

15 September 2025

E-MOBILITY TECH VISION KICK-OFF



OBJECTIVES

- 01** **Align on the current state and needs**
- 02** **Agree on methodology**
- 03** **Agree on next steps**

AGENDA

- Welcome & Framing (10')
- Synthesis of Initial Insights (30')
- The Case for Change (30")
- Co-Creating Our Path Forward (30')
- Team & Governance (15')
- Next Steps & Call to Action (5')

CHECK-IN

- What am I feeling?
- Is anything distracting me?
- What is 1 thing I want to walk away with?

SYNTHESIS OF INITIAL INSIGHTS

From stakeholder interviews, internal analyses and industry reports

STRATEGIC CONTEXT

We find ourselves in a market defined by intense pressure and immense opportunity.

- **The Market Is Consolidating:** The CPO industry has shifted from a network density focus to a consolidation phase defined by a ruthless focus on quality of service, reliability, and cost-efficiency.
- **The Oversupply Challenge:** The public HPC market is facing an underutilization of assets. This is a commercially painful reality that puts significant pressure on margins for all players.
- **The Opportunity:** The long-term forecast for EV growth remains strong. The market will evolve towards fewer, larger, and more efficient players with sustainable margins. This initiative is our chance to build the foundation to be one of those players.

INSIGHTS FROM STAKEHOLDER INTERVIEWS

Our conversations have revealed a profound paradox at the heart of the DSH unit. On one hand, you have a team of "super experts" with a mature platform and "unique competence." On the other, the unit is perceived as a "passive supplier" struggling with "uncoordinated demands."

The Problem is not the Technology, it's the Strategy: We found that the core issue is not a lack of technical capability, but a lack of strategic clarity. Without a unified tech vision, the DSH unit is caught in a reactive cycle. This prevents DSH from making proactive investments in areas that could deliver outsized value.

The Disconnect between Procurement & IT: We heard from Procurement that there have been "surprises" with changing project directions, highlighting a deeper disconnect. The DSH unit is not yet speaking with a single, clear voice. This leads to friction and missed opportunities for synergy and cost savings.

The User Experience Paradox: Despite a technically sound IT backbone, the user experience for both customers and employees is "not so user-friendly" and "very much behind" the market. We've seen that a poor user experience, especially around the core charging process, not only leads to customer dissatisfaction but also drives up internal costs for manual support and fixes.

The Data & AI Opportunity Gap: While Vattenfall has an existing AI platform and governance, we heard that the team lacks a clear plan for its adoption. We also heard about a "shit in, shit out" data problem. Without a clear data strategy and a mandate to address data quality, the potential of AI to drive efficiency and unlock new revenue streams remains an untapped asset.

THE CASE FOR CHANGE

NAVIGATING PERPETUAL TRANSFORMATION

The challenges that we see are symptoms of a larger shift. The reality is that technology, particularly AI, is ushering in a state of perpetual transformation. Our goal is to enable you to build the internal capability to successfully navigate this. This isn't just about a one-time project; it's about building a muscle for continuous evolution.

The Value Case: The Program Pays for Itself Multi-fold: The core of this program is not about cost; it's about investment. You have identified opportunities that, when addressed, can deliver significant ROI. This program provides an umbrella.

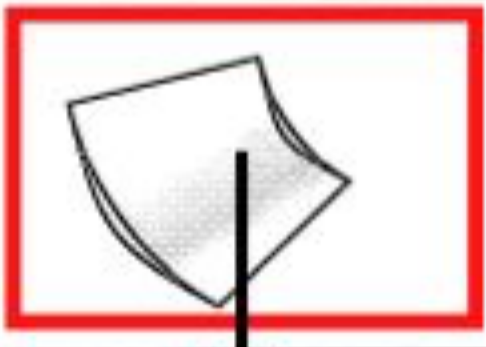
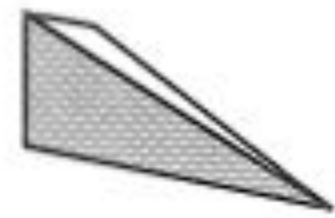


