ACCELERATING GROWTH BY AND FOR THE NETHERLANDS

Opportunity to join 6G Future Network Services Leading Applications

> Jos Berière, Paul Wljngaard September 2022

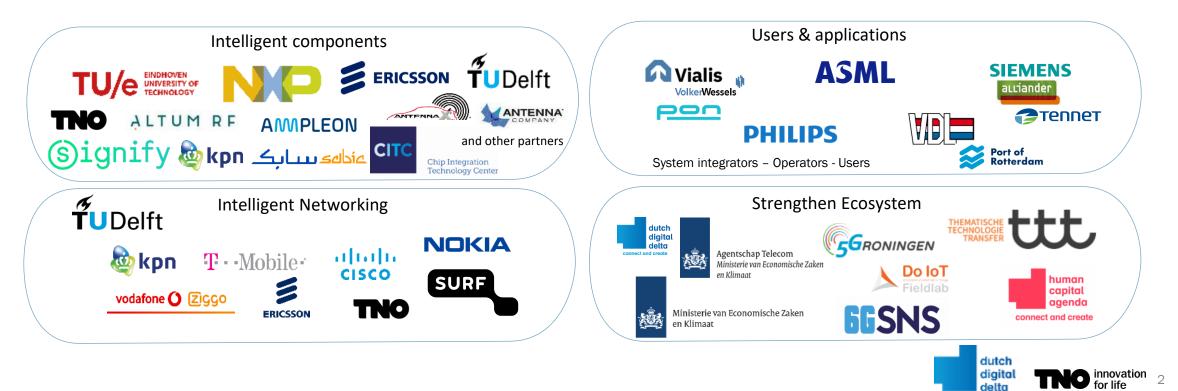




AMBITION: BUILDING A STRATEGIC AND LEADING POSITION FOR THE DEVELOPMENT AND APPLICATION OF 6G NETWORKS

By becoming a leader in the development of intelligent components and networks, and their application in the most important sectors of the Dutch economy, the future earning capacity of BV Nederland will be strengthened.

Deadline for proposal 180 mE growth fund 3 Februari 2023



connect and create

NATIONAL GROWTH FUND – 3RD ROUND

<u>6G Intelligent components and networks – Future Network Services proposal:</u>

- Proposal will follow "departmentale route" and apply for "Research, Development and Innovation" funding
- Total project size 180MEuro (including 90MEuro private participations In kind and in value/Cash)
- Project period 6 years (H2 2023 2029)
- Mix of public funding instruments (RvO, NWO, direct to partners), taking into account State Aid guidance
- Proposal for governance structure still to be drafted in line with best practices of first and second round NGF proposals

Voor economische groei en welvaart, ook voor komende generaties Budget Wie doet wat € 20 miljard Ministers van Financiën en EZK Fondsbeheerders voor de komende 5 jaar Parlement Voor investeringen in Goedkeuring begroting F Kennisontwikkeling Nationaal Groeifonds Onafhankeliike commissie R&D en innovatie Beoordelen voorstellen adviseren kabinet, A Infrastructuur monitoren voortgans Resultaten 1e en 2e ronde Kennisontwikkeling Onderzoek, ontwikkeling en Innovatie Onderwij De revolutie van de zelfdenkende 34 97 Digitaal Onderwijs Goed Geregeld moleculaire systemer 560 Digitaliseringsimpuls onderwijs NI Duurzame MaterialenNL 220 Impuls Open Leermateriaa 78 Einstein Telescop 42 & (870) Ontwikkelkracht 332 NXTGEN HIGHTECH 450 Leven Lana Ontwikkel Photondelta 471 Collectief laagopgeleiden en Landbouw, voedsel en land- en watergebruik 51 laaggeletterden Cellulaire agricultuur 60 Nationale LLO Katalysator 392 CropXR 43 Opschaling publiek private 210 Groeiplan Watertechnologie (135) samenwerking in het beroepsonderwijs NL2120, het groene verdien (110) vermogen van Nederland Totaal € 1.657 mln Werklandschappen van de toekomst (26)Life Sciences & Health **Biotech Booste** 246 Infrastructuur Oncode-PACT 325 PharmaNL 80 Eneraie en duurzame ontwikkelina Rail Gent-Terneuzer 105 Toekomstbestendige leefomgeving (100)Groenvermogen I 500 Totaal Ċ € 105 mln 200 Nieuwe Warmte Nu (100) : bedrag tussen haakjes = reservering Digitaal Ecosysteem Mobiliteit (85) en Smart City Toegekend: € 1.317 miljoen 51 Digitale Infrastructuur en Logistiek Voorwaardelijk toegekend: € 3.663 miljoer 383 Luchtvaart in Transitie Zero-emissie binnenvaart Gereserveerd: € 1.326 miljoen 50 batterij-elektrisch rotaal **€ 4.544 mln** Totaal NGF: € 6.305 miljoen

Nationaal Groeifonds



for life

3

PRESSRELEASE 26 SEPTEMBER 2022



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6G is sneller dan 5G, stabieler en kan meer dataverkeer tegelijk aan.

FOTO ANP/HH

MET 6G ALLES SNELLER EN NOG BETER TE VINDEN

Terwijl 5G nog niet eens volledig is ingevoerd in Nederland, werken onderzoekers alweer aan de volgende standaard voor draadloze datacommunicatie 6G, die vanaf 2030 moet worden ingevoerd. Wat kunnen we verwachten?

Wat is er mis met 5G?

Het kan altiid nog sneller. stabieler en met grotere hoeveelheden data. En wat de telecomsector graag wil toevoegen met 6G, is dat daarmee ook tot op een paar centimeter precies de plaats kan worden bepaald van apparaten die met het netwerk zijn verbonden.

Waarom willen ze dat? Net als 5G, wordt 6G vooral ontwikkeld met de gedachte in het achterhoofd dat steeds meer apparaten online met elkaar verbonden zullen zijn, waaronder zelfrijdende auto's, smarthome-netwerken of robots die de boel op straat schoonhouden, in de landbouw of in industriële omgevingen werken. Huidige plaatsbepalingsmethoden als gps zijn soms ontoereikend voor dat soort doeleinden.

