50-17:00  CLOSING PRESENTATION

Sarwant Singh, Managing Partner, Frost & Sullivan
Aurélie Cheval, Chief Strategy Officer, Europcar Mobility Group

Aurélie Cheval is Chief Strategy Officer for Europcar Mobility Group, a major player in mobility markets. She joined the Group in 2015 to manage the Initial Public Offering and develop the investor relations. In 2017, she set up the Strategy Office to ensure on top of the definition of the Group Strategy its implementation through the Mergers & Acquisitions as well as through a reinforced Project Management Office to drive the execution of the group strategic programs in the fast evolving and exciting mobility world. Today, the mission of Europcar Mobility Group is to be the preferred “Mobility Service Company” by offering alternative attractive solutions to vehicle ownership, with a wide range of mobility-related services: vehicle-rental, chauffeur services, car-sharing, scooter-sharing and peer-to-peer car-rental.

Benny Daniel, Vice President - Consulting, Mobility, Frost & Sullivan

Benny Daniel, Vice President – Consulting with Frost & Sullivan’s Mobility practice, brings with him over 10 years of automotive consulting expertise, with particular expertise covering - R&D Benchmarking; Competitive intelligence and benchmarking; Market Entry and Route to Market Strategy for Glass Manufacturers in Autonomous World; New business model formulation and growth implementation strategy and Pre-due diligence evaluation. Regarded as a domain expert in the electric vehicle market, and automotive R&D benchmarking at a global level, his business model on E-Mobility is globally used by several leading OEMs and utilities. Benny, a recipient of the Best Consultant of the Year Award for four consecutive years (2009-2012), is known for his ability to understand client requirements and work as an engagement leader and has been the key speaker at several Electric Vehicles and Automotive theme based symposiums.

Ben Volkow, Co-founder & CEO, Otonomo

As founder and CEO of three successful companies, Ben brings an extensive track record and rich entrepreneurial experience. Prior to founding ononomo in 2015, Ben served for four years as a Business Unit General Manager at F5 Networks (NASDAQ:FFIV), which he joined after the acquisition of Traffix, where he was Co-Founder and as CEO. As the founder and CEO of Traffix, Ben has built a multi-million-dollar global business, working with partners and tier-1 service providers around the world. Before founding Traffix, Ben managed R&D groups in Sendo (UK), which provided advanced mobile data solutions. Prior to Sendo Ben has filled various roles in Panasonic Mobile Communications (UK), which included building their first European market products. Ben was also Co-founder of VC-backed Sedona Networks, a provider of advanced network solutions.

Dorman Followwill, Senior Partner, Frost & Sullivan

Dorman Followwill’s inspirational leadership and contributions to the global Frost & Sullivan team have accounted for outstanding performance in regional EIA sales and profit as a Partner, Director and Executive Committee member for the Europe, Israel, and Africa region, in 2008 and 2009, as well as record profitability in the Healthcare business unit in North America from 2002-2005. Dorman has played a leading role in some of the largest consulting engagements in the history of the firm, including ongoing projects with Bayer Biologicals and Philips, and key projects with Merck Chemicals, Montagu Private Equity, and Novartis. He also supports several key sales and new business development initiatives in EIA. Dorman has a B.A. in The Management of Organisations from Stanford University and currently resides in Oxford, U.K., with his family.

Edwin M. Colella, VP Mobility Sales & Marketing, Omoove, An Octo Company

Edwin Maria Colella, was born in 1969, studied at the Military Academy of Modena and the Application School, and then graduated from Turin State University with a degree in Computer Science. He started his career in the Italian Army as an Officer of the Transmissions, and then continue at KPMG Consulting in France and Italy as a Director Media Advisory Services. Edwin previously held the role of Global Marketing Director at Ferrari, where he was responsible for the marketing activities in Maranello and in foreign markets, he moved later at the IWC Schaffhausen in Switzerland serving as Global Communication Director. He is currently VP Mobility Sales & Marketing in Omoove wholly-owned by Octo Telematics, specializes in providing integrated technology solutions in support of the Sharing Mobility Operators.
SPEAKERS

Eugene Tsyrlkevich, CEO, Parkopedia

Eugene Tsyrlkevich is the founder and CEO of Parkopedia. Founded in 2007, Parkopedia is the world’s leading parking service provider used by millions of drivers and organizations such as Audi, Apple, BMW, Coyote, Daimler, Ford, Garmin, GM, Jaguar, Land Rover, Peugeot, Sygic, TomTom, Toyota, Volkswagen, Volvo and many others. Parkopedia allows drivers to find parking in thousands of cities, tells them how much it will cost and whether the space is available. Parkopedia also allows drivers to pay for parking online, through a mobile app and in-car. Prior to launching Parkopedia, Eugene started his own computer security firm in the late 90’s, which went on to develop an award winning security product. He has also worked at various technology startups and financial institutions across North America and Europe. Eugene holds both a Bachelor and a Masters degree in Computer Science from the University of California, San Diego.

