
FRENCH STARTUPS
are reinventing
AUTOMOBILITY
FRANCE
AUTOTECH

FRENCH STARTUPS ARE REINVENTING **AUTOMOBILITY**

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FRANCE AUTOTECH

MICHAËL FERNANDEZ-FERRI

President and co-founder of France AutoTech

Due to environmental requirements, technological breakthroughs and changes in society, it feels like the end of an era for the car as we know it. After having shaped our economies, our lives and our landscapes for over a century, has the time really come to steer it back into the garage? Probably not. The car is still pretty much indispensable so it will just have to adapt to the challenges of this new era and, in doing so, redefine its role and characteristics among a broader range of mobility services: what we call automobility.

In France, nearly 300 startups are busy creating a new, optimised, responsible travel model. Their projects include vehicle connectivity, self-driving vehicles, electric mobility, new uses and the digitalisation of services, and they all share the same belief: the motorist as a user must remain their central focus.

The France AutoTech association was founded in 2017 around this common human denominator, an unquestionable prerequisite for the acceptability and interoperability of solutions. France AutoTech, a vertical offshoot of French Tech, dedicated to the future of the motor car and its uses, was welcomed both by the ecosystem, which was keen to structure itself, and by the public authorities, who immediately lent us their support. France AutoTech particularly wishes to thank the Secretary of State for the Digital Sector, Mounir Mahjoubi, for his commitment to our organisation.

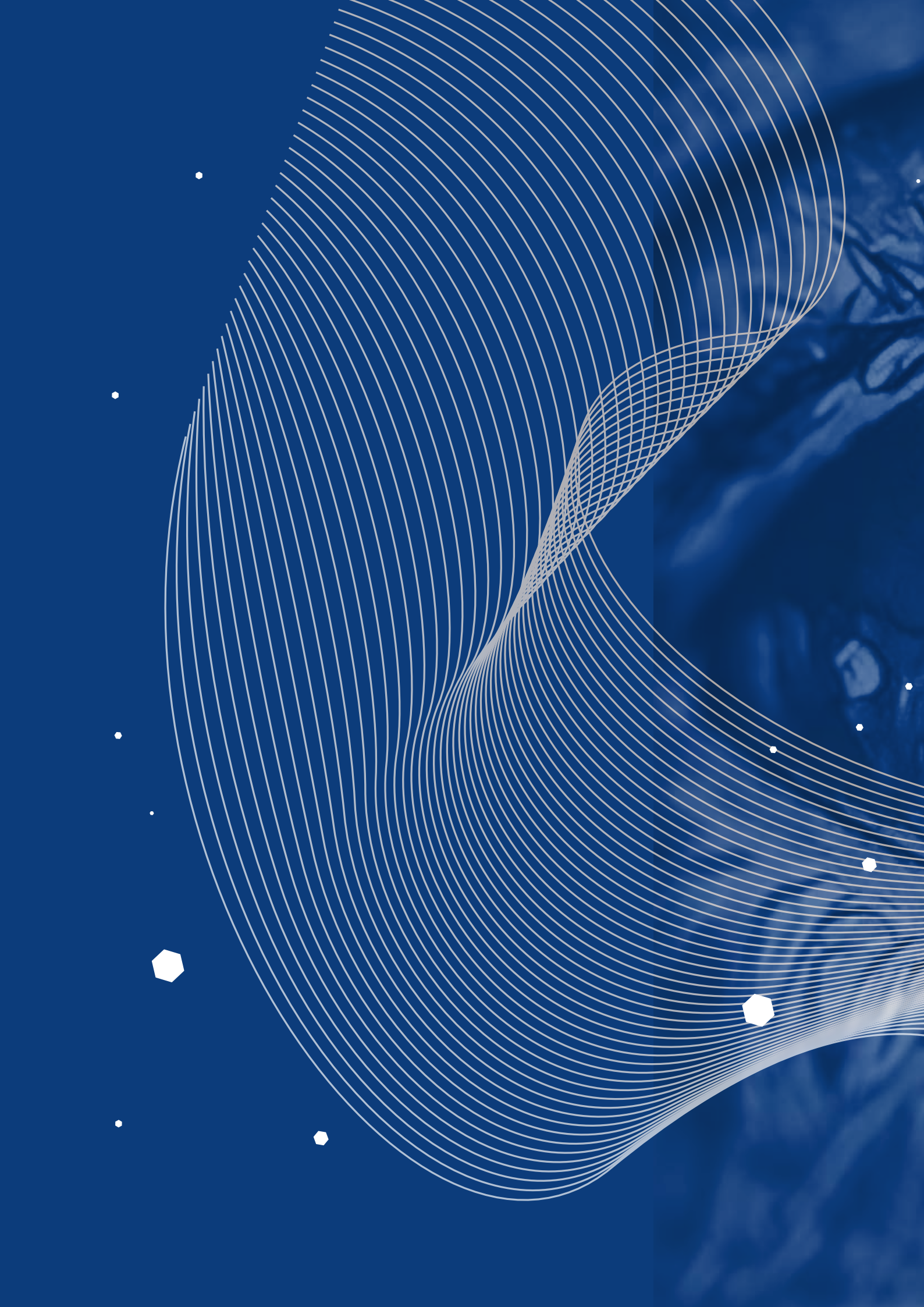
The startups that have joined France AutoTech have a clear vision but, more importantly, they share the same values.