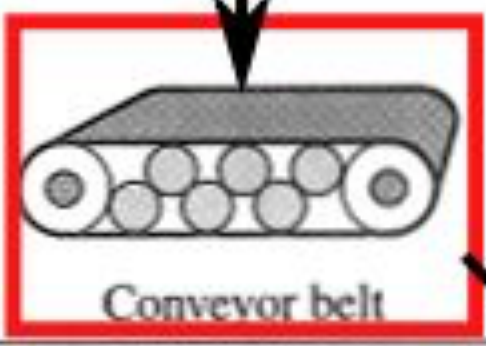

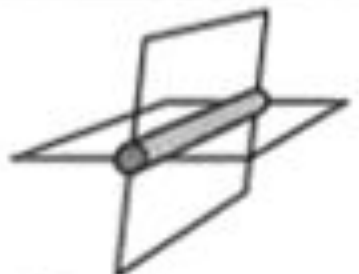



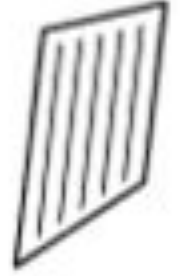
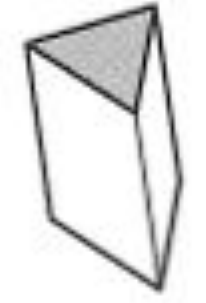
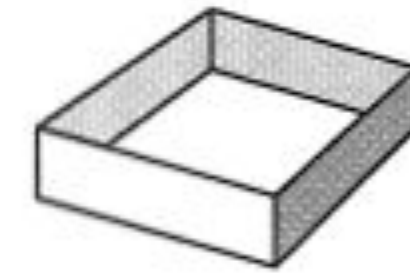

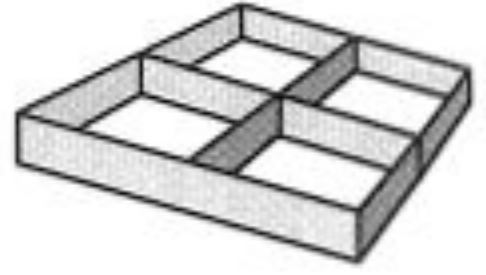
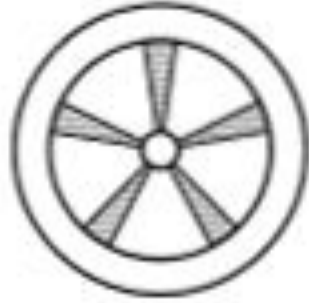
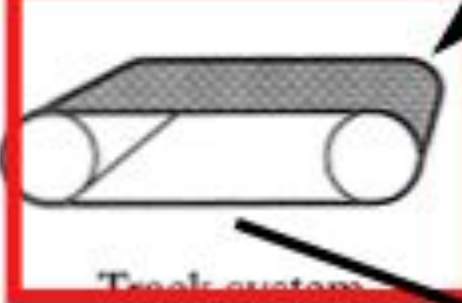

- **Operational Efficiency:** Automating processes like the "charge card process" can reduce manual transactions and free up FTEs. This isn't just a hypothetical; automating a single process like this could yield significant operational cost savings.
- **Revenue Uplift:** The P3 report states that Vehicle-to-Grid (V2G) can generate up to €750/year per car in revenue. Our program will create a clear roadmap to capture this kind of value. Imagine the impact of integrating a strategic technology that can unlock a new revenue stream.
- **Strategic Sourcing:** The internal FPSC Category Deep Dive shows that moving from a "basic" to a "future-proof" procurement maturity can be a significant value lever. By aligning Procurement and IT on a clear tech roadmap, you can shift from reactive price negotiations to a strategic, data-driven sourcing model that drives down long-term costs and secures supply chain resilience. This isn't just about saving money; it's about building a competitive advantage.

