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INTRODUCTION

The 1st Focus Group, having as a subject Cross-industry cooperation was held on the 27th and 28th of June, 2018, in Cluj-Napoca, Romania and was organized in the framework of the 2nd work package of the **Green Ict deVElopment (GIVE - Reference**: 783398 — GIVE — COS-CLUSINT-2016-03-01) project by the responsible Project Partner (Cluj IT Cluster).

The present report gives an overview on the focus group scope and objectives in connection to the main aims of the project, as well as, offers details about participants, methodology and topics addressed. Furthermore, it describes the way the focus group was delivered and presents in detail the results obtained. Finally, it offers conclusions and recommendations that can be taken into consideration as regards future steps to be taken in order to maximize results.

Focus group scope and objectives:

The overall goal of the 1st Focus Group under the 2nd Work Package of the project with the acronym GIVE was to identify a representative number of new or radically improved cross-cutting products/services/processes based on which further needs can be analyzed and new market opportunities explored.

In line with the project objectives accent was put on interaction of and cooperation between stakeholders representing the three different areas – automotive, green technologies and IT&C – and especially on the opportunities that can be explored with the use of Information Technologies in the automotive and green technologies sectors.

Due to the strong links between the activities under the 2nd work package of the project, i.e. online survey, three focus groups and market intelligence report, the event also had the following specific objectives:

- To offer and input for filtering and prioritizing key words and concepts that were gathered with the online survey,
- To identify and prioritize, as well as deepen technological niches that could be relevant for future innovative products, services and processes,
- To generate ideas about potential new or radically improved products, processes or services that can be further investigated in order to be implemented and launched on the international market,
- To feed in information and results in the market intelligence report that is going to be elaborated in the framework of the same work package of the project.

Focus group topics:

The focus group on cross-industrial collaboration concentrated on the following topics:

- Identification and prioritization of key words and concepts relevant for technological niches in the three fields,
- Identification and prioritization of technological niches, as well as generation and ranking of deeper, more granular technological niches linked to the key words and concepts,

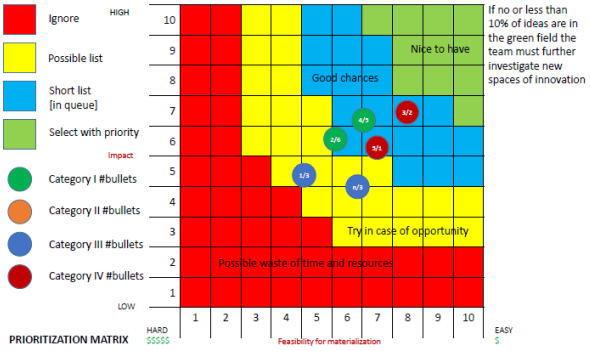
- Identification and ranking of new/radically improved products, services and processes based on their feasibility and impact.

The final **agenda** of the focus group is under ***Annex 1***.

Focus group methodology:

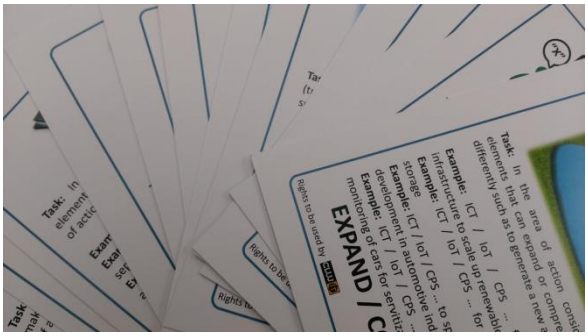
The methodology of the focus group was chosen in such a way to achieve the best possible results taking into consideration the project objectives and deliverables, but also to raise its impact, as well as put the bases for the multiplication of its results. Additionally, accent was put on interaction between stakeholders, co-creation and design thinking.

For each session of the focus group **structured brainstorming** sessions were used as a methodology, participants being split in two or three smaller groups, assuring a mix of various stakeholders coming from the three different sectors, as well as, a balanced representation in each group of various types of key actors, i.e. representatives of clusters, business support organizations, companies.



