NEW USE CASES AND BUSINESS MODELS FOR NEW INNOVATIVE MOBILITY SOLUTIONS

31ST OCTOBER, 2019

TOKYO AMERICAN CLUB, TOKYO, JAPAN
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 A unidimensional, oneshape-fits-all approach is obsolete.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.

Predictable forms of mobility - air, water, rail and road - are 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 endusers 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:

- Smart City
- Connected & Autonomous Vehicle
- Electric Vehicle
- Future of Freight Mobility

Join us at our Intelligent Mobility event which will bring together industry leaders, policymakers and visionaries, 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 October.

Yours sincerely,

Robin Arthur Joffe
Partner, President - Japan, Frost & Sullivan

Vivek Vaidya
Sr.Vice President, Mobility and Associate Partner, Frost & Sullivan
CONFERENCE HIGHLIGHTS

Frost & Sullivan is proud to 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:

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 CONFERENCE:

INTERACTIVE CONFERENCE

A full day interactive conference to be hosted at the Tokyo American Club 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 150 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

“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

31st October, 2019
Venue: Tokyo American Club

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

08:30 - 09:00  REGISTRATION
09:00 - 09:10  INTRODUCTION
09:10-09:20  OPENING SPEECH
   Speaker: Robin Joffe, Partner and Japan President, Frost & Sullivan Japan
09:20-09:50  KEYNOTE SPEECH:
   Speakers: Sarwant Singh, Managing Partner, Frost & Sullivan
09:50-10:30  THEME 1: INDUSTRIES VISION OF THE FUTURE OF MOBILITY (PANEL DISCUSSION)
   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 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.
   Moderator: Masaki Honda, Senior Consulting Director, APAC, Mobility Practice, Frost & Sullivan
   Speakers:
   Tomohiro Fukuzawa, Co-representative Director of CARTIVATOR and CEO of SkyDrive.Inc
   Junya Nishimura, Head, Next Generation Mobility Team (MasS), Odakyu Electric Railway
   Shintaro Hirato, Business Development Japan, Otonomo
   Yves Helven, Managing Director, Connector K.K.
10:30-11:00  COFFEE BREAK & NETWORKING

11:00-12:00  THEME 2: DIGITAL TRANSFORMATION OF THE AUTOMOTIVE INDUSTRY (PRESENTATIONS)
   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 session will hear from industry participants of their experiences and the key market trends that are repositioning the industry for the digital era.
   Presenters:
   Vivek Vaidya, Associate Partner and Senior Vice President, Mobility Practice, Asia Pacific, Frost & Sullivan
   Shyuhei Takahashi, Senior Business Development Manager – Automotive Industry, Amazon Web Services Japan
   Steven Paul Schwinke, Global Head, Connected Vehicles, Tech Mahindra

12:00-12:15  PRESENTATION: MOBILITY DATA INTELLIGENCE PLATFORM
   The market intelligence industry is changing. We can now collect an unparalleled amount of data from multiple diverse sources. Hence, our customers are no longer willing to base their decisions on estimates. They look forward to fact based figures; they want it fast, real-time and structured. They want Data Intelligence! Through a newly set up subsidiary, Frost & Sullivan has pre-empted this trend and therefore have started to develop Digital Data Intelligence Platforms. Now, we want to expand it, integrate our efforts into a Single Integrated Mobility Terminal. We will deliver Digital data analytics and strategic insights based on it. Our first endeavour focuses on the EV and Hybrid market globally, closely followed by New Mobility in the coming months. F&S’s end-to-end EV and Hybrid Data Intelligence terminal provides information and analytics across the entire vehicle life cycle from Raw Materials to Battery 2nd Life. It covers over 70+ countries, across sales, forecasts, components value chain, charging, incentives and ownership methods. Through our efforts, we aim to become pioneers in shifting from Market intelligence to Digital data intelligence.
   Presenter: Sarwant Singh, Managing Partner, Frost & Sullivan
THEME 3: FUTURE OF CONNECTED & AUTONOMOUS CARS AND NEW BUSINESS MODELS (PRESENTATIONS)

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 impacts and policy changes that are required to fully enable this market, this session will consider the current trends and technology developments from industry and policy experts, and longer-term projections, roadmaps and impacts of connected and autonomous vehicles, whilst predicting the future business models that will emerge.