METHODOLOGY & DELIVERABLES,

MORPHOLOGICAL ANALYSIS

or general morphological analysis is a method for exploring possible solutions to a multi-dimensional, non-quantified complex problem. It was developed by Swiss astronomer Fritz Zwicky.[1] General morphology has found use in fields including engineering design, technological forecasting, organizational development and policy analysis.[2]

[https://en.wikipedia.org/wiki/Morphological_analysis_\(problem-solving\)](https://en.wikipedia.org/wiki/Morphological_analysis_(problem-solving))

	Option 1	Option 2	Option 3	Option 4
Vegetable picking device		 Triangular plow	 Tubular grabber	 Mechanical picker
Vegetable placing device	 Conveyor belt	 Rake	 Rotating mover	 Force from vegetable accumulation
Dirt sifting device	 Square mesh	 Water from well	 Slits in plow or carrier	
Packaging device			 Bowl	
Method of transportation		 Track system	 Sled	
Power source	Hand pushed	Horse drawn	Wind blown	Pedal driven



AI EATS STRATEGY, CULTURE AND CHANGE MANAGEMENT FOR BREAKFAST

The old mantra was "Culture eats strategy for breakfast."
The new reality? **AI eats all of it.**

Rigid strategies, top-down change plans, and slow-moving cultures were designed for a predictable world. That world is gone. They are no match for the exponential pace of AI.

The only way to thrive is to stop *managing* change and **build an organization that *is* the change.**

The future belongs to organizations that flip the script: instead of forcing people to adapt to new tech, they empower people to wield it.

The goal is an adaptive, resilient organization where AI doesn't just increase efficiency, it awakens and activates human potential