Wat kan 6G nog meer?

Net als zijn voorgangers 1G tot en met 5G is 6G weer sneller, stabieler en kan het meer dataverkeer tegelijk aan. Daarvoor maakt het straks onder andere gebruik van nog hogere frequentiebanden dan 5G. Omdat dat ook meer energie vraag of er geen aparte Chiook slimmer worden en uitwisseling van technologaan zendstations onder gie tussen dat land en het

andere hun signaal niet als een grote lamp in het rond stralen, maar als een spot zich nog preciezer richten op de telefoon of een ander apparaat dat ermee verbonden is.

vragen

Hoe komt zo'n standaard als 6G tot stand?

De standaarden ziin afspraken over allerlei specificaties en technische protocollen, zodat alle apparaten die eraan voldoen

zonder hobbels met elkaar kunnen samenwerken en communiceren. Grote telecomproviders en fabrikanten uit de hele wereld stellen eerst samen vast waar ze denken dat behoefte aan is en wat haalbaar is, en gaan daarna bakkeleien welke technieken ze daar precies voor inzetten. Bij 4G en 5G kwam daar een wereldwijde standaard uit, maar bij 3G waren er nog verschillen tussen Europese specificaties en die in de Verenigde Staten, zodat niet alles over en weer werkte. Deze keer is het de kost, moeten de netwerken nese standaard komt, nu de

Westen onder druk staat.

Kan Nederland daarin nog een rol spelen?

Nederlandse onderzoekers hopen van wel. Een van de technologieën waarover afspraken moeten wor-

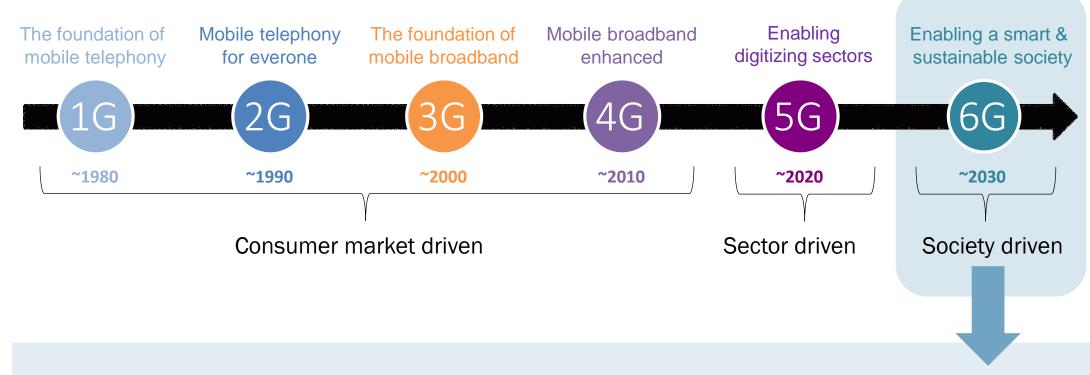
den gemaakt, is het gebruik van bepaalde chip- en antennetechnologie, waarover veel kennis is in ons land. Een consortium met TNO, de technische universiteiten van Eindhoven.

Delft en Twente en bedrijven als NXP. Signify en Ampleon dienen binnenkort samen met het ministerie van Economische Zaken en de Topsector ICT een voorstel in bij het Nationaal Groeifonds om 180 miljoen euro te investeren in de ontwikkeling van technologie die kans maakt de wereldwiide standaard voor dat deel van 6G te worden. Van dat geld moet de helft van de overheid komen, de helft komt uit de particuliere sector. Of dat uiteindelijk ook lukt, hangt af van de standaard waarvoor uiteindelijk in het wereldwijde overleg tussen partijen wordt gekozen.

Wouter van Bergen



THE FUTURE STEP BEYOND 5G WILL NOT BE BUSINESS AS USUAL



Stakes / impact on society has become too high for individual organizations in new geopolitical landscape

- Digital sovereignty: creation points of control and prevent strategic vendor and geopolitical dependencies
- Reliability: technical availability, control and trustworthiness to prevent public or national disruption
- Sustainable: energy consumption and footprint within societal goals

WORLDWIDE 6G ANNOUNCED GOVERNMENT GRANTS 6G IS DEEMED A TECHNOLOGY OF STRATEGIC IMPORTANCE



'21 Ericsson CEO warns of Chinese advantage if 6G standard splits - as this failure would be disadvantageous for Europe