There is something of a paradox when we think that an increasing number of AutoTech firms are emerging at a time when the car remains unused for an average 96% of its life cycle. With that in mind, our charter, inspired by #TechForGood, states our intention to innovate for the greatest number, as well as our concern for the environment, road safety and unrestricted, secure access to vehicle users' personal data. Our shared goal is to improve the day-to-day experience for motorists so a responsible use of car continues to play a role in future transport systems.

The strength and legitimacy of France AutoTech are derived from this convergent approach, shared by our members regardless of how diverse their activities are, and enables us to successfully pursue our three main goals. Firstly, to represent and federate the ecosystem, and establish the association as a point of reference, particularly with an eye to the development of the future regulatory, fiscal and normative framework for automobility. Second, to foster synergies between members and/or with large companies to stimulate, accelerate and disseminate innovation. Finally, to communicate our know-how to professionals and the general public, and share our passion with them.

This foward-looking analysis has been produced in collaboration with our partner Capgemini and contributes to this final objective. The ecosystem is now buzzing with activity, initiatives are multiplying and innovation is accelerating, so it seems the ideal time to take stock and compile a set of visions on automobility. The paper confronts the views of disruptors and sector experts to provide a snapshot of the AutoTech ecosystem at a pivotal stage in its existence, as it is about to move on from the profusion of ideas to become a structured, dynamic force determined to shape automobility for the future.

Hey, AutoTech companies, let's hit the road!



9 VISIONS OF THE FUTURE

Airing views on automobility

1

AUTOTECH IS ONE OF THE SPEARHEADS OF FRENCH TECH

MOUNIR MAHJOUBI
Secretary of State for the Digital Sector, reporting to the Prime Minister

> ***Today, this is a French ambition, tomorrow it will be European. We will accomplish it together***

SINCE ITS CREATION, THE FRENCH TECH HAS BEEN SEEKING TO DEVELOPING FRENCH STARTUPS.

French Tech was founded to help French startups get into business and it has been successful, having contributed to the emergence of an ecosystem harbouring more than 10,000 startups from across the country. Now, however, we need to take things further. With Horizon French Tech 2022, our goal is to move on from the incubation stage to take off and make the French startup ecosystem the benchmark in Europe. We are also keen to encourage initiatives that federate stakeholders in every sector of our economy.

Take the transport sector, for example, where we have chosen to back the France AutoTech initiative. We are counting on France AutoTech's startups to reinvent and rejuvenate the automotive industry, which is built on well-founded expertise.

Together, these companies intend to transform the daily lives of 40 million French motorists, respecting a charter of responsibility that reflects the principles of #TechForGood: road safety, environmental respect, personal data protection, transparency and trust in services, affordability, and the development of individual mobility solutions that respond to every citizen's right to travel where they want, when they want.

Today, this is an ambition for France but we will take it to a European level in the future. AutoTech companies, start your engines!

2

AUTOMOBILITY IS BRINGING ABOUT A REVOLUTION IN SOCIETY

THIERRY PEUGEOT
Former chairman of the Supervisory Board at Peugeot S.A.
Vice-President of Etablissements Peugeot Frères.

> ***Being able to let go of the steering wheel is likely to have some major impacts, to transform society even...***

We sometimes forget what an incredible breakthrough the motor car was in the beginning. For the first time in history, we could unhook the carriage from the horses! Over the next twenty years, everything changed: the horse sector was radically disrupted, towns and cities reshaped, new businesses emerged while others, some of which were much older like Peugeot, reinvented themselves.

We could well see a similar revolution with the introduction of driverless cars. The simple fact of being able to let go of the steering wheel is likely to have some major impacts, to transform society even, and it is still hard to envision or anticipate all its consequences. We will probably see the development of more responsible driving with fewer accidents, less noise and lower emissions with electric engines, as well as new mobility solutions, and greater freedom and independence for isolated or elderly people.

Being freed from the steering wheel may even alter the pace of our daily lives because the time spent in the car could be used to work, relax or for leisure pursuits. How we will spend this time really is the big question as digital operators will no doubt be clamouring to exploit this new 'downtime'.