Presenters:
Sarwant Singh, Managing Partner, Frost & Sullivan
Makoto Kawashima, Director of Sensor Business Department, Murata
Mark Thomas, VP - Marketing and Alliances, Ridecell

THEME 4: GLOBAL ELECTRIFICATION TRENDS AND NEW VEHICLE ARCHITECTURES (PRESENTATIONS)

We at Frost & Sullivan believe that the future of the Powertrain in vehicles will be electric. Everything from 2-wheelers to 18-wheeler commercial vehicles are expected to be Electric, and these could be mild full hybrids and also 100% electric vehicles. It is expected that 3 mn Plug in and full battery electric vehicles will be sold in 2019, which is expected to be a 35% growth from 2018 sales. We will see over 350 models of vehicles and battery pricing falling below $100KWH by 2025 with new chemistries like solid state batteries emerging. OEMs will also build new vehicle platforms and architectures. This session will discuss the future growth opportunities in the Electric vehicles eco system, OEMs strategies for building dedicated vehicle architectures using skate board approach, new and future battery chemistries and opportunities across the entire value chain. This will include future component strategies and also 2nd life of batteries.

Presenters:
Vivek Vaidya, Associate Partner and Senior Vice President, Mobility Practice, Asia Pacific, Frost & Sullivan
Markus Kreisel, CEO, Kreisel Electric Gmbh & Co KG
Katsuko Kazuka, GM, Japan EV Business Department, Nissan Motor Company

THEME 5: SMART CITIES AND THEIR FUTURE MOBILITY STRATEGY (PANEL DISCUSSION)

In this session 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 an clustering of the cities across 150 data points that have been developed by them.

Moderator:
Yoshiro Tsuruhara, CEO, AutoInsight, Inc

Speakers:
Franck Leveque, Partner & Business Unit Leader, Mobility, Frost & Sullivan
Yudai Mori, General Manager of MaaS Division, Navitime Japan Co. Ltd
Guillaume Gerondeau, Vice President - Transportation & Mobility Industry Asia, Dassault Systems

THEME 6: FUTURE TRENDS IN GOODS TRANSPORTATION (PRESENTATIONS)

Transport & Logistics form the backbone of economic and social networks, accounting for 10-12% of the world’s GDP and 20-30% of vehicles operating in cities. Urbanisation, connectivity, e-commerce, and new business models are transforming an industry that is struggling with extremely low margins and intensifying regulatory pressures. Research shows that road transport, both in long-haul and city logistics, is not as efficient as it appears. Thus, the industry is embracing C.A.S.E. Connected, Automated, Services-based business models, and Electric. As change unfolds, what will be the implications and opportunities for traditional market players? What form will such upheaval take? What strategies will be required to convert these disruptive trends into channels for growth and innovation?

Presenters:
Franck Leveque, Partner & Business Unit Leader, Mobility, Frost & Sullivan
Raita Kobayashi, General Manager, NEXT Logistics Japan
Ilhami Arslanoglu, Vice President Asia Pacific Auto - Mobility Sector & Regional Head, DHL Customer Solutions & Innovation

Closing Presentation
Speaker:
Robin Joffe, Partner and Japan President, Frost & Sullivan, Japan
Guillaume Gerondeau, Vice President - Transportation & Mobility Industry Asia, Dassault Systems

Guillaume Gerondeau is Vice President at Dassault Systèmes, Transportation and Mobility Industry Asia. He is an expert in automotive, digital business transformation and smart mobility. Prior joining Dassault Systèmes in 2015, he had a 30 years long career in the automotive industry as Senior International Innovation, Product, Marketing, Sales Executive and Strategy Consultant. Guillaume has experience as an executive in almost all the areas of the value chain in the automobile industry. He was head of global product strategy and product planning at Nissan. He was also heading global brand strategy and product marketing for Toyota after having been in charge of European product planning and marketing. At Renault, he managed a longterm research budget, led the innovation process and the reorganization of the R&D resource management and was managing director of Austrian subsidiary. He also served as senior advisor of Booz Allen and Hamilton (now Strategy & ) specialized in the automotive sector.