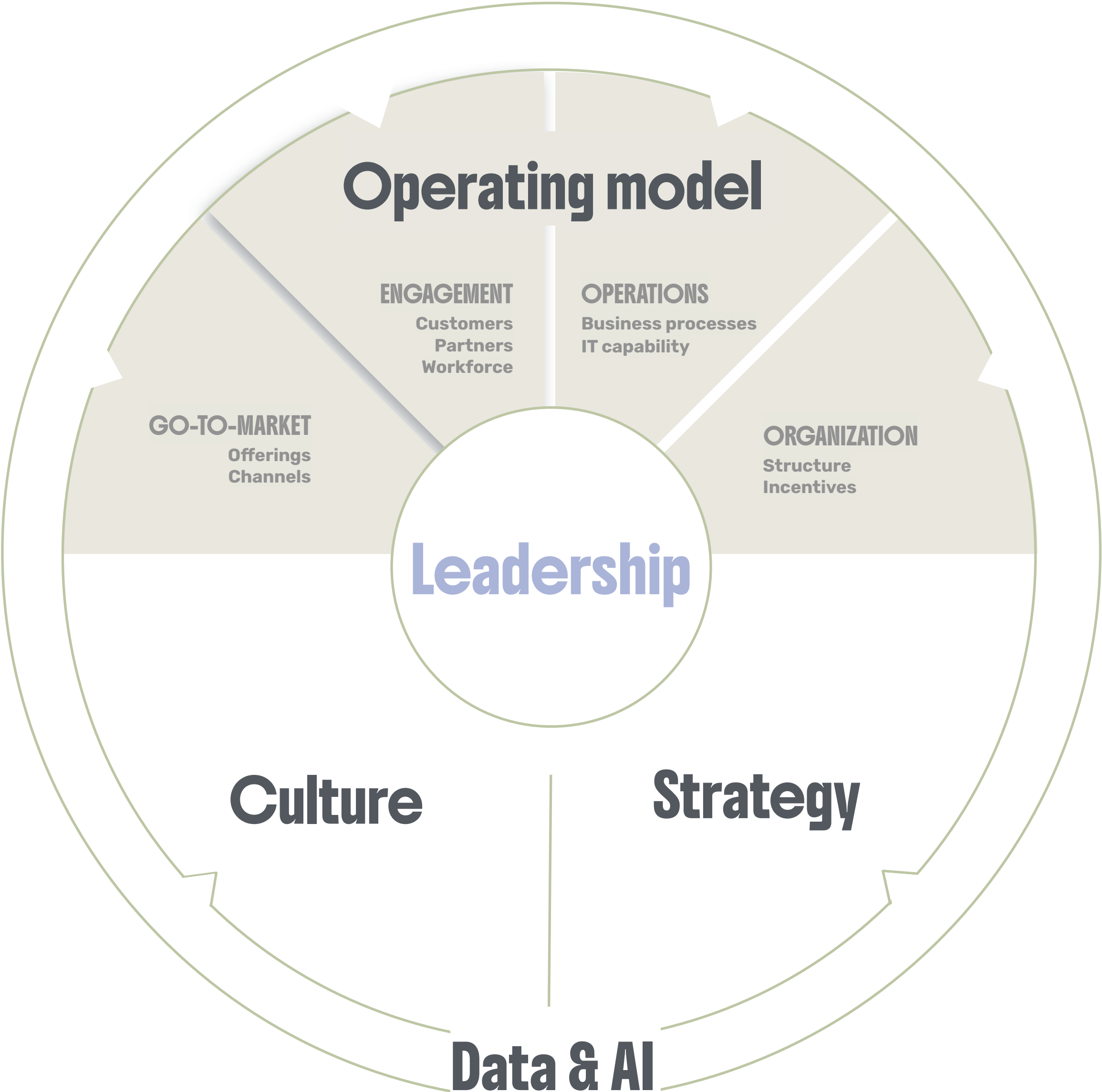
BUILDING BLOCKS OF AN ADAPTIVE ORGANIZATION

The architecture of AI transformations

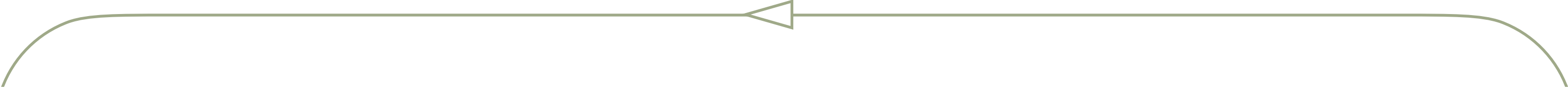
To unlock the full potential of Data & AI, organizations must rethink the foundations of how they operate.

This model defines the core domains where AI must be embedded—not just as a technology layer, but as a strategic capability.

These are the structural anchors that ensure AI transformation is not a one-off event, but a continuously evolving capability.



METHODOLOGY



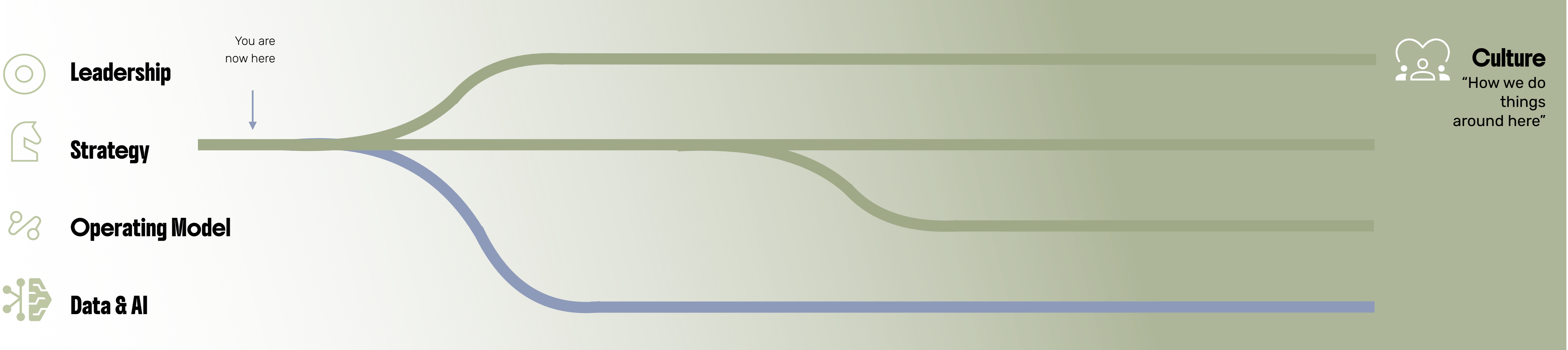
1 DREAM
The 'aspiration'