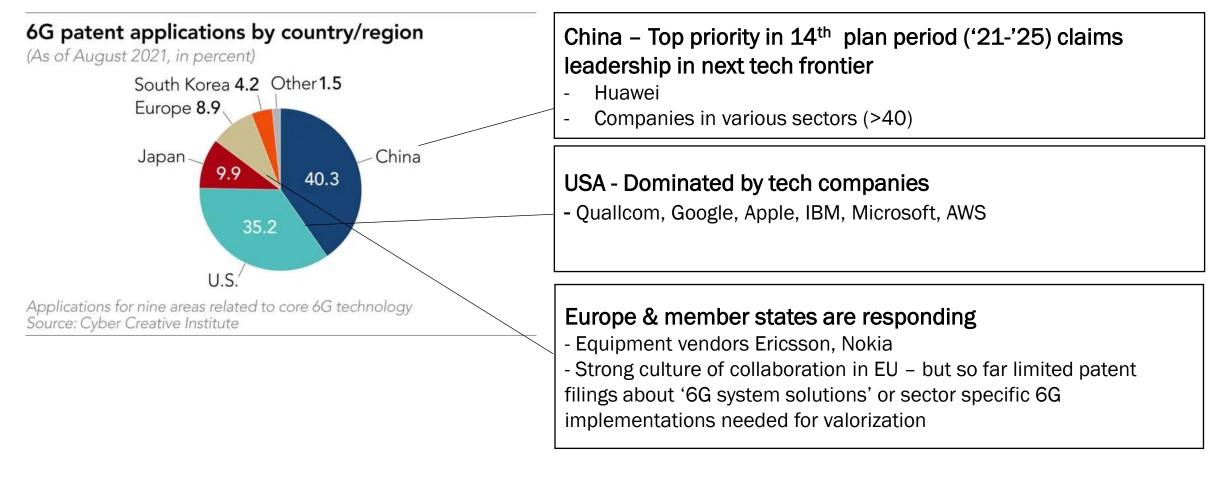
FLAGSHIP

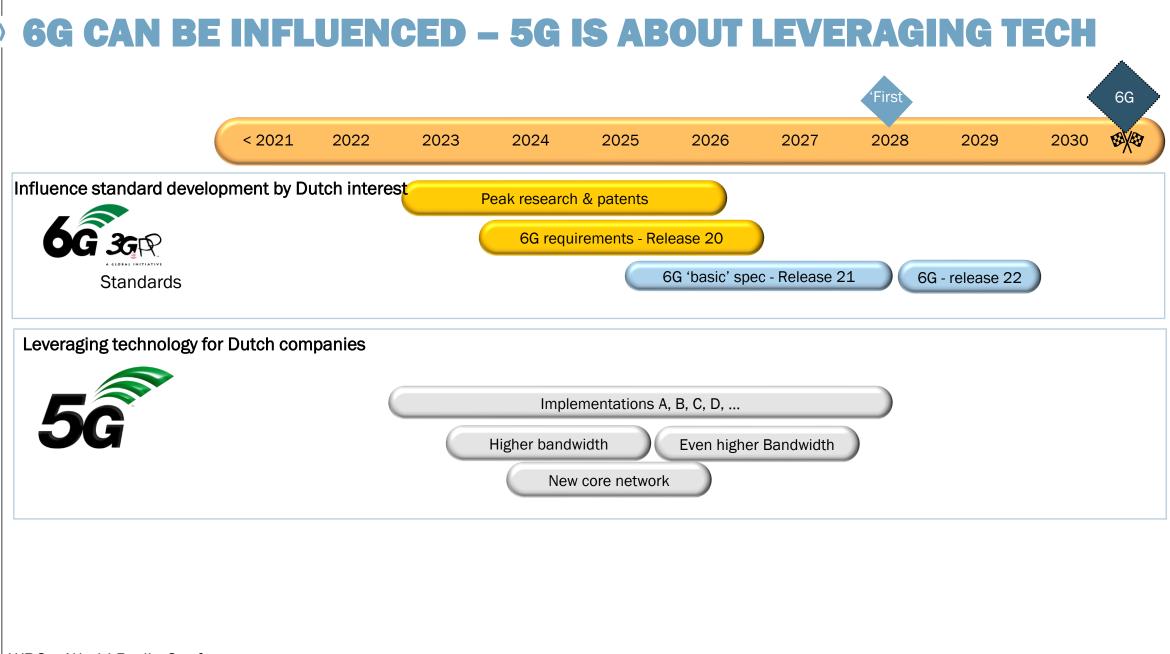
290mE

700mE

500mE

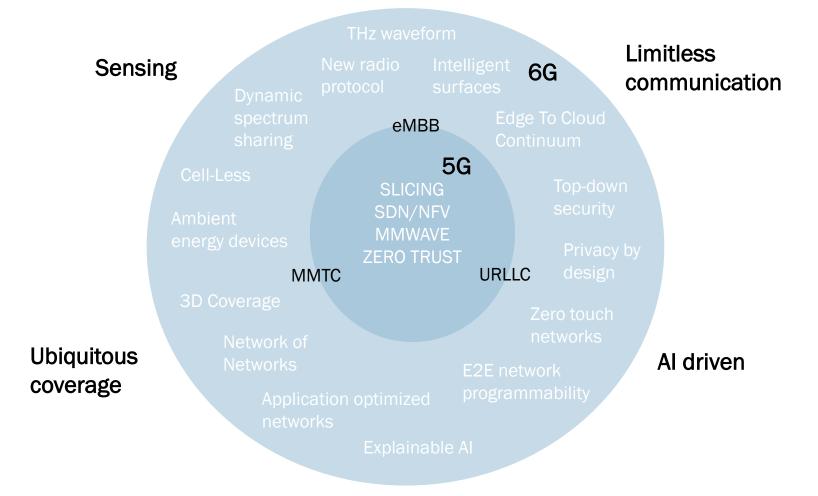
EU IS RESPONDING TO CHINA & USA LEAD IN PATENT FILINGS THIS IS A PRELUDE 'STANDARD ESSENTIAL PATENTS' ONLY MATTER





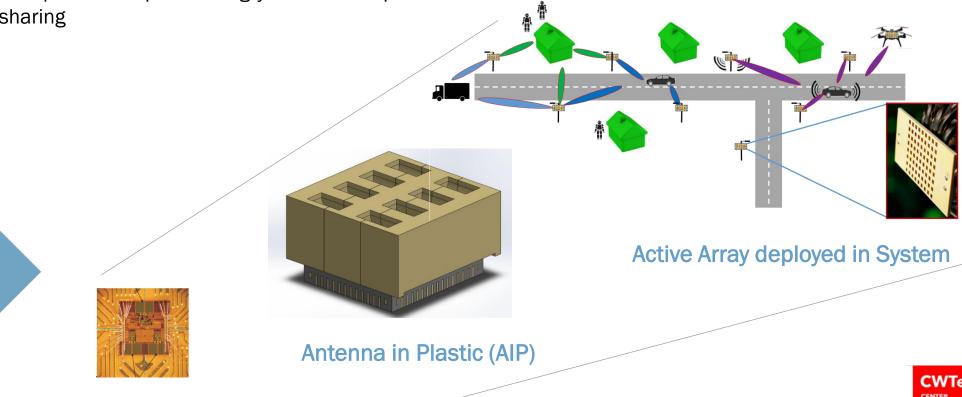
WRC = World Radio Conference IMT = International Mobile Telecommunications

