war and wonder cycles to identify points of change. In this case, we can take the automotive industry map rolled forward to 2025, add our weak signals for those points of war and try to determine what will rapidly be changing in the industry at that time. We can then look at the players in that market, try to identify opportunities to exploit or even looking at nation state gameplay.

In the case of the automotive industry, I've marked on the points of war that will be occurring (or would have just occurred) by 2025 and then added on the gameplay of China in that space. This is provided in figure 245. What it shows is that China is undergoing significant strategic investment in key parts of the value chain prior to these points of industrialization. It is also building a strong constraint based form of gameplay around raw materials by acquiring significant assets in this space. If you overlay the Chinese companies in the market and then run a similar exercise for the US then what emerges is quite surprising. Whilst many have assumed that this future will be dominated by US and Silicon Valley companies, it looks increasingly likely that the future of the self-driving car belongs to China.

Figure 245 — Automotive, points of war and gameplay