Franck Leveque, Partner & Business Unit Leader, Mobility, Frost & Sullivan

Franck Leveque currently is Mobility Business Unit Leader as well as Partner with Frost & Sullivan. He had been executing the function of the Mobility Practice Director for Europe, Israel and Africa since 2010. In 2016, he additionally took on the Interim Management of the Americas Business Unit within Frost & Sullivan. Prior to this, he held several functions within Frost & Sullivan such as Director of the Automation & Electronics Business Unit from 2009 to 2010, Consulting Director of the Mobility Business Unit from 2007 to 2008 as well as Programme Director and Project Manager between 2001 and 2006. Before joining Frost & Sullivan, Mr. Leveque worked as a Junior Consultant VMTC, a communication consultancy in the UK. By education, Mr. Leveque has a Bachelor Business Management degree from Oxford.

Iain Macbeth, Head of Foresight, Transport for London (TfL)

Iain Macbeth is an expert on emerging trends and technologies in the transport sector. Currently the Head of Foresight at Transport for London (TfL), Iain sits at the nexus between transport solutions and the challenges that global cities face – population growth, economic and social issues, urban planning, and energy. His expertise covers drones, electric vehicles, connected and autonomous vehicles, as well as emerging models such as Mobility as a Service (MaaS), micromobility and car clubs. Previously, Iain worked in a number of consultancies leading sustainable travel projects, DHL, and a large UK pharmacy chain where he was responsible for transport, security and development control at their head office campus. He is a member of several Advisory Boards and Panels in the UAM and Future Mobility sector; and also works with a number of European and International organisations such as POLIS, the OECD and ERTICO. He is a former chair of the Chartered Institute of Highways & Transportation Sustainable Transport Panel, and was a Director and Company Secretary for the UK Association for Commuter Transport (ACT) and the Boots Benevolent Fund.

Isaac Martin-Barbero, Chief of Cities and Communities Officer, Cabify

Isaac is a Chartered Economist and Trade Expert. LL.M. (Master of Law) from Autonomous University of Madrid. He was President of Ineco between February 2017 and October 2018. General Director for Internationalization in Icex (July 2012/February 2017), General Director of Corporate Services also in Icex from January to July 2012. Previously, he was the Economic and Commercial advisor to the Embassies of Spain in Ankara (Turkey), Ho Chi Minh City (Vietnam) and Riyadh (Saudi Arabia). Additionally, he is also a visiting professor for the MBA program at the Royal Melbourne Institute of Technology. He was a member of the Executive Committee of the OME (Observatory of the Spanish Multinational Company) of ESADE; and Non-Executive Director of CDTI (Center for Technological and Industrial Development) and Cofides. He is also an Associate Member of the Club of Rome.

Jan Kaumanns, CEO, RIO The Logistics Flow

Since May 2018, Jan Kaumanns has been CEO of RIO, the digital brand of TRATON GROUP. The open and cloud-based RIO platform offers a variety of digital services for the entire transportation and logistics ecosystem. Previously, Kaumanns had been responsible for the RIO department platform, partners and strategy. From 2008 to 2017, Kaumanns was employed by the business consulting firm Bain & Company in various positions (latest as manager) where he was part of Bain’s automotive and corporate finance practice. Jan Kaumanns was born in 1980, he is married and has one child. He holds a MBA from Columbia Business School in New York, a diploma in Mechanical Engineering and Management from the TU Berlin as well as a Master’s degree from Ecole Centrale Paris.
SPEAKERS

**Jens Monsees, Vice President Digital Strategy, BMW Group**

Jens Monsees was appointed Vice President Digital Strategy at the BMW Group in Munich in February 2016 being responsible for the Strategy Digitalization in all business sectors. Prior to this, he was Global CEO of the Solution Group Digital Marketing and CDO in the Arvato Board at Bertelsmann AG. Before this, he pursued a number of managerial positions including six years as Branding Director at Google and Brand Manager for Milka, Fa and Toblerone in the consumer goods industry. Jens Monsees has a Graduate in Business Management with a focus on Marketing and Innovation Management from the Universities Kiel and Rotterdam.