6G: AI DRIVEN MOBILE NETWORK FOR SUSTAINABLE, RELIABLE, LIMITLESS COMMUNICATION & SENSING



PROGRAM LINE 1: INTELLIGENT COMPONENTS

- 6G will use mm-wave frequencies up to 100 GHz and beyond
- Software antennas are required to enable distributed Massive-MIMO
- Highly integrated concepts are required
 - Existing concepts are too power hungry and far to expensive
 - Aperture sharing



Software antenna integrated on chip



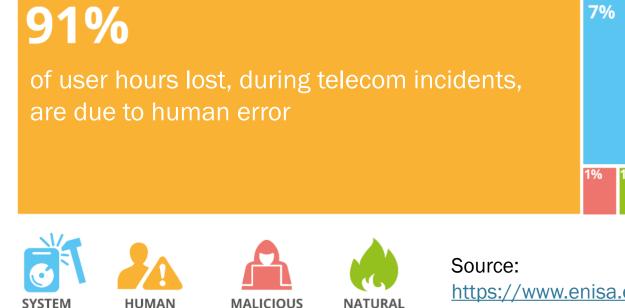
PROGRAM LINE 1: EXISTING ECOSYSTEM, LARGE EU 5G/6G COMPONENTS





PROGRAM LINE 2: CHALLENGE COMPLEXITY

• Complexity of operating communications networks has been growing with every new generation



PHENOMENA

Source: <u>https://www.enisa.europa.eu/publications/</u> telecom-security-incidents-2021

• Complexity blocks digital sovereignty!