2 DIAGNOSE
The 'Where'

3 DESIGN
The 'What'

4 DEPLOY
The 'How'

5 DRIVE
The 'How better'



Traditional strategy is obsolete. It was built for a predictable world that no longer exists

REINVENTING STRATEGY

AI-IGNITED, SCENARIO BASED

AI

Velocity, scale, analyzing vast complexities and identifying patterns

People

Sense-making, judgment, purpose-driven dialogue and decisions

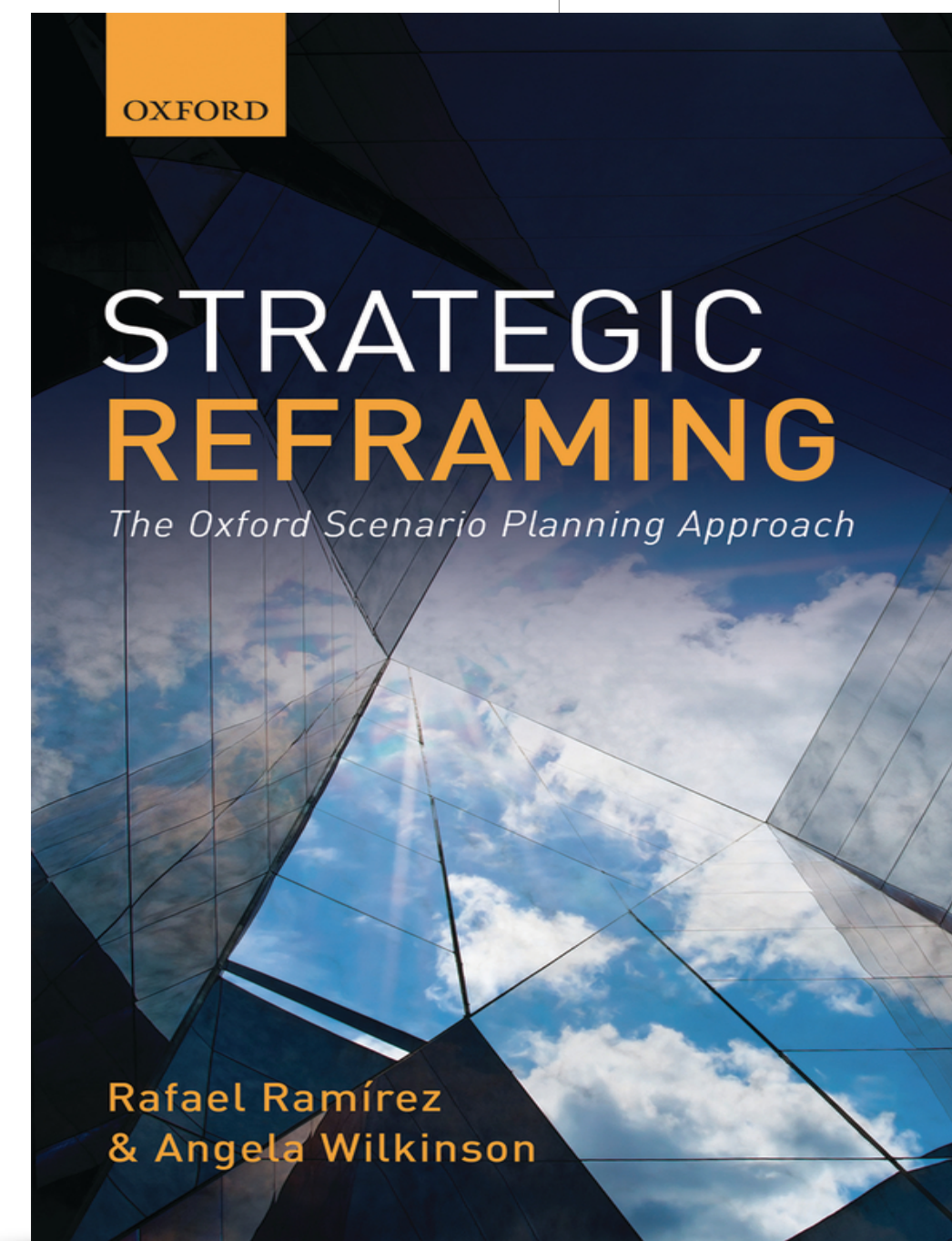
Where data becomes insight, and insight becomes
Wisdom