Carmakers, especially in France, are far from feeling defeated as they boast a number of assets: a long-standing culture of innovation, the capacity to mass produce highly complex products that remain very reliable, which will always be the number one requirement, and first-rate design skills. They also know motorists better than anyone else. The car may be able to drive itself, but it will be important to let the driver take back command at any time, so they can still enjoy the pleasure of being at the wheel of a classy car.

3

THE REAL BREAKTHROUGH WILL COME WITH ROBO-TAXIS AND LEVEL-5 SELF-DRIVING VEHICLES

GUILLAUME PAOLI
Associate director, AramisAuto

> ***Private cars still have a bright future ahead***

Every year, AramisAuto runs a major survey on French people and their cars. The 2018 survey was conducted with Kantar TNS and shows that, for a very large majority of them, the car remains essential. Almost nine out of ten French people use their car at least once a week and six out of ten every day, mainly to get to work. Where there are no reliable, accessible alternatives, it is unlikely that this situation will change any time soon.

Admittedly, in the near future, an array of factors will considerably transform the lives of motorists and the choices available to them: the take-off of new mobility services such as car-pooling, big steps forward in the field of driving assistance and self-driving systems, on motorways for example, new engine types, more restrictive regulations and taxation, and so on.

However, none of this will fundamentally change the model. Apart from in very big cities, the individual car still has a bright future. The breakthrough will come with robo-taxis, level-5 self-driving vehicles capable of taking passengers from A to B on demand, at an affordable price. Predicting a date for this revolution is risky business but it is not expected to happen for another fifteen years or so.

In the meantime, however, stakeholders in the sector will have to prepare for a gradual erosion in sales and address changing consumer expectations by offering services and customer experiences that seamlessly combine physical and digital channels.

4

DIGITAL TECHNOLOGY IS THE KEY AND THOSE ABLE TO MAKE THE MOST OF THE NEW OPPORTUNITIES WILL SET THEMSELVES APART

SANAT JOSHI
Head of WW Automotive and Manufacturing Industries BD, Amazon Web Services

> ***Integrating the digital dimension is a revolution that requires a radical mindset change from manufacturers***

Among all the transformations that are currently happening in the automotive sector, the digitization of the passenger compartment is the most important one because it will radically change the user experience and perception of how we use the car. For example, with Alexa, the intelligent voice assistant we will be able to provide a secure, intuitive, and enjoyable human machine interface to drivers and passengers.

It will enable OEMs to deliver more services in the vehicle, such as music, and navigation services, while minimizing driver distraction, thus creating new business opportunities focused on the passenger needs.

This dialogue between drivers and their vehicles will be enriched by a deeper integration of data-based services, such as location-based services, or recommendation services that provide suggestions based on the drivers' past preferences. Car manufacturers will also develop digital services for the passengers to make their journey more pleasant : shopping, music, leisure... Eventually, the car will be better integrated in a connected environment, which will facilitate the emergence of new uses.

For instance, vehicles will become a delivery point, or will better coordinate with other means of transport. However, even if cars are very different from 5 years ago, the development of digital interfaces available on board is just beginning. Actually, integrating this digital dimension will be a revolution that will require from car manufacturers a radical change in their approach. They are used to anticipating what customers are interested in several years ahead, but, in the digital era, they have to go faster.

Their ability to do this cultural change is a key factor of success that will differentiate the ones that will be able to take advantage of these new opportunities.

5

FACED WITH THIS UPHEAVAL, MANUFACTURERS WILL HAVE TO REINVENT THEMSELVES

DIDIER GAMBART
CEO, Toyota France

> ***Taking a new approach also means fitting into a new societal and technological ecosystem***

The model based on individual vehicle ownership is set to become obsolete, so manufacturers need to reinvent themselves. Toyota has put responsible automobility at the core of its future strategy, focusing on three aspects.

Firstly, the environment with the ambition of slashing our CO2 emissions by 90% by 2050 (compared to 2010), mainly through hybrid and hydrogen technologies; second, safety, and third the notion of mobility for all, with a range of vehicles and services that respond to the diversity of profiles and needs.

There are numerous technological, economic and societal challenges to overcome before we can achieve fluid, integrated mobility, coordinated by platforms such as the Mobility Service Platform. The self-driving vehicle will spark this revolution and, with that in mind, we need to rethink business models, user experience, logistics, maintenance and so on, while complying with regulatory changes.

It is a vast project that requires a complete overhaul of the traditional organisations, something that we have done at Toyota, ready to tackle innovative topics in a more agile way and to become more outward-looking.

Rethinking our approach means making a place for ourselves in the new societal and technological ecosystem, and input from startups will be crucial. Toyota started out making weaving looms almost 100 years ago and has constantly reinvented itself to become the world's leading car manufacturer.