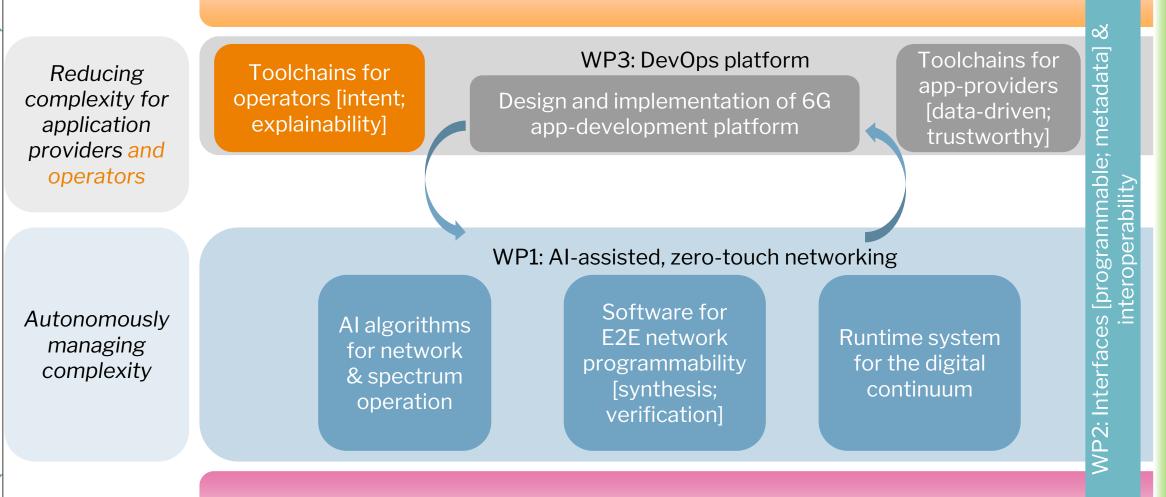
ACTIONS

ERRORS

FAILURES



PROGRAM LINE 2 – OVERVIEW (UNDER CONSTRUCTION!) Leading applications



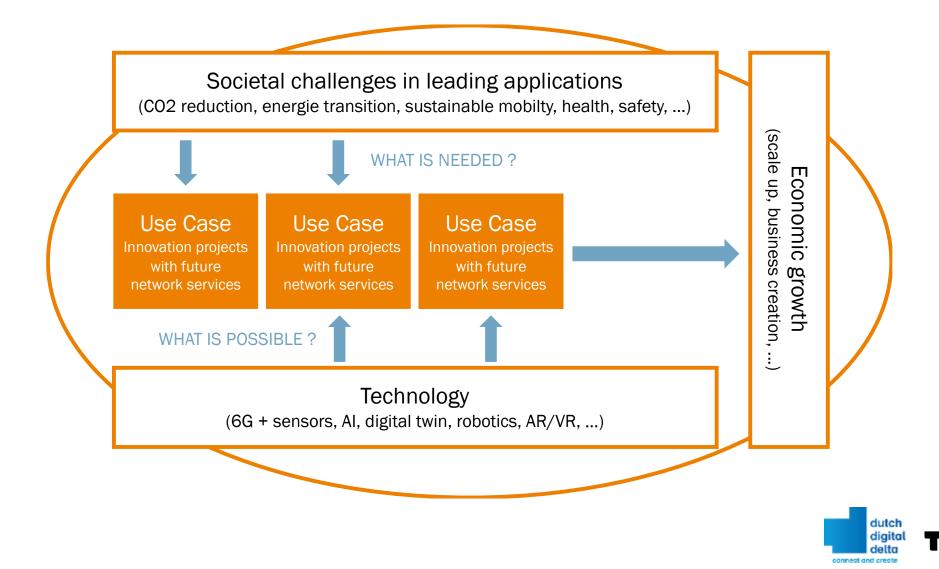
Intelligent Components

Ecosystem

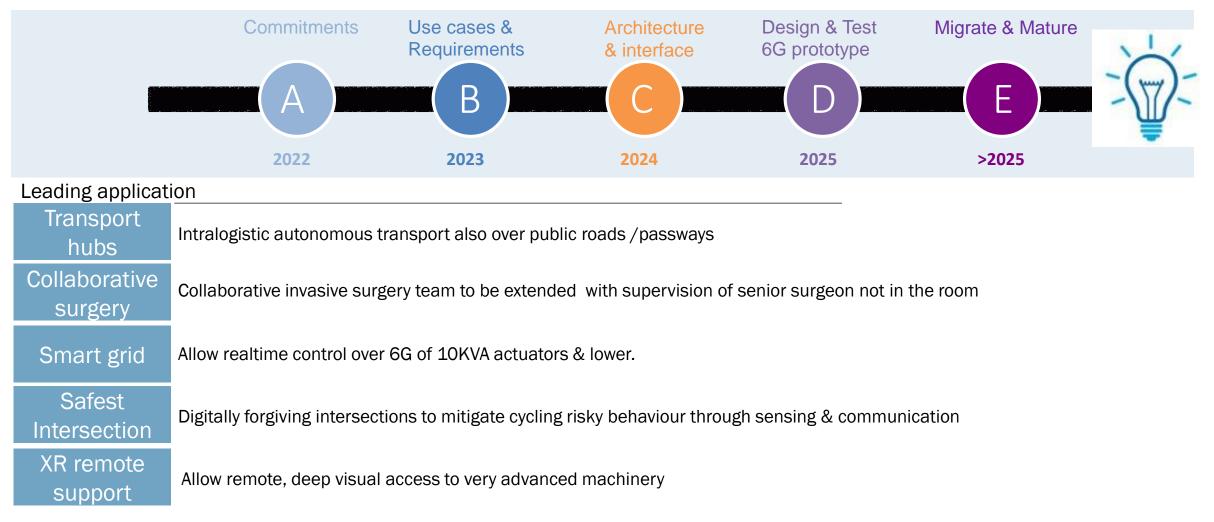
EXAMPLE 6G POSSIBILITIES AND REQUIRED CAPABILITIES

	Possible application area's	Limitless ommunication	Al driven	Ubiquitous Coverage	Sensing & interaction
	Interactive Massive Twinning	X			Χ
	Holographic communication	X			Χ
₽₽₽ ₽₽₽₽	Robots swarms & co-bots	X	X		
$\sqrt{2}$	Bio sensors		X	X	
	Environment sensing		X		X

PROGRAM LINE 3 – LEADING APPLICATIONS

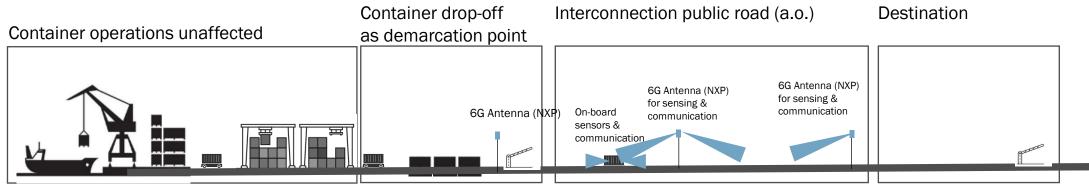


PROGRAMLINE 3: LEADING APPLICATIONS & TIMELINE



6G network components, intelligent network & test Facilities from programline 1,2,4

TRANSPORT HUBS: AGV FOR INTERCONNECTIONS 6G SENSING TO ALLOW SAFE PASSAGE OVER PUBLIC ROADS



Logistics chain require increasing automation to improve efficiency, uptime and for labor shortage Further optimization can be achieved if public road can be used by AGV to reach the destination

KEY TECH - 6G SENSING & COMMUNICATION UNDER DEVELOPMENT BY NXP / NOKIA-ERICSSON*

- Affordable standardized sensing of people, bikes, cars – but also for AGV / terminals

- This in conjunction with its onboard sensors to <u>allow safe passage on public roads</u> by various AGV as the technology is standardized

INTRODUCTION

- Having a clear drop off / on point on the terminal as it allows operations to be unaffected (similar to train)

- On the path could be airports tele-operated or for very predictable shifts ('offload')

* JCAS – Joint Communication and Sensing Unpacking joint communication and sensing in 6G - Erics

application optimisation	
limitless capacity	
ubiquitous coverage	
Al driven reliability	
zero-energy devices	
3D coverage	
precise localisation	
sensing	

IMPROVING LIVES IN 2030 1,2 SHARED 3D MENTAL MODEL OF PATIENT IN SURGERY



Use case: Shared 3D mental model of patient in surgery

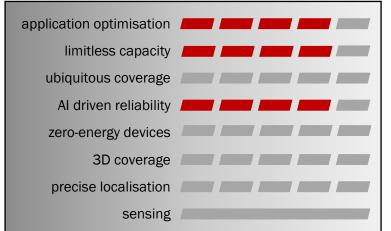
- In ageing population, increasing complexity of surgery & scarcity of specialists supervised surgery by medium specialists (and later supported by robotics)
- Advanced pre-op planning & visualization (tasks) is also a foreseen digitization step

6G requirements:

- > Cloud continuum
- > Advanced H2M interaction
- Al driven reliability

-) MMTC
-) URRLC

- Access to cure increasingly is tougher, especially outside cities / lower income while treatments are becoming increasingly complex and specialized
- Investment is done in robotics, AI & 6G where remote surgery capability is a 'moonshot', requiring the extremes of future technical capability / surgery procedures. A more manageable step forward would be a 3D shared mental model using either holographic interactive display and/or advanced glasses
- Still, this moonshot paves the way of lower cost equipment in operating theater offloading more advanced software capability in the cloud and facilitates adoption of 3D, light weight digital user equipment (AR / VR), haptic gloves, advanced (realtime) data processing.



EXAMPLES ONLY FOR DISCUSSION

SMART GRID – GRID MONITORING AND CONTROL CONTROL OF ENERGY-NETWORKS NEEDS HIGHEST RELIABILITY



Source: Hyve Power

- Balancing the energy networks is becoming more and more difficult in access
- Currently, there are limited options to control both supply and demand centralized solutions or those directly communicate to endpoints are not feasible
- Situational awareness and decentralized optimization in access grid will make a difference.