**Joerg Lamparter, Head of Mobility Services, Daimler Financial Services AG**

Joerg Lamparter in his role as Head of Mobility Services at Daimler Financial Services is responsible for areas that will change the future of mobility. A major milestone has been the successful closing of the mobility joint venture between Daimler AG and BMW Group in the areas of ride-hailing (FREE NOW), car sharing (SHARE NOW), multimodal mobility (REACH NOW), parking (PARK NOW) and charging (CHARGE NOW) on January 31, 2019. Joerg Lamparter is responsible for Autonomous Services, Digital Mobility Solutions, Urban Mobility Concepts as well as managing the portfolio of several shareholdings such as Blacklane, FlixMobility, Taxify, and Turo. Joerg, who has a degree in technical business economics, joined what was then Daimler-Benz AG in 1996 and held various positions in Germany and abroad. In the early 2000s, Joerg Lamparter played a central role in building up an Internet-based auto finance startup in the USA. From 2007 to December 2011, Joerg Lamparter was responsible for expanding and developing the Mercedes-Benz Financial Services Canada Corporation in Toronto. After this until September 2013, he managed the sales and marketing activities for the car and commercial vehicle division of Daimler Financial Services AG in Stuttgart as Director Sales & Marketing. From July 2013 to February 2016, he was Head of Sales at the Mercedes-Benz Bank. From March 2016 to October 2017, as CEO of moovel Group he was responsible for all activities of the moovel Group (Stuttgart) as well as moovel North America, based in Portland, Oregon.

**Jonathan Allen, Global Practice Manager – Automotive, AWS Professional Services**

Jon Allen is Amazon Web Services (AWS) Professional Services Automotive Global Practice Manager. He leads a team focused on enabling AWS customers to build their IoT, analytics, and cloud capabilities across the automotive industry from connected cars to smart factories. Prior to joining AWS, Jon was a Director at Booz Allen Hamilton managing its Commercial Automotive and Manufacturing practice and led the creation of and served as the first Executive Director of the Automotive Information Sharing & Analysis Center (Auto-ISAC), the industry’s first cyber threat and vulnerability information-sharing consortium. Before joining Booz Allen’s commercial practice, he was a member of the leadership team reestablishing the firm’s enterprise risk and cyber business in the Middle East. For his first nine years at Booz Allen he supported U.S. Government clients within the defense and intelligence agencies developing resiliency and risk capabilities to protect U.S. critical infrastructures. Prior to joining Booz Allen, Jon served as a U.S. Army infantry officer with assignments in Georgia, Korea, Washington D.C., and Texas, which included serving as the senior Army social aide to President Clinton and commanding an infantry company with the 1st Calvary Division. Jon received his B.A. from Norwich University, an M.A. in security studies from Georgetown University. He is the current Chairman for Norwich University’s Board of Fellows.

**Dr. Julia E. Saini, Vice President, Mobility, Global Aftersales and Retail, Frost & Sullivan**

Julia Saini joined Frost & Sullivan in April 2001 and is one of the founding members of the European Automotive & Transportation Practice. In her current role as Vice President, Mobility, she is responsible for leading Frost & Sullivan’s Global Aftersales and Retail Programme Area, with a strong focus on digitisation, eCommerce and new business models. Julia is highly experienced in leading global strategy engagements with a strong focus on project excellence and unconditional client satisfaction. Julia is trilingual and holds a Master (LLB, LLM) and Doctorandus in Law (Dr.).