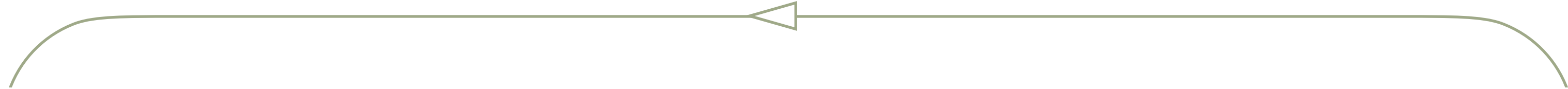


OUR FOUNDATION: BATTLE-TESTED RIGOR

Our approach is grounded in the academically validated Oxford Scenario Planning Approach (OSPA).

This evidence-based methodology was forged in the turbulence of VUCA environments and provides the rigorous foundation needed to navigate extreme uncertainty.





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The 'aspiration'



2 DIAGNOSE

The 'Where'



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HUMAN TRACK

Conduct Interviews

- ✓ **Conduct** interviews
- ✓ **Gather** industry reports
- ✓ **AI analysis** of all materials

Kick off

- ✓ **Share** interview results
- ✓ **Co create** approach
- ✓ **Define** deliverables

Analyse results

- ✓ **Combine** the results in a cause-and-effect diagram
- ✓ **Define actions** to change the causes and improve the effect
- ✓ **Cluster** the actions to fields of action

Create tech vision

- ✓ **Set** strategic posture
- ✓ **Formulate** High-Level Vision
- ✓ **Create roadmap** put the actions on a timeline
- ✓ **Co-create approach** for Phase 2.

Start phase 2

Plan Adaptive

- ✓ **Conduct ongoing** Deep dialogues on new strategic options generated
- ✓ **Be ready** to adjust your strategy as indicators change.

AI TRACK

Set Scenario scope

- ✓ **Define Scope:** Set clear boundaries
- ✓ **Set Time horizon** (short, medium, long-term)
- ✓ **Collect data** Use AI to analyze
- ✓ **Identify likely drivers of change** Pinpoint emerging trends and weak signals.
- ✓ **Driver Analysis:** Identify and prioritize key forces of change by their potential impact and uncertainty.