As instruments the **prioritization matrix** was proposed, as well as cards with examples, in order to direct participants towards more targeted results.

One category of such **cards** was proposed in order to help participants to generate technological niches in green technologies - IT&C, as well as automotive and IT&C. A second category of cards, with different types of innovations was prepared for the part aiming to generate ideas about new or radically improved products, services, processes. At last, but not at least, mind-map diagrams were also planned to be generated in order to cluster concepts, ideas based on linkages and affinity and in certain cases to go more into depth into discussions.



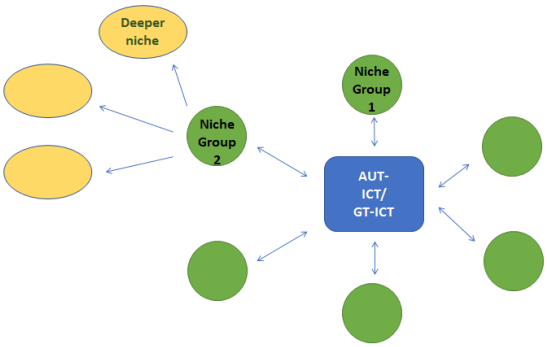
Mains steps for each session:

1. <u>Warm up and selection of key concepts and words:</u>

Inspired by the survey results presented participants organized in 3 mixed groups had to identify key words and concepts relevant for their area of activity, taking into consideration their range of activity as well as challenges to overcome. Key words and concepts written on post-its had to be organized and clustered based on affinity on a flip-chart and prioritized in two steps. In the first step 5 bullets were used by each person to vote on most important words and concepts, in the

second step the most important priorities were ranked according to their impact and feasibility using the prioritization matrix.

2. Identification and prioritization of technological niches:



Each participant was to select 3 prioritized key words/concepts from IT&C, as well as 3 from green technologies or automotive. In a next step based on a variation of at least 6 pairs of concepts/words 12 technological niches were to be generated by each of them. Niches marked on post-its had to be clustered on a flip-chart, prioritized based on an open voting procedure and then, the most relevant ones were to be broken down on a more granular level in two groups, creating a **mind-map diagram**. Cards with guiding principles were also prepared in order to help in the generation of deeper niches.

In a final step according to the methodology the prioritization matrix had to be used in order to rank niches according to their impact and feasibility.

3. Identification and prioritization of new/radically improved products, services and processes:

Organized in three mixed team, participants were to be asked to generate new or radically improved products, services and processes. These too had to be organized on a flip-chart and clustered according to links and affinity, than voted. After voting using bullets, a second ranking was to take place analyzing the impact and feasibility of ideas and the prioritization matrix.

Changes in methodology:

Due to the vivid interaction among participants, as well as their interest to go more into depth in different subjects, especially linked to key words and concepts, as well as technological niches, respectively their expressed need to have open, joint debates on certain issues, completing discussions in smaller teams, the first two sessions needed to be prolonged. Having in mind the need to have a list of new or radically improved products, processes and services generated at the end of the focus group these three sessions, planned to be held separately were comprised in one. Also, based on the results of the first step of generating technological niches, i.e. the generation of both general and more specific ones in the first step, and feed-back from participants preferring joint, open discussions the second part of this session was slightly changed as well. The details about the changes are to be presented in the next part of the report.

Detailed presentation of focus group activities. Key findings and results:

The focus group started with a welcome speech on behalf of Cluj IT Cluster and an introductory round in order for participants to become familiar with each other. This was especially important since several representatives of SMEs and business organization were invited from the three

target areas of the project that did not participate in its activities up until now.

Especially for them a short introduction into the rationale, scope and objectives of the project was given, as well as the aim of the focus group presented and links with prior and upcoming activities underlined.