**Krishna Jayaraman, Program Manager - Connectivity & Telematics, Mobility, Frost & Sullivan**

Krishna Jayaraman is a Program Leader with Frost & Sullivan, focusing on Connected Cars and Automotive IoT. He has been leading connected vehicle research & consulting engagements out of Europe, with his thought leadership spanning topics including Data Monetization, In-vehicle digital services, Cyber security and IoT Platforms. Authored studies in areas of in-vehicle infotainment, human machine interface (HMI), Telematics and Connectivity and has featured in the MIT technology review and other top automotive publications. Jayaraman is an Strategy advisor, a speaker/moderator and mentor at industry leading events; and holds a Degree in Mechanical Engineering specialising in automotive stream.
Mark Thomas, VP of Marketing and Alliances, Ridecell

Mark Thomas is the VP of Marketing and Alliances at Ridecell and is responsible for marketing Ridecell, the world’s leading platform to launch, operate and scale new car and ride sharing mobility services. Prior to joining Ridecell, Thomas headed the connected car marketing team at Cisco Jasper, where he developed the product and go-to-market strategies for automotive OEMs. Prior to Cisco, Mark led product marketing at HERE, a leading automotive maps company. In addition, Mark served in marketing, strategy, and business development roles at Apple and Nokia. Mark holds a B.A. from University of California, Berkeley, and an M.B.A. from the University of Pennsylvania Wharton School of Business.

Markus Kreisel, CEO, Kreisel Electric GmbH & Co KG

Markus, the 2nd of the three Kreisel brothers, was always inspired by the idea of making road mobility more efficient and environmentally friendly. Creating regional value and reducing the carbon footprint to protect the environment has always been of paramount importance to him. His daily journey through an untouched natural landscape soon led to ambitions to keep the emissions as low as possible, without sacrificing driving pleasure. Markus Kreisel is CEO of Kreisel Electric GmbH & Co KG since 2014 with his brothers Johann and Philipp. He is responsible for sales, finance, marketing and public relations at Kreisel. As a solution provider Kreisel offers comprehensive solutions for the energy revolution. Kreisel is known for their development of the most-efficient battery storage packs for e-mobility as well as stationary storage systems. Frost & Sullivan awarded the company the world’s best battery technology in July 2017. Kreisel Electric has been awarded among others with the first Austrian World Summit Innovation Award and Klimaschutzpreis.

Martin Villig, Co-Founder, Bolt

Martin Villig is the co-founder of Bolt (formerly Taxify), the leading European on-demand transportation platform with more than 25 million passengers in over 30 countries. Martin has been an entrepreneur for 20 years, and started and sold his first startup in 1998-1999. He has previously held management positions at Skype, Fortumo and NASDAQ Tallinn Stock Exchange. He is a leading figure in the Estonian startup community, having co-founded Estonian Startup Leaders Club and Garage48 Foundation, which organizes hackathons across Europe. In 2018, Martin co-founded a €1m foundation to kickstart new education initiatives in Estonia. Martin and Markus Villig have been awarded E&Y Entrepreneur of the Year in Estonia 2018.

Octavian Chelu, Principal Consultant, Fleet & Leasing, Frost & Sullivan

Octavian Chelu leads the Fleet & Leasing team at Frost & Sullivan, tracking the evolution and development of the fleet & leasing market across 37 markets worldwide, as well as the detailed fleet segmentation analysis (powertrains, sales channels etc.) and mobility services evolution. With over 15 years experience in product and business development in different industries, his current consultancy expertise is focused on company car market and its financing types, mobility services development and dedicated consultancy projects based on specific OEM and financing companies needs.

Ozgur Tohumcu, CEO

Ozgur Tohumcu has 20+ years of expertise in building and delivering digital products. Prior to joining Tantalum, Ozgur was responsible for Ericsson’s Digital and Cloud business for Western Europe and led a number of digital transformation programs. As CEO of Tantalum, his focus has been scaling Tantalum’s products to customers in the automotive, telecoms and insurance industries. Ozgur has an MSc in Technology Management from the University of Pennsylvania.

Peter Campbell, Global Motor Industry Correspondent, Financial Times

Peter Campbell is the Financial Times’ Global Motor Industry Correspondent, based in London but with a global remit. He leads the FT’s coverage of the industry, online and in print, and works with a team of local correspondents around the world to cover the major car makers, industry trends and technological breakthroughs. Prior to this, he covered technology and UK company news for the FT. He has previously written about media, telecoms, technology, industry and tax, and was named Young Journalist of the Year at the British Press Awards for 2014. Mr Campbell holds a BA in Politics from the University of York.
Roy Williamson, **Head of Advanced Mobility, BP**