Create Scenarios

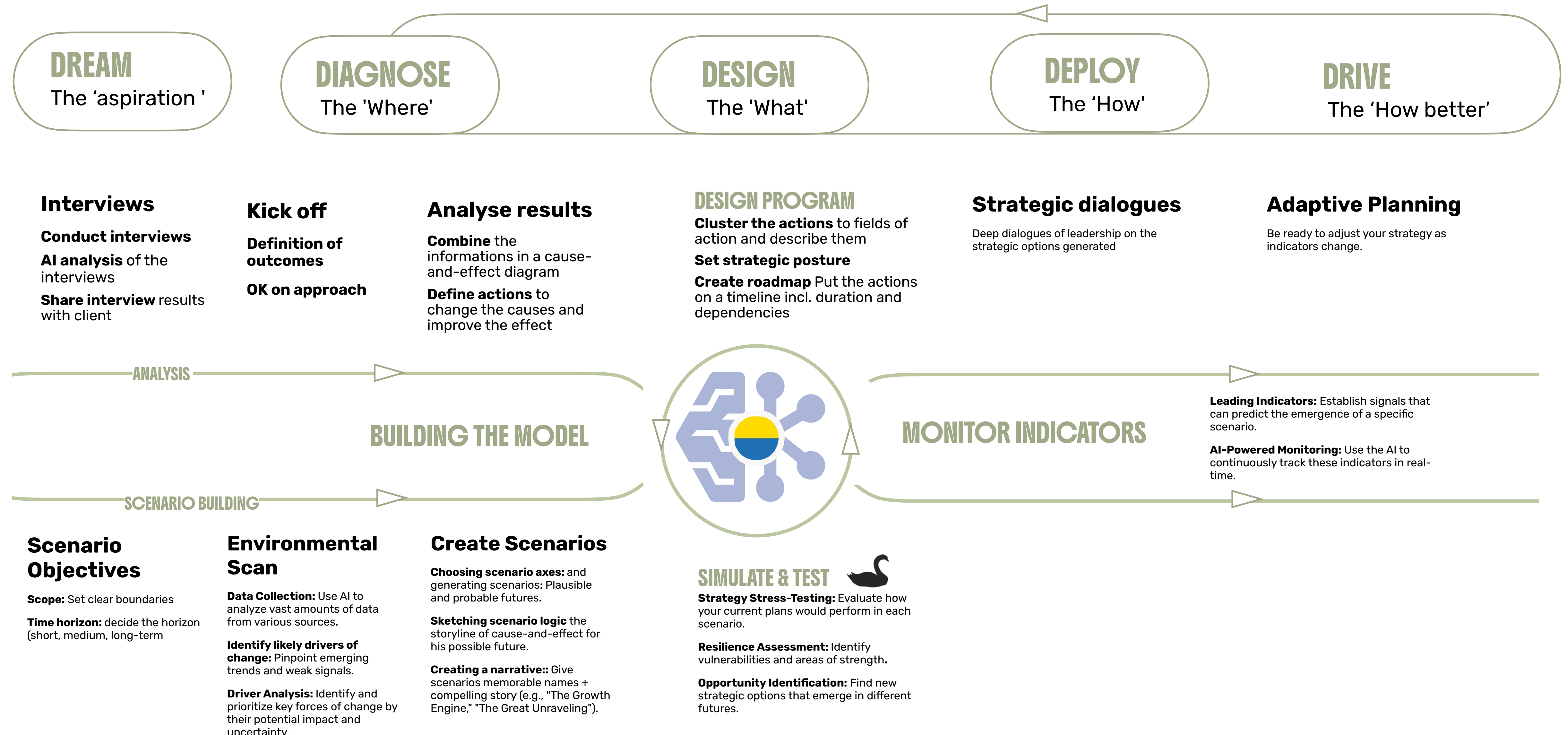
- ✓ **Choose scenario axes:** and generate Plausible and probable futures.
- ✓ **Sketch scenario logic** the storyline of cause-and-effect for his possible future.
- ✓ **Create a narrative:** morable names + compelling story (e.g., "The Growth Engine," "The Great Unraveling").

Simulate & Test

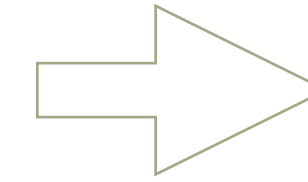
- ✓ **Stress-Test Strategy** Evaluate how current plans would perform in each scenario.
- ✓ **Assess resilience** Identify vulnerabilities and areas of strength
- ✓ **Identify opportunities** Find new strategic options that emerge in different futures.

Monitor Indicators

- ✓ **Track continuously and AI-Powered** Leading Indicators
- ✓ **Detect** signals that can predict the emergence of a specific scenario.



THE PROPOSAL



DREAM

The 'aspiration'

DIAGNOSE

The 'Where'

DESIGN

The 'What'

DEPLOY

The 'How'

DRIVE

The 'How better'

Kick-off Phase: Diagnostics & Kick-off Meeting (Sep 2025)

- **Objective:** Establish project foundation with clear understanding of current state.
- **Key Activities:**
 - gather essential information to understand the project
 - Define roles and responsibilities, and assemble the teams
 - Kick-off Meeting with Core Team:

Key Deliverables:

- High-level current state assessment
- **Agreement on methodology**
- **Desired outcome of the project**
- Project charter
- Detailed approach for Phase 1,

Outcome:

- project landscape
- desirable business change,
- project team,
- kick-off meeting,
- Proposal Refinement & Project Planning

Phase 1: Diagnostics (Approx. 1 Month: Oct 2025)

- **Objective:** Define strategic vision framework, establish baseline and define the untapped value.
- **Key Activities:**
 - Key Stakeholder Input Sessions:
 - Cause-Effect DiagramsDefine actions to change the causes and improve the effect
- High-Level Vision Formulation:
- Co-creating the approach for Phase 2.