Today, the Group is gearing up for an even more far-reaching transformation.

6

CARMAKERS WILL HAVE TO ACHIEVE A THREEFOLD TRANSFORMATION

NICK GILL
Global Automotive Council Lead, Capgemini

> ***Being able to work effectively with startups and draw on their customer focus will be key to success***

Over the past few years, the automotive sector has been making huge investments in four areas that will undoubtedly define its future: connectivity, autonomy, mobility and electrification.

Car manufacturers are becoming increasingly aware that these areas are all interdependent: electrification facilitates connectivity, which is itself vital for autonomy, which encourages mobility, and so on! A truly virtuous circle, where advances in one area will benefit all the others

In addition, these four areas are all likely to have an impact beyond the traditional sector boundaries. Telecoms, IT, energy and utilities, finance and public services will all inevitably be involved when it comes to defining and implementing the infrastructure associated with tomorrow's vehicles.

While we do not yet know which services will define the connected car, or which use-case will drive the adoption of self-driving vehicles, one thing is sure: consumers, and consumers alone, will be the once who decide. If car manufacturers are to make a success of this period of disruption and become the benchmark player in the field of mobility, they will have to achieve a threefold transformation by breaking down organisational silos, working on a peer-to-peer basis with external partners, and focusing resolutely on their customers.

These are three profound cultural changes. Being able to work effectively with startups, and being able to draw on their agility and their customer focus will no doubt be key to success.

7

WITH REGARD TO STARTUPS, THE BIG INDUSTRIAL GROUPS MUST SHOULDER THE RISKS OF INNOVATION

JACQUES ASCHENBROICH
CEO, Valeo

> ***There are differences between the cultures and the responsibilities of the two worlds***

We estimate that there are around 30,000 startups in the automotive sector worldwide. Inspired by Tesla, some aspire to become fully-fledged manufacturers. Others, such as Waymo or Uber, seek to revolutionize vehicle use, with the introduction of robo-taxis for example.

Most of them, however, are focused on either digital mobility services, such as car sharing, or on technological niches, such as sensors or solid-state batteries. It is vital that carmakers and OEMs collaborate with these newcomers, who hold massive intelligence, energy and innovation potential. Which is why an initiative like France AutoTech is a welcome boost to the ecosystem. Nonetheless, not all startups have the same needs, the same maturity, or the same position in the value chain. Hence, their relationships with the big corporations take many forms.

For example, Valeo has entered into a technological partnership with Mobileye, has invested directly in Navya, and has acquired Peiker and Gestigon. There is a broad array of possibilities. But whatever form the relationship takes, it remains complex because of the differences between the cultures and the responsibilities of the two worlds.

The big corporations have to deliver the results expected by their customers, shareholders and employees. Yet when we incorporate a new entity, we inherit not only its strengths but its weaknesses too.

One of the key roles of OEMs is to assume and control this risk to secure the delivery of innovation to carmakers.

8

THE AUTOMOTIVE ECOSYSTEM NEEDS CATALYSTS TO FACILITATE COLLABORATION

NICOLAS DUFOURCQ
Chief Executive Officer, BpiFrance

> ***Bpifrance helps bringing these different worlds together to form an enlarged and vibrant ecosystem***

In France, the automotive sector has always been driven by the passion of entrepreneurs. Which is why Bpifrance lends its support to numerous startups across the entire automotive industry, from digital services to deep techs and the more traditional businesses. We listen to them, advise them and support them with a series of financial and non-financial aids, such as our SME Accelerator scheme, to help them turn their vision into reality.

In the more specific case of the automotive industry, Bpifrance also acts as a catalyst for new partnerships. Today, manufacturers and the leading equipment suppliers are eager for new technologies and ideas, which may spring from sectors with which they are less familiar, such as the semiconductor industry or the field of artificial vision.

We enjoy a central position with an all-round view of innovation in France, so we help bring these different worlds together to form an enlarged and vibrant ecosystem, in which startups can find the means they need to grow. They are not all destined to become giants, but we cannot let those who demonstrate potential go unnoticed. At the present time, however, our most promising fledgling entrepreneurs head off to the United States or China, countries that welcome them and reap the rewards.

Contrary to popular belief, the obstacles to nurturing these businesses and helping them grow are not financial but cultural. To resist the temptation of selling up, an entrepreneur must have the ambition to create something great and, above all, the audacity to believe in it.

9

AUTOTECH STARTUPS MUST SPEAK WITH A COMMON VOICE

ALAIN CLOT
Chairman and Founder, France FinTech

> ***Like France AutoTech, France Fintech is a catalyst for bringing members together and sparking innovation***