Roy has an honours business degree from Heriot-Watt university and started his career in Unilever as a graduate trainee in Finance. After qualifying as a Chartered Management Accountant he transferred to Marketing and spent 15 years in brand management and commercial roles in Unilever in the UK, Middle East, US and Africa building brands and businesses in personal care, detergents and food. He joined BP in 2002 as Marketing Director for Castrol Europe, was promoted to head up passenger car and motorcycle brands globally before founding Castrol innoVentures in 2012, a corporate venture and innovation unit focused on building disruptive technologies and developing new business models. Roy developed Castrol’s future strategy and represented BP on several start-up boards as well as holding a range of advisory positions including for a major Pharmaceutical business. In late 2016 he moved to lead BP’s Downstream unit focused on building businesses in Mobility and Bio spaces to further develop BP’s position in a low carbon future. Since 2018 he has been leading BP’s entry into Electrification and Advanced Mobility services globally as Vice President Advanced Mobility. This has recently included the acquisition of Chargemaster in the UK and several investments and partnerships in China, UK and the US. Roy is passionate about innovation and new business development in both B2B and B2C environments. He is married with 2 children and a keen sailor and skier as well as an enthusiastic, if mostly frustrated, Scotland Rugby supporter.

Sarwant Singh, **Managing Partner, Frost & Sullivan**

Sarwant Singh is Managing Partner and Regional Leader for the Middle East, Africa and South Asia (MEASA) region at Frost & Sullivan. In addition to these roles, he is also the company’s Global Head of the Mobility, Aerospace, Defence & Security Practice. He is also the leader and founder of a think tank group within the organisation that works on future Mega Trends. Sarwant consults to clients like Ford, Philips, BMW, Fiat group, Nissan, Toyota, UNIDO, Fincantieri and many other high profile organisations leveraging his Mega Trends and Future of Mobility work. He is author of a book titled, “New Mega Trends” launched in Oct 2012 with Palgrave Macmillan has since been sold in over 30 countries and recently been translated into Chinese for a local China market release. Sarwant is a member of the World Economic Forum Transportation group and writes for Forbes. He sits on advisory boards of Nissan, ATi, Leeds University Business School and a few start ups.

Sebastian Peck, **Managing Director, InMotion Ventures (JLR)**

Sebastian Peck is Managing Director of InMotion Ventures, Jaguar Land Rover’s mobility business and corporate venture capital arm. Sebastian started his career at the Boston Consulting Group and later joined the TMT advisory team of UBS Investment Bank, providing corporate finance services for telecoms, media and technology clients. For the past seven years, Sebastian has been involved in early-stage technology businesses as an investor and operator. As CFO / COO of Digital Science, a fast-growing provider of scientific software, he successfully built a business with corporate backing from the ground up. He also established Digital Science as a leading corporate VC, developing its signature investment approach and completing more than fifty early-stage transactions. Sebastian holds an MA in History from the University of Cambridge, an MSc with Distinction in Philosophy and Public Policy from the London School of Economics, and an MBA from London Business School. He is married and lives with his wife and daughter in South-West London.

Shwetha Surender, **Industry Principal, Mobility, Frost & Sullivan**

Shwetha Surender leads the New Mobility team at Frost & Sullivan, providing detailed market research and consulting advice on these topic areas. Shwetha is a recognised thought leader on urban mobility, smart mobility and the future of transport, and worked with leading OEMs, tier 1 suppliers and other key stakeholders to identify and quantify the growth potential of new mobility business models, and how to implement and realise these commercial opportunities.

Spencer Dale, **Group Chief Economist, BP PLC**

BP’s group chief economist, Spencer Dale, is responsible for advising the board and executive team on economic drivers and trends in global energy. He manages BP’s global economics team, providing economic input into the firm’s commercial decisions. BP’s economics team also produces the annual Statistical Review of World Energy and Global Energy Outlook. Spencer Dale joined BP as group chief economist in October 2014. Prior to that, he was executive director for financial stability at the Bank of England and a member of the Financial Policy Committee. Between 2008 and 2014, Spencer was chief economist of the Bank of England and a member of the Monetary Policy Committee. Spencer joined the Bank of England in 1989 and served in numerous roles, including private secretary to Mervyn King and head of economic forecasting. Spencer served as a senior advisor at the US Federal Reserve Board of Governors between 2006 and 2008. He was educated at the University of Wales, gaining a BSc in Economics in 1988 and at the University of Warwick, gaining an MSc in Economics in 1989, whereupon he immediately joined the Bank of England.
Lord Teverson

Having been elected as a Member of the European Parliament for Cornwall and West Plymouth in 1994, Robin Teverson resided as Chief Whip of the European Liberal Democrats from 1997-1999. After this Robin was a Cornwall Councillor. In 2006, Robin was elected as a life Peer. He has since been working on topics including renewable energy and utilities, transport, climate change, economic affairs. He is currently chair of the House of Lords EU Energy and Environment Sub-Committee.