Key Deliverables:

- Market Intelligence Summary, covering competitive landscape, regulatory considerations
- Detailed Current State and Aspired State Assessment,
- DSH Tech Vision Framework, covering digital/hardware roadmaps, AI strategy, DSH identity
- Team Development Plan for the DSH MT
- Phase 2 detailed proposal, defined in modular format with ROI rationale

- **Outcome:** A validated, high-level DSH tech vision and strategic framework, Team Development Plan for the DSH MT

Phase 2: Co-creation of Tech Vision & Roadmap (Nov – Jan 2025)

- **Objective:** Establish a high-performance DSH team and develop actionable tech vision with detailed roadmaps and team alignment.
- **Key Activities:**
 - Executive & Broader Team Vision Workshops: developing clear objectives and KPIs for both digital and hardware roadmaps.
 - AI Integration & Workforce Readiness Plan: Develop a phased AI adoption plan,
 - DSH MT Journey:
 - Addressing Cross-Functional Tensions:

Key Deliverables:

- Complete DSH Tech Vision, including a 1-year and a 5-year horizon
- Digital & Hardware Roadmaps, AI integration strategy (covering Leadership, Lab, Pioneers, Tech) a multi-year digital & hardware procurement plan
- Success Metrics & KPI Dashboard
- DSH MT Team Charter and Team Journey flip charts
- Phase 3 detailed proposal, in modular format with ROI rationale

Outcome:

A robust and actionable DSH tech vision integrated roadmaps (digital and hardware) clear AI strategy. more effective team and better performance.

Phase 3: Rollout (Starting Feb 2026)

- **Objective:** Roll out of roadmap initiatives, including building an internal AI innovation capability.
- **Key Activities:**
 - Targeted guidance during the initial rollout of roadmap initiatives,
 - Leadership: Interventions to elevate AI awareness and align leadership for key stakeholders,
 - Lab: Implement an AI-innovation engine with proven frameworks training embedding sustainable AI innovation within your organisation.
 - Pioneers: Unlock the potential of employees through interactive learning journeys
 - Tech: Data & AI Agent Platform unifying all data and deploying a multi-agent AI architectureGovernance & Review: clear quarterly and annual review checkpoints within the roadmap, with defined ownership and KPIs,

Key Deliverables:

- Implementation playbook for AI innovation
- Implemented governance structure including review cycles and steering committee
- Successful implementation of numerous value-adding AI use cases
- Further Phase 3 deliverables are to be defined in Phases 1 & 2

Outcome:

The DSH tech vision is fully integrated into business operations, AI innovation capability + sustained tech alignment throughout the BU,

TEAM & GOVERNANCE PHASE 1

LEVERAGING THE LINE ORGANISATION RATHER THAN ANOTHER STEREO

NEXT STEPS

NEXT STEPS

We propose a phased approach to co-create the vision and the path to get there:

- **Finalizing Phase 1 Approach (September):** Our goal is to use the rest of September to finalize and gain approval on the approach for the next phase.
- **Phase 1: Diagnostics (October):** We will ground our thinking in a solid foundation. We will conduct deep-dive interviews with key players to understand the strategic and technical guardrails for AI adoption. The output will be a shared assessment of the current state and a validated foundation for the next phase.
- **Phase 2: Co-creation of Vision & Roadmap (November–January):** This is where we will build the future together. Through a series of collaborative workshops, we will co-create the full DSH Tech Vision, develop actionable digital and hardware roadmaps, and tackle critical questions. The goal is a truly unified vision that everyone owns.
- **Phase 3: Rollout (Starting February 2026):** We will move from strategy to implementation. We will provide architect support and build a sustained governance structure to ensure the vision is a tangible reality.

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