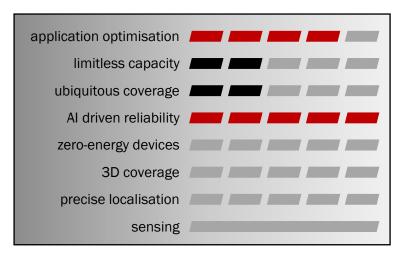
Use case: monitoring and control of the energy access network

- Decentralized monitoring and control of energy balance, frequency, quality between substation & buildings (EMS) through clear demarcation
- > Ultra-high reliability is needed, and in certain situations (very) low delay

6G requirements:

- > Ultra-reliability
- > Cloud-Continuum
- > Zero-energy devices

- > Edge compute (privacy)
- > Slicing (security)



TRAFFIC – INTERSECTION SAFETY 6G SENSING CAPABILITY BRINGS NEW OPPORTUNITIES



Source: Smart2Zero

Intersection of the future with sensing capability

- Provide cooperative detection of non-connected road users; cyclists, pedestrians with network & vehicle to provide warning towards driver to increase safety
- Allow (partial) substitution or enhancement of traditional sensor in tarmac for detection to reduce cost and time to repair.
- Allow high capacity exchange of data of vehicle and other users to allow direct interaction & decisionmaking to allow optimum traffic management

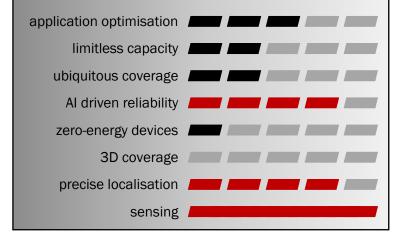
6G requirements:

) Sensing

> Localisation

> Edge to Cloud / Reliability

- > Low delay networking
- > Edge computing



- Y Today majority of detection is done by tarmac based sensors which do not provide context (how many cars), intent (where does someone want to go) and only provides information if triggered (e.g. pedestrian does not use the switch).
- > Upcoming alternative is the use of camera's with AI to overcome these limitations.
- 6G sensing promises several advantages, higher cost-effectiveness, native privacy (sensor is not able to detect person or vehicle distinct features) and futureproofness as it allows interaction with connected person / car which is the long term vision.

REMOTE XR SUPPORT LEVERAGING 6G FOR NATIVE INTERACTIONS WITH DEEP INSIGHTS



High Fidelity XR remote support

 Provide natural XR interaction with remote systems of customers (different domain) with deep insight into system

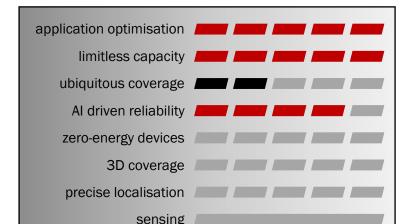
6G requirements:

Trusted connection

Edge to Cloud / Reliability

-) Low delay networking
-) Edge computing

- COVID accelerated the use of remote support, where previously an expert was flown in.
- But there are still many limitations to be addressed collaboration with various parties, quality of the interaction & deep insights into the systems
- > Al these improvements in factories (abroad) need to be done in secure, reliable and clear verifiable way (legal).



UTURE NETWO RKSERVI

Professor in Electromagnetics /

Antennas at University of Eindhoven,

Dean of the Department of Electrical



Peter Rake Program Manager

LinkedIN

Leader of 5Groningen program in the last 6 years on behalf of Economic Board Groningen. Collaboration in 5G fieldlab with renowned telecom operators, international vendors and Tier 1 research institutes. Prior to this position, Peter was engaged as ICT manager at KPN for 20 years.



Engineering

Bart Smolders Intelligent Components LinkedIN



Leading TU Delft's Lab on Internet Science, whose research revolves around understanding and improving the performance and reliability of Internet and communications infrastructures

LinkedIN

Fernando Kuipers Intelligent Networking Jos Berière Leading Applications LinkedIN

16 years mobile Operator experience. Within KPN overall responsible for 5G launch in the business market. Led operations for customer & vendors tenders, customer trials, standardization and multi-billion spectrum auctions & leases. Recently supporting the NGO SmartParks.



Lenneke de Voogd

Ecosystem LinkedIN

Over 20 years of experience in innovation, setting up public-private partnerships for R&D in collaboration with knowledge institutes, companies and government. Within TU Delft I am business developer at the Innovation & Impact Centre and Programme manager for Do IoT Fieldlab.

Over 20 years of experience in communication network architectures and business ecosystems, with a focus on interoperability. Senior consultant at TNO in digital infrastructure projects: 5G field trials, net neutrality and roaming for business customers, EU projects and government.

LinkedIN

Pieter Nooren

Program Strategy



Paul Wijngaard Partnership manager LinkedIN

32 years of working experience in communications network industry both at operator and technology vendor side. In depth relationship network in industry and leading roll in sector. Within TNO ICT responsible for Telecom market segment and focus on topics like 5G/6G, Intelligent networking, Edge cloud, IoT



Ramon Rentmeester Sr Policy manager

LinkedIN

16 years of working experience with the dutch Government, first as a consultant at RVO for European Research & Innovation Programs and since 2014 at the Ministry of EZK. Currently responsible for areas like: Spectrum, Security and continuity and Research & Innovation 5G/6G



THERE IS NO PLACE LIKE HOME TRUSTED BIO-SENSING Use case: provide



Use case: providing safety @home for elderly

- Elderly can have biometric monitoring with minimal pervasive devices supported by sensing of mobility & heart/respiration
- > Patient care can act based on much larger data set

6G requirements:

- > Trust & self learning reliability
- Sensing
- Cloud Continuum
- Ubiquitous coverage

5G requirements:

> MMTC

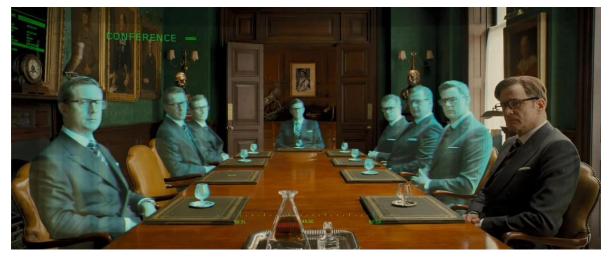
Source: Hyve Power

- > Elderly are staying longer at home increasingly requiring care
- Existing biometric wearables or sensing are intrusive, lack coverage / easy integration in every home
- 6G offers promise of zero power sensors, self learning reliability and non intrusive sensing compared to cameras

application optimisationImage: Sensinglimitless capacityImage: Sensinglimitless capacityImage: Sensinglimitless capacityImage: Sensinglimitless capacityImage: Sensinglimitless capacityImage: Sensing

EXAMPLES ONLY FOR DISCUSSION

NEXT LEVEL COLLABORATION 'VIRTUAL TELEPORTATION'



Source: Kingsmen movie

Use case: fully holographic communication

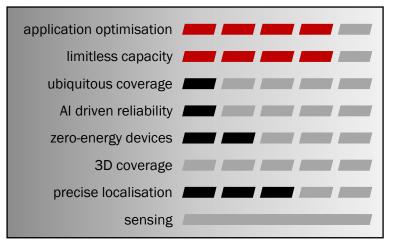
- > High bandwidth and low latency required for realtime communication
- > Lightweight devices require energy efficiency for full-day use
- > Haptic devices can further enhance experience

6G requirements:

> Ultra-high bandwidth

- 5G requirements:
- Edge computing

- **)** Ultra-low delay
-) Cloud continuum



- XR communication is starting to appear, AR glasses are getting better
-) There are still performance bottlenecks for full holographic communication
- Good edge computing support requires massive bandwidth for holographic streams
-) Domain of both big tech industry and small startup companies

FACTORY OF THE FUTURE – INDUSTRY 5.0 COMPLETE DYNAMIC MANUFACTURING



Source: Bloomberg news

- > Factories are typically static, designed for making certain products at scale
-) More and more versatile robots are used
- > Ultimately, using only mobile robots allows for highly customizable factories
-) This requires industry and telecom operators to work together closely

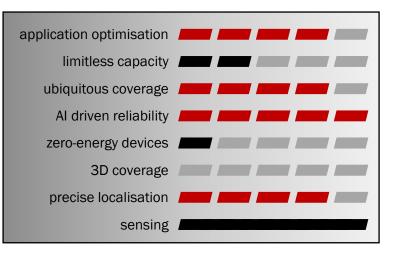
Use case: fully customizable factories

- Mobile robots for internal logistics and manufacturing
-) Tracking and correcting vehicles & drones in realtime

<u>6G requirements:</u>

- Trusted & self-learning connectivity
- Sensing
-) Edge to Cloud
-) Limitless capacity

-) URLLC
 -) Edge computing
 - > Private / Slicing (security)



EXAMPLES ONLY FOR DISCUSSION

TRAFFIC – MASS TELE-OPERATED DRIVING & FLYING REMOTELY MONITORING AND CONTROLLING VEHICLES & DRONES



Source: T-Systems

- Full autonomous driving is still far away, but guite possible for parts of a route
- More drones are foreseen in delivery, surveillance
- Tele-operation of vehicles is a step towards fully autonomous vehicles, taking over when needed
- This requires cooperation from car manufacturers, but also new companies offering remote driving services

Use case: remote operator drives or flies

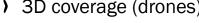
- > High bandwidth / low latency connection is needed
- High reliability is essential, although vehicles may often cope (temporarily) themselves

6G requirements:

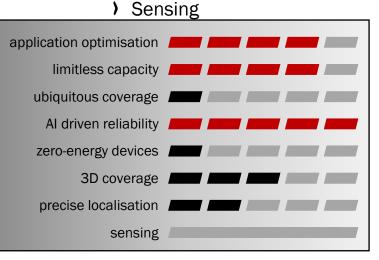
Low delay)

) 3D coverage (drones)

- High bandwidth
- Ultra-reliability



) Localisation



INDOOR/OUTDOOR LOGISTICS - AUTOMATION PRECISE LOCALISATION, MASSIVE MTC AND ULTRA-RELIABILITY



Source: Starship

- > Fully autonomous logistics is the ultimate solution for many logistic challenges
- > Sidewalk robots are a big step, but are not yet fully autonomous
- > Massive autonomous logistics will require some form of network support
-) Specialized robot companies compete here with big tech companies

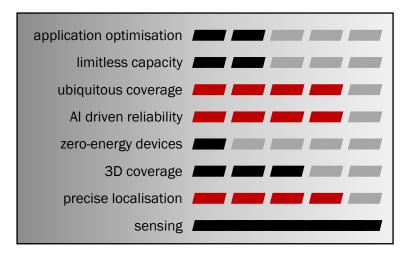
Use case: (small) semi-autonomous vehicles & drones

- > Monitoring and control of semi-autonomous vehicles
-) Tracking and correcting vehicles & drones in realtime

6G requirements:

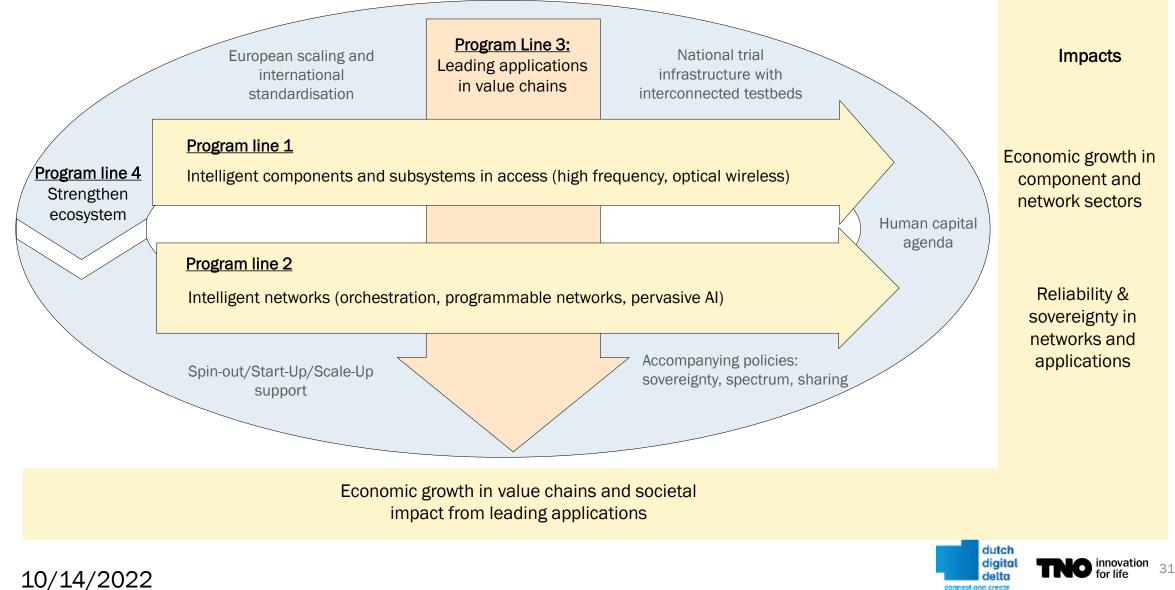
-) Precise localization
-) Ultra-reliability
-) Massive IoT

- > Low delay networking
-) Edge computing



ORGANIZATION FUTURE NETWORK SERVICES PROPOSAL

RESEARCH & DEVELOPMENT AND INNOVATION



connect and create

DEVELOPMENT IN DUTCH MOBILE INNOVATION HUB

THE FIRST NATIONWIDE MOBILE NETWORKING TEST CENTER & DEVELOPMENT COMMUNITY

Todays' limits regional fieldlabs are to be adressed

- Fragmentation
- Limited pre-commercial HW & SW
- Ease of access / environment
- Linkage regional / national / international / global
- Limited human capital

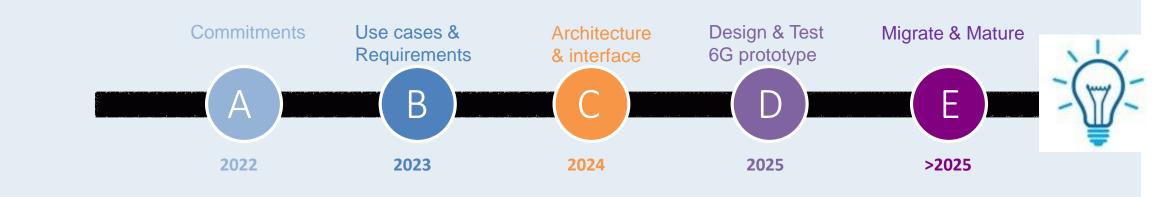
Global impact on standards

Embedded in Europe Flagship projects

Founding of Dutch Wireless Network Test Center & Innovation Hub



LEADING APPLICATIONS ROLES



User group platform – driving 'impact' & supply requirements

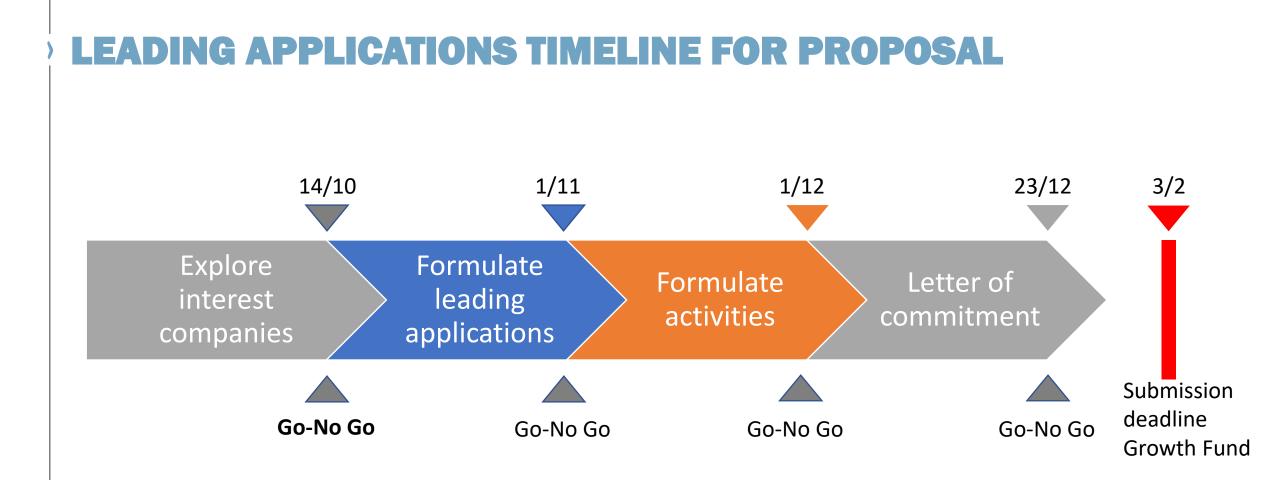
- Driving requirements → input & feedback on workpackage progress, definition
- (optional) First organizations to test, validate demonstrators / facilitated by programline line 4
- Participation #6 one-day meetings per year + preparation & feedback [minimum 200 hrs / yr)

Leader - workpackage & developer - key for 'outcome'

- Definition of scope workpackages, managing progress
- Long term perspective (patents / IPR etc)
- Potential to scale / impact on at least EU level sufficient (development) capacity indicative >2 #FTE

(Deep tech) Unicorns

- Development of extension, enhancement or ('niche') module
- Dev. / integration capacity > #0.25 FTE



innovation for life

COLUMN CONTRACTOR

THANKS FOR YOUR TIME

frinninger fr Erteffe

14-10-2022 Jos.beriere@tno.nl