Yeswant Abhimanyu, Principal Consultant, Automotive: Digital Transformation, Frost & Sullivan

Yeswant Abhimanyu is a Principal Consultant with Frost & Sullivan, focusing on Automotive Digitalisation & Mobility Data Businesses. He has been leading automotive research & consulting engagements out of Europe, Latin America and South Asia, with his thought leadership spanning topics including Digital Products & Connected Platforms, Data Use-Cases, Data Audits & Business Set-up, Digital UX, Digital KPIs and Platform-enabled mobility solutions. He works with conceptualising and building mobility data intelligence platforms that enable strategic decision making and development of future business roadmaps. These intelligence terminals offer end-to-end visibility and analysis of our evolving mobility landscape focusing on upstream and downstream mobility data. Abhimanyu is an advisory board member, a speaker at industry leading events; and holds a Masters Degree in Engineering Business Management, from The University of Warwick; and a BEng [Hons] in Mechatronic Engineering from The University of Nottingham.
For almost 13 years, Amazon Web Services has been the world’s most comprehensive and broadly adopted cloud platform. AWS offers over 165 fully featured services for compute, storage, databases, networking, analytics, robotics, machine learning and artificial intelligence (AI), Internet of Things (IoT), mobile, security, hybrid, virtual and augmented reality (VR and AR), media, and application development, deployment, and management from 60 Availability Zones (AZs) within 20 geographic regions, spanning the U.S., Australia, Brazil, Canada, China, France, Germany, India, Ireland, Japan, Korea, Singapore, Sweden, and the UK. Millions of customers including the fastest-growing startups, largest enterprises, and leading government agencies—trust AWS to power their infrastructure, become more agile, and lower costs. To learn more about AWS, visit aws.amazon.com.

Omoove is a leading European Technology Service Provider for Intelligent Mobility corporations, offering end-to-end Shared Mobility and Fleet Management technologies and solutions for Vehicle Sharing operators, Fleet Management companies and Car Makers. Omoove operates more than 20 Intelligent Mobility services across Europe with about 200,000 connected vehicles, 1,000,000 registered users and more than 400,000 rentals per month (as of 31st March 2019). Founded in 2001, Omoove is wholly-owned by Octo Telematics, the largest and most experienced insurance telematics company in the world for number of registered users and managed vehicles. Omoove is headquartered in Rome with local offices in France, Spain, UK, Germany and the United States.

Ridecell empowers new mobility operators, including OEMs, car rental companies, auto clubs, dealer groups, and private fleets to launch, expand, and maximize the utilization of their own ridesharing, carsharing and autonomous fleet services. The company provides an intelligent software platform that runs new mobility services such as carsharing, ridesharing, and autonomous fleet management. End-to-end integration and automation accelerate time to market, enabling Ridecell customers to launch mobility services quickly, operate efficiently, and scale revenues as business grows. The company powers new mobility offerings, including ReachNow, mobility service from the BMW Group, ZITY by Groupe Renault and Ferrovial, and GIG Carsharing service by AAA.

Tech Mahindra represents the connected world, offering innovative and customer-centric information technology experiences, enabling Enterprises, Associates and the Society to Rise™. We are a USD 4.9 billion company with 121,840+ professionals across 90 countries, helping over 935 global customers including Fortune 500 companies. Our convergent, digital, design experiences, innovation platforms and reusable assets connect across a number of technologies to deliver tangible business value and experiences to our stakeholders. Tech Mahindra is the highest ranked Non-U.S. company in the Forbes Global Digital 100 list (2018) and in the Forbes Fab 50 companies in Asia (2018). At Tech Mahindra we live the philosophy of connected world and connected solutions. We appreciate that the new revolution is powered by the intelligent symphony of solutions designing ‘experiences’. With the ever-growing importance of technologies and platforms only those who can create and sustain world class experiences through them will thrive. Consumer ‘experiences’ are driving and disrupting industries like never before. Businesses must build seamless and integrated technology capabilities across dimensions – the digital, the physical, the convergent, and everything in between. That’s when connected experiences manifest. And that’s when enterprises and people alike will be empowered to Rise™ in a connected world.
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