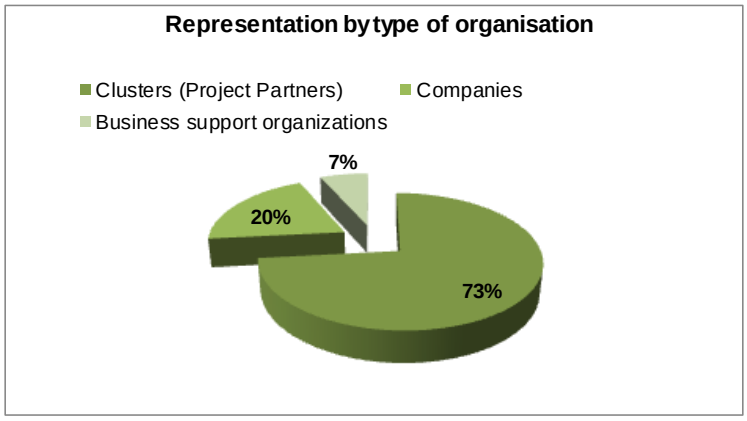
Information regarding the project was delivered in the form of a power point presentation that contains also the detailed presentation of the methodological aspects that were presented at the beginning of each session.

This **presentation** is to be found under ***Annex 2***.

INFORMATION ABOUT PARTICIPANTS

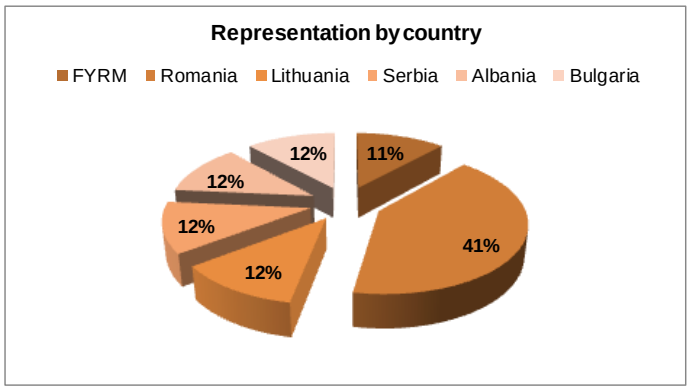
In total 15 stakeholders attended the Focus Group. The vast majority of participants represented the cluster organizations that are partners in the project.

Besides the 11 participants on behalf of these clusters, 3 key actors representing relevant companies from Romania and 1 person from a business support organizations from Romania were also present.



As regards Project Partners, all of them attended, except for the Automotive Cluster from Bulgaria. Nevertheless, their representative joined relevant sessions of the Focus Group through Skype.

Concerning coverage of countries targeted by the project, Romania was represented by 7 out of the total number of 15 stakeholders. The fact that 41% of participants were from this country is mainly due to the fact that the Focus Group was organized here.



As regards other countries, the representation was quite balanced.

Linked to the coverage of project focus areas covered, most of participants were representing the IT&C sector, followed by automotive and green technologies, thus: 8 persons participated representing IT clusters involved in the project, 2 represented a cluster in green technologies and 1 in automotive; 2 out of 3 company representatives represented IT companies and 1 an automotive factory, working as an engineer. The 1 stakeholder representing a business support organization was also an engineer with a research interest in the automotive sector.

The **attendance sheets (list of participants)** can be found under ***Annex 3.***

WARM-UP SESSION AND PRIORITIZATION OF KEY WORDS AND CONCEPTS

The session began with the presentation of methodological aspects than continued with a presentation on behalf of Cluj IT Cluster with the main preliminary findings of the online survey.

This part has been conducted according to the initially proposed methodology, but lasted longer than expected due to the interaction between stakeholders and need for debates and discussions both in groups and in an open, joint format.

Participants split in three mixed groups, assisted by the facilitator, as well as two members of Cluj IT Cluster identified key words and concepts based on online survey results, as well as, taking into consideration their range of activities and challenges, bottlenecks in the targeted countries and sectors.

In a next step key words and concepts written on post-its with pre-defined colors for each of the three domains were clustered, grouped based on affinity and linkages on flip chart papers and jointly discussed.

This was followed by a first step prioritization process, during which participants voted with bullets on the most important concepts and words, those with less than 2 votes being eliminated.

After a joint analyses of the prioritized concepts and key-words, and taking into consideration their type and characteristics, the decision was taken to formulate sub-cluster categories for 2 clusters out of 4. Individual voting on impact and feasibility was performed for each sub-cluster category. Based on arithmetical averages each cluster was positioned on the prioritization matrix.