Junya Nishimura, Head, Next-Generation Mobility Team (MaaS), Odakyu Electric Railway

Junya joined Odakyu Electric Railway Co., Ltd. in 2003. After engaging in Railroad Operation, Junya was assigned to Railroad Car Division and Transportation Planning Division. He was also seconded to Japan Transport and Tourism Research Institute. Junya has been heading Next-Generation Mobility Team at Corporate Strategy Division since July 2016, and engaging in testing in autonomous bus and development of MaaS.

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.

Makoto Kawashima, Director of Sensor Business Department, Murata

Makoto Kawashima graduated Kanazawa University in March 1987, and joined Murata Manufacturing Co., Ltd. in the same year. He was engaged in designing in High Frequency Product Department. He was seconded to Murata Americas in 1990 and was in charge of FAE of High Frequency Products. He returned to Japan in 1995 and was in charge of FAE for overseas customers in High Frequency Product Department. He was seconded to Murata Electronics Europe (Helsinki) in 2004 and was in charge of FAE of products except for capacitors and inductors. He was back to Japan in 2006 and assigned to Antenna Product Department. He became the General Manager of the departments in 2009, of High Frequency Product Department in 2010, of High Frequency Technology Division in 2014. He has been the Director of Sensor Business Department since 2017.

Mark Thomas, VP - 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.

Masaki Honda, Senior Consulting Director, APAC, Mobility Practice, Frost & Sullivan

Masaki has 12 years of marketing and management expertise, which include business development and investor relations in automotive and transportation industries. His expertise includes in Management of vehicle development projects, Development and implementation of new business models, Management of overseas partners and Financial analysis. Masaki also has 8 years of experiences in consulting and market research in automotive industry, Mobility, mega trends, Market assessment, competitive benchmarking and strategy development. He brings with him Industry Expertise Experiences in marketing and management functions in Automotive (Vehicle Manufacturer, Tyre Maker) Transportation (Courier and Logistics). He holds a Master of Business Administration from Bradford University and Bachelor of Arts (Economics) from Hitotsubashi University, Japan.

Robin Joffe, Partner and Japan President, Frost & Sullivan Japan

Robin Joffe has over 30 years of international business experience in market entry across Asia, United States and Europe. Skillful in Sales and Channel Management, Strategy Mapping and Business Transformation. Having expertise across sectors such as Information & Communication Technology, Healthcare & Pharmaceuticals and Financial Services, Robin advises clients on geographical expansion and business growth. Robin is a Partner in Frost & Sullivan as well as President of Japan branch, overseeing sales and management of the firm. He gave speeches at many conferences in and outside of Japan, including Hitachi Social Innovation Forum 2017 Brisbane. Robin holds B.A. in International Business, Hofstra Univ. NY, USA. He also holds MBA from Kellogg Graduate School, Northwestern University as well as Hong Kong University of Science and Technology Hong Kong SAR.

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.co-founder of Virya Mobility 5.0. He is also an investor and on the board of several clean-tech startups.
Shintaro Hirato, Business Development Japan, Otonomo

Shintaro Hirato manages Business Development for Otonomo in Japan. The Founder and CEO of Jakore, Inc., Mr. Hirato specializes in bridging Israeli high-tech companies and JP/Asia companies. Shintaro has led M&A, GF/JV expansion, and PMI for e-commerce and digital content businesses, as General Manager of Global Expansion in Rakuten. Until recently, Shintaro held the positions of General Counsel and management member for Viber, which Rakuten acquired for $900M, spending his time in Israel, Japan, and other parts of the world. Shintaro also acted as Managing Director for Viber’s CVC fund leading seed investment and portfolio management, and managed Viber’s Japan team. Shintaro also acted as Chief Compliance Officer for Rakuten’s Digital Contents Company. Prior to Rakuten, Shintaro has worked at major global companies and law firms in the USA and Japan including GE Capital, NTT, and Sidley Austin. Shintaro earned his BA Law degree from Keio University, his LL.M from the University of Chicago Law School, and is a licensed attorney for the State of New York.

Steven Paul Schwinke, Global Head, Connected Vehicles, Tech Mahindra

Mr. Steve Schwinke is an Industry recognized expert in Connected Vehicle Technology. He recently joined the Tech Mahindra Family and supports global opportunities in the Connected Vehicle space and operates out of Detroit. He joined Tech Mahindra after spending 22 years as an Executive at General Motors/OnStar and was elected to the Executive Board of Directors of the Telecommunication Industry Association. As an original member of the OnStar team he developed many of the industry first products and services. Mr. Schwinke has been awarded 30 patents involving telecommunications, telematics and navigation and recently completed work on 9 patent filings relating to 5G technology. Steve was responsible for the design, development and operation of GM’s over the air software delivery platform that re-flashed over 50 million customer vehicles. Additionally, he managed the development and operations of a vehicle data platform that collected and analyzed over 3 billion data elements daily from customer vehicles. Some of the new products he developed included the first Remote Link app that launched on the Volt, in-vehicle apps and a private automotive app shop, the first 4G LTE vehicle demonstrated at CES, OnStar’s first three button telematics unit and Stolen Vehicle Slowdown service. He was also responsible for the connectivity strategy of GM’s AV program and worked directly with the leadership at Cruise Automation. Mr. Schwinke holds a Bachelor of Science in Electrical Engineering degree from the University of Michigan (Ann Arbor) and Master of Science in Wireless Communication Systems degree from Santa Clara University. His cultural values include obsessively building trust, delivering on commitments, constructive conflict and recognizing others.

Shyuhei Takahashi, Senior Business Development Manager – Automotive Industry, Amazon Web Services Japan

Shyuhei Takahashi is a Senior Business Development Manager, automotive industry at Amazon Web Service Japan Co., Ltd. M.S in Waseda University. He has over 15 years of engineering solutions and consulting experience. Previous job was a head of consulting at IT engineering solution vendor. In response to the megatrends of business and technology transformation that is rapidly progressing on a global scale, mainly in the automobile industry, cloud technology has become an indispensable infrastructure of both sides business and technology. That is a mandatory topic for in-vehicle/server-side/end-user services/roadside unit, from large enterprise to start up. He is responsible for market trend analysis, business strategy planning and strategic partnership alliances for this cloud technology.

Tomohiro Fukuzawa, Co-representative Director of CARTIVATOR and CEO of SkyDrive.Inc

Graduated from Engineering dept., Tokyo University. Worked at Toyota Motor Co. for a global procurement of car parts. Won the Cost improvement prize by Toyota production method in many production fields. Participated in CARTIVATOR and became a Co-representative Director in 2014.

Vivek Vaidya, Associate Partner and Senior Vice President, Mobility Practice, Asia Pacific, Frost & Sullivan

Vivek Vaidya is an Associate Partner and Senior Vice President with the Frost & Sullivan Asia Pacific Intelligent Mobility Practice. Vivek Vaidya is an opinion maker, strategic thinker and compelling speaker. He has advised major automobile companies, transportation companies and governments on future scenarios and regulations, market & competitive strategies and strategic partnerships in his career spanning 20 years. He has strong personal relationships with CXO’s in the region. He is a preferred industry analyst for many business channels such as BBC, CNBC, Bloomberg, Channel NewsAsia, ET now etc. He has also spoken at various conferences across the world and quoted extensively in newspapers.
Yoshiro Tsuruhara, CEO, AutoInsight, Inc

Yoshiro had worked as an editor for magazines specialized in new material technologies and in mechanical engineering in Nikkei McGraw-Hill (The company changed its name to Nikkei Business Publications, Inc. later). In 2004, as a Chief Editor, Yoshiro started a magazine “Nikkei Automotive Technology” which was the first Japanese commercial magazine for automotive engineers. He had been the Chief Editor until December, 2013. In May, 2014, Yoshiro founded AutoInsight, Inc. specializing in content editing and creation of automotive technologies and industry. Yoshiro also serves as guest researcher for Nikkei BP Intelligence Group and invited researcher for Waseda University. He has published several books and his column is published serially on Nikkei Business online magazine.