Main outcomes and results:

Prioritized cluster and sub-cluster categories of key concepts and words:

1. CLUSTER 2 - **INDUSTRY 4.0** with a total number of 30 votes (including those on eliminated concepts/words).
    - SUB CLUSTER 2.1 – **Smart factories** with 18 votes without the eliminated ones

Key words/concepts: smart factory (9), robotization (3), digitalization of production (3), optimization (3)

    - SUB CLUSTER 2.2 – **Connected, smart production** with 11 votes without the eliminated ones

Key words/concepts: IoT (4), business and production intelligence (3)

2. CLUSTER 1 – **SMART, GREEN ECOSYSTEMS**, with a total number of 21 votes (including those on eliminated concepts/words).
    - SUB CLUSTER 1.1 – **Smart green mobility**, with 5 votes without the eliminated one

Key words/concepts: autonomous driving (1), smart mobility (2), mobility solutions – servitization (2)

    - SUB CLUSTER 1.2 – **Smart, green cars**, with 10 votes without the eliminated ones

Key words/concepts: U.X. (2), green cars (4), energy storage (2), electro-mobility; electric vehicles (2)

    - SUB CLUSTER 1.3 – **Smart cities**, **passive buildings**, with 7 votes without the eliminated ones

Key words/concepts: smart cities (4), passive buildings (3)

3. CLUSTER 3 – **CIRCULAR, GREEN PRODUCTION** with a total number of 16 votes (including those on eliminated concepts/words).
    - SUB CLUSTER 3.1 – Circular, green production, with 15 votes without the eliminated ones

Key words/concepts: waste monitoring and management (5), clean production, including circular economy, i.e. reuse and recycle, energy efficiency, e.g. safe and clean energy, through use of biomass or other solutions for energetic autonomy (10)

4. CLUSTER 4 – **SMART IT INFRASTRUCTURES**, with a total number of 13 votes (including those on eliminated concepts/words).
    - SUB CLUSTER 4.1 – Smart IT infrastructures, with 7 votes without the eliminated ones

Key words/concepts: cloud (2), reinforced learning (2), cyber-security (4), artificial intelligence (3)

After the analyses based on feasibility and impact, **all categories of sub-clusters** were situated on the prioritization matrix in the blue area, meaning that they all have **good chances to be feasible and to have an impact**.

The **individual voting** of participants can be seen in the table from **Annex 4**, together with the **prioritization matrix**. As it can be seen sub-clusters 2.1, 3.1 and 1.3 were given on average 9

for impact and 6 for feasibility, sub-clusters 1.2., 2.2. and 4.1 received on average 8 for impact and 7 for feasibility, while sub-cluster 1.1. on average 8 on impact and 6 on feasibility.

List of key words and concepts considered less relevant:

Smart components (1), solutions for traffic jams and air pollution, new materials for electrical vehicle bodies, batteries for electric vehicles, smart grids, prosumers, open-data for green solutions (1), life cycle management (1), D.f.X., augmented and virtual reality (1), upgrade of supply chains (1), ICT as a technology linking sectors (1), use of "space" data, fast adaptation in development of human resources and production, CPS, data analytics (1), optimization/management of human resources, connectivity of equipment, cost optimization, servitization (SaaS).

GENERATION AND RANKING OF TECHNOLOGICAL NICHES

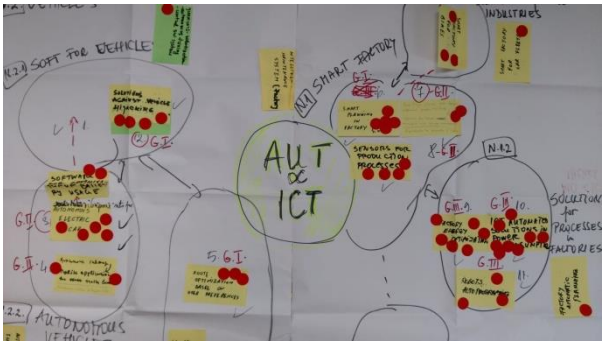
The session has been conducted mainly according to the planned methodology, nevertheless, due to the need to have open discussions and debate regarding the niches identified in a first step it had to be slightly changed. Additionally, during the identification of niches, some, on more granular level, including some pointing towards new products/services/processes were also proposed in the same step, thus being a second argument for these slight changes. The changes, nevertheless did not affect the outcomes of the session.

As a first step participants were asked to individually create 6 pairs out of 3 prioritized key words/concepts selected from IT&C, as well as 3 from Green Technologies or Automotive sectors. Then, for each pair 2 technological niches had to be generated. Niches were then clustered separately for green technologies and IT&C, and, for automotive and IT&C respectively. During this clustering process it could be seen than in most cases more general and more granular niches were also generated, e.g. several deeper niches connected to traffic tracking. Based on joint discussions final cluster categories were formed and niches discussed. In certain cases granular niches were jointly grouped under the more general one, in other cases the general niche was further specified to become a more granular one. Especially regarding the niches generated in the automotive and IT&C fields sub-clusters of more granular niches could be identified.

This was followed by a prioritization based on voting, participants being able to allocate 5 bullets to niches in the green technologies - IT&C group and 5 bullets to the niches in the automotive - IT&C group. As a second step, due to the lack of time, as well as the request of participants for joint discussions, the niches that were not voted at least with 2 bullets were set aside. The remaining ones were analyzed together as regards their feasibility and impact. Niches considered with reduced impact and not likely to be feasible should have been eliminated, but, again, due to the request of participants they were slightly changed in order to become more realistic, for ex. autonomous electric car in solutions and components for autonomous electric cars.

Main outcomes and results:

Prioritized cluster categories of technological niche groups and in some cases their linked sub-cluster categories:



AUTOMOTIVE AND IT&C NICHES

1. General niche cluster 1 – **SMART FACTORY** (11 votes)

Niches considered relevant: smart planning in factory 4.0 (4), sensors for production processes (4), real time shared data between company facilities – software for better transport and storage management, use of cloud in digitalization of production (2)

- Specific niche cluster 1.2 – **SOLUTIONS FOR PROCESSES IN FACTORIES** (18 votes)

Niches considered relevant: *IoT automated solutions in power consumption (8), factory energy optimization (6), robots auto-programming (3)*

Niches considered less relevant: factory automatic planning (1)

- Specific niche cluster 1.1 – **SMART FACTORY SOLUTIONS FOR AUTOMOTIVE INDUSTRIES** (4 votes)

Niches considered relevant: smart factory for bikes (3)

Niches considered less relevant: smart factory for car fleets (1)

2. General niche cluster 2 – **VEHICLES** (*no separate niches or votes for the general category*)

- Specific niche cluster 2.2 – **AUTONOMOUS VEHICLES** (10 votes)

Niches considered relevant: solutions and components for electric cars (5), software for optimization of battery usage (2), autonomous subway mobile application (2)

Niches considered less relevant: autonomous shuttles (1), adaptive, autonomous driving style

- Specific niche cluster 2.3 – **CAR DATA MANAGEMENT** (6 votes)

Niches considered relevant: route optimization based on user preferences (3)

Niches considered less relevant: data protection in smart cars (2), data visualization (1), data storage, easy data acces

- Specific niche cluster 2.1 – **SOFT FOR GREEN VEHICLES** (5 votes)

Niches considered relevant: IT solutions against vehicle hijacking or car hijack protection (4)

Niches considered less relevant: robotization of green cars, i.e. autonomous driving, control sw system (1)

GREEN TECHNOLOGIES AND IT&C

1. General/specific niche cluster 2/2.1 – **GREEN PASSIVE BUILDINGS** (16 votes)

Niches considered relevant: applications, sensors and IoT to control energy conditions in buildings – maximization of energy saving, analyses for self-sustainability, energetic independency (11), automated production lines for modular buildings (4)

Niches considered less relevant: passive buildings with self-improving consumption of energy, cloud solutions for collection of data for passive buildings (1), digitalization of passive building production, efficiency of house production process through the use of IoT, energy loss tracker in buildings (1), automated counters that transmit data in cloud

2. General niche cluster 1 – **GREEN VEHICLES**

- Specific niche cluster 1.2 – **CHARGING OF ELECTRIC CARS** (8 votes)

Niches considered relevant: charging infrastructure (4), smart electric vehicle charging system (4)

Niches considered less relevant: electrical hot spots for charging

- Specific niche cluster 1.3 – **ELECTRONIC VEHICLE SHARING** (6 votes)

Niches considered relevant: smart/electric/green vehicle sharing platform (5)

Niches considered less relevant: dock-less sharing of e-bikes (1)

- Specific niche cluster 1.1 – **SPECIALISED SERVICES FOR ENVIRONMENTAL FRIENDLY VEHICLES** (0 votes)

Niches considered less relevant: route planner (POI, green car friendly), self-scheduled revision of green cars, green taxi vehicles network (1)

3. General/specific niche cluster 4 – **SMART TRAFFIC** (10 votes)

Niches considered relevant: traffic systems for autonomous cars (2), traffic tracking, including passanger monitoring systems in bus stops, smart transport mobile application, optimal city transportation system, artificial intelligence applications in tracking traffic jams, mobile application for GPS tracking of busses, smart traffic lights, use of cloud for traffic management (6), smart parking, including parking spot monitoring application, application for monitoring and reservation of parking spot, cyber security features in parking management systems (5)

Niches considered less relevant: connectivity (internet - infrastructure), Iot in green cars (GPS system, traffic management system, battery saving sustem)

4. General/specific niche cluster 5 – **RECYCLING AND RESOURCE EFFICIENCY** (5 votes)

Niches considered relevant: sensors used in cars, waste trucks, traffic (4), applications for recycling and reuse (1)

5. General/specific niche cluster 7 – **IoT in green technologies** (5 votes)

Niches considered relevant: IoT use in green cars (5)

6. General/specific niche cluster 6 – **CITY SECURITY** (2 votes)

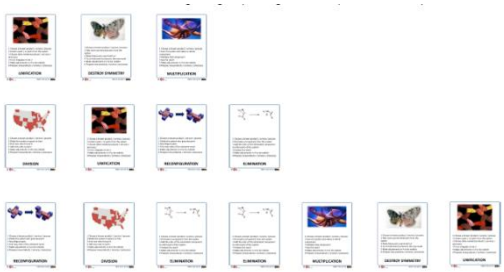
Niches considered relevant: cyber and digital security in cities (2)

7. General/specific niche cluster 3 – **EFFICIENTIZATION OF BIOMASS PRODUCTION** (0 votes)

Niches considered less relevant: use of biomass (robotization for automation of biomass collecting process, transport of biomass), IoT in biomass management (connection of biomass producers; analyses and planning of production capacity)

GENERATION OF NEW/RADICALLY IMPROOVED PRODUCTS, SERVICES, PROCESSES

The lasts three sessions were merged in one, due to time constraints generated by the intense discussions among participants in the previous sessions and in order to achieve desired final outcomes.



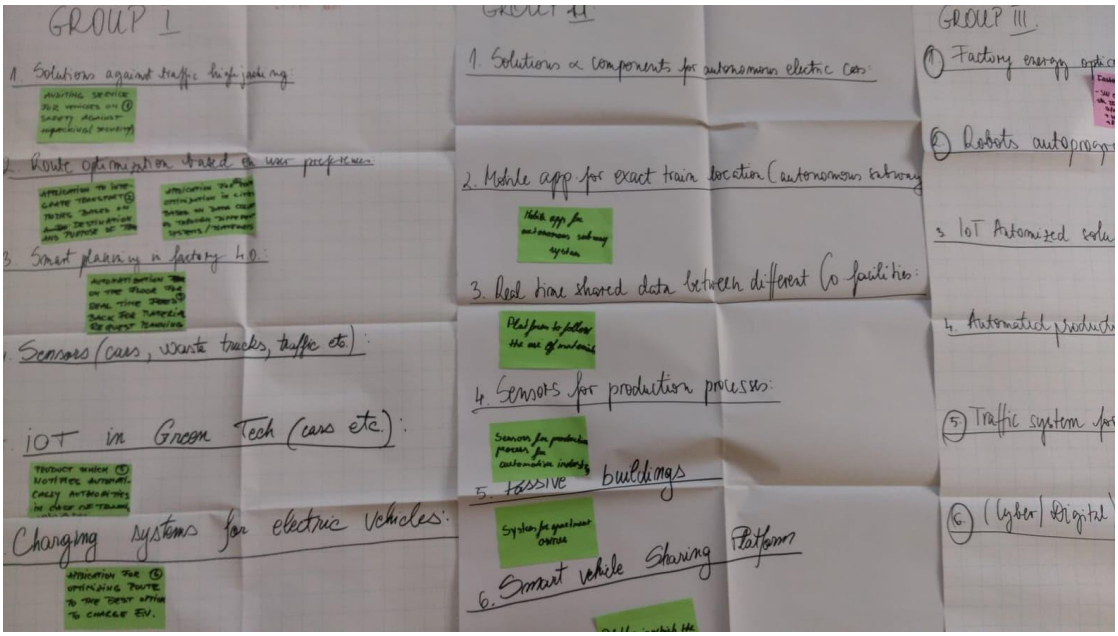
In order to generate new products, processes and services participants were split in three mixed groups, each group taking a mix of 6 technological niches from the green technology - IT&C group and from the automotive - IT&C group. The task of each group was to generate ideas for new or radically improved products, processes and services based on these niches.

For inspiration the 5-vector method was used. Each group was given a pack of 5 **cards** with innovation types that could be used alone or in diverse combinations.

After brainstorming and discussions in smaller groups one person from each group presented the ideas proposed by the group, responding also to questions from other participants, if any. Additionally, participants were free to formulate comments, observations and proposals regarding the new ideas.

Main outcomes and results:

As a result a list of 12 ideas for new or radically improved products, services and processes were generated. Not all niches selected resulted in ideas, but in certain cases proposals for new products or services had at the bases more than 1 niche. In other cases one niche generated two new ideas.



The ideas are the following:

- **Auditing service for vehicles on safety against hijacking**

Short description: The proposed new service would perform auditing of vehicles in order to measure the performance of existing safety systems against hijacking. Potential clients can be car producers or companies that own car fleets.

- **Application to integrate transport modes based on destination and purpose of tram**

Short description: The application would connect modes of transport and would offer viable routes especially for long distance transports. Data collected through different systems would be combined in order to offer optimized route for vehicles based on user preference, for ex. avoiding polluted areas.

- **Application for route optimization in cities based on data collected through different systems/platforms**

Short description: The application would collect data from different existing systems/platforms and combine them in order to offer optimized route for vehicles based on user preference, for ex. avoiding polluted areas.

- **Automation on the floor for real time feed-back for material request planning**

Short description: Proposed solution would use sensors in order to provide real time feed-back for the production about stocks of materials. It would help production planning.

- **Product which notifies automatically authorities in case of traffic incidents**

Short description: The proposed product, installed on cars, would notify automatically authorities regarding traffic accidents. It is destined especially for autonomous cars and for traffic outside localities.

- **Application for optimizing route to the best option to charge electric vehicles**

Short description: The application proposed would analyze different layers of data, e.g. battery life, nearest charging point, in order to optimize routes for electric vehicles taking into consideration the best charging option based on the capacity of car battery.

- **Mobile application for autonomous subway systems**

Short description: The application proposed for users of public transportation would offer data for real time tracking of trains, subways, including estimation of waiting time. Also, it would have other features, like the possibility to purchase tickets, or would calculate the number of users on the vehicle and the length of the journey.

- **Platform to follow the use of materials**

Short description: A cloud solution is proposed for merging digitalized production with storage. The software system would share real time data about the stocks of materials used in production and thus would contribute to the reduction of logistic costs.

- **Sensors for production processes for automotive industry**

Short description: The sensors and connected software would be used in production lines in order to supervise the production process and send notifications in case there are any problems.

- **Systems for apartment owners**

Short description: The proposed system would collect data about the energy use in one apartment, controlling at the same time all equipment using electrical energy, like lighting and heating devices. It would analyze and provide weekly and monthly reports about energy use, energy waist, as well as offer recommendations about optimization of energy use and reduction of costs, e.g. use of certain equipment in periods when energy is cheaper.

- **Platform in which the end user can get all information about electric vehicle rental**

Short description: This combination of a platform, software and mobile application would offer for those interested in renting vehicles the most cost-efficient and environmental friendly solution for type of vehicle – small or big car, motorcycle, etc. - to be rented based on travel distance.

- **Factory energy optimization**

Short description: The complex, integrated solution proposed is a software ecosystem based on reinforced learning that can solve optimization problems of factories especially energy use optimization, optimization of using automated production lines and robots. Additionally, it would also have incorporated cyber security solutions.

CONCLUSIONS AND RECOMMANDATIONS

Conclusions:

- There was a good interaction between participants and a need for open debates and discussions. This from one point of view caused delays, that were successfully overcome by a slight change in methodology, nevertheless from another point of view prove the need for organizing similar events where stakeholders from different sectors and from

different type of organizations from different countries can interact, change views, opinions and can co-create and cooperate.

- The results of the workshop confirm partial survey results, i.e. that IT&C both as a technology and a sector is a driver for innovation and a strong link between the other two economic areas.
- Not all technological niches selected led to a new idea that might mean is some cases that they were not feasible after all, but also the fact that participants, by themselves, without the involvement of other types of stakeholders, did not possess enough knowledge to propose products, services, processes matching these niches. Nevertheless it is good that they were defined, since they define some needs. Other technological niches generated only one idea of a new product coupled with a service that underlines the fact that niches generated are strongly interlinked.
- In most of the cases a clear separation between niches from the green technologies and IT&C, and automotive and IT&C groups could not be made. This might be due to the underrepresentation of green technologies sector, compared to the automotive area. From another point of view is a positive outcome since integrating environmental concerns as a horizontal aspect in innovations implemented by or targeting other industries is really much in line with European trends and with the challenges we confront with in terms of need for reducing harmful emissions, sustainable use of resources, energy efficiency.
- In certain cases no clear-cut difference can be made between key words/concepts, technological niches and products/processes/services generated by participants.
- Certain key words/concepts gained a lot of votes, nevertheless did not result at the end in relevant niches and products/services/processes. This is especially the case of key word “clean production” (resource efficiency, energy efficiency, circular economy in manufacturing industries) that might be worth looking into in the future or in the market intelligence report. The fact that these are not reflected in the final ideas might only be due to the fact that participants were unable to think of a technological niche connected to them or did not choose this key word in the second session.
- Other key words/concepts considered less relevant and thus not voted in the first session returned back in the session regarding the prioritization of technological niches as general or more granular niches and/or in certain cases even products and services. This is the example of “solutions for traffic jams and air pollution”. Similarly, they can be subject of further analyses in the future.
- There are some niches that were voted and thought as feasible and with impact, nevertheless they did not result in any new ideas about products/services/processes, for example use of IoT automated solutions for power consumption. Again, this would be a technological niche worth looking into in a second step of new/radically improved product/service/process generation process.

Recommendations:

A better result in terms of number and type of new or radically improved products, services, processes might have been achieved in case more representatives of companies would have

been present with knowledge about market needs. Also it was clear that participants were not really aware of the latest market trends, emerging technologies.

- It is recommended thus that the main results of this focus group, i.e. technological niches selected, together with the list of new ideas generated, to be circulated by project partners among companies from the targeted countries for the generation of another set of ideas, as well as analyses of existing ones. In this way ideas can be generated also for niches that participants could not link with a new or radically improved product, service or process.

As a next step companies interested in implementing and launching on the market these services, processes, products can be identified, that could work individually or in partnership on developing them. Development can be made not only using own resources, but for the most promising ideas also non-reimbursable funding can be sought for, especially from Horizon 2020 SME Instrument.

- In order to make participants more familiar with new technologies, emerging trends there should be a benchmarking in this sense in the market intelligence report, as well as, a short presentation of them.