Yudai Mori, General Manager of MaaS Division, Navitime Japan Co. Ltd

Yudai Mori joined Navitime Japan Co., Ltd. in 2009. After Yudai planned the mobile applications “Bicycle NAVITIME” and “Car NAVITIME” at Product Planning Division, as a General Manager of Telematics Division, he developed an online service platform for connected cars, which has been adapted by some European car manufacturers. Yudai also had headed Total Navi Division since 2016 and developed “NAVITIME” which enables users to receive optimum navigations combining several public transportations and walk. Yudai set up MaaS Division in April 2019 and has been the General Manager since then.

Yves Helven, Managing Director, Connector K.K.

Yves Helven is MD at global Corporate Fleet & Mobility consultant Connector KK. Yves has 20 years of experience in the automotive sector (Ford Motor Company, General Electric, TUV SUD). Connector KK is based in Tokyo and gives mobility advice to companies with large car fleets, OEMs, leasing companies and mobility providers. Yves Helven is also editor of GlobalFleet.com, the global leading Leasing and Mobility platform.

Raita Kobayashi, General Manager, NEXT Logistics Japan

Raita Kobayashi joined Hino in 1998 and was in charge of business planning of Service, Parts and Aftermarket Department for six years. Raita was also an instructor of Overhauling and Vehicle Structure at their mechanic training center for two years. After he was transferred to Marketing Department, he engaged in Vehicle Planning/Sales Planning/Pricing Policy/Promotion for 12 years. Now he is with Solution Business Development setting up a new business, NEXT Logistics Japan. He was seconded to MaaS division of Toyota for 9 months and joined e-Palette business.

Ilhami Arslanoglu, Vice President Asia Pacific Auto-Mobility Sector & Regional Head, DHL Customer Solutions & Innovation

Since the beginning of 2012, Ilhami Arslanoglu has been leading the Asia-Pacific activities of DHL’s Automotive sector as Vice President for Customer Solutions & Innovation. He brings more than 20 years of logistics industry experience gained in various roles and functions. Ilhami Arslanoglu joined DHL Supply Chain in 2007 as EMEA’s Vice President for Automotive and Industrial. He then moved to DHL Global Customer Solutions in EMEA as VP, Subsector lead Passenger Vehicles and Global Customer Manager Automotive. He holds a bachelor degree in Business Administration, specialized in Logistics, from the Corporate State University in Mannheim, Germany.

Katsuko Kozuka, GM, Japan EV Business Department, Nissan

Katsuko Kozuka has been leading the Japan EV Business Department where she developed a new marketing model for the Japanese EV market responsible for sales, marketing and pricing strategy. This model has enabled brand strategy and sales promotion such as CRM activities, dealer engagement and activation. She also developed an EV eco-system with several other power companies including ZEH builders, V2H companies and solar panel companies, and created solutions for energy management and reusable batteries. She has a new role as General Manager of the Global EV Division in the EV Operations Department from October 2019.
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.

Originally driven by the vision of integrating the electric drive into all areas of mobility, Kreisel Electric develops the world’s lightest and most efficient high-performance batteries. This technology has already been applied to cars, buses and trucks up to boats and airplanes as well as stationary storage solutions. The core competence of Kreisel include battery development and production, integration & testing, prototyping & serial production and software development. As an international solution-provider, Kreisel Electric develops and produces the most-efficient battery storage packs for e-mobility as well as stationary storage systems. The special assembly and the innovative thermal management are determining the high-performance of Kreisel Electric’s battery technology. The battery cells inside a Kreisel battery pack are constantly cooled or heated through a special liquid so the battery has the perfect temperature at all times. The unique assembly technology through laser minimizes electrical resistance and offers higher charging power. Those and more secret ingredients deliver maximum performance and range for your electric vehicle. Above all the manufacturing is highly automatable and thus economic.

Murata is a global leader in the design, manufacture and supply of advanced electronic materials, leading edge electronic components, and multi-functional, high-density modules. Murata innovations can be found in a wide range of applications from mobile phones to home appliances, and automotive applications to energy management systems and healthcare devices. Murata has built an integrated system of production from raw materials to finished products, and we are continuously developing and accruing our fundamental technology base, such as materials technology, front-end process technology, product design technology, back-end process technology and analytical technology. We also aim at creating new markets and innovations by actively collaborating with outside partners and by developing core technologies and products that anticipate the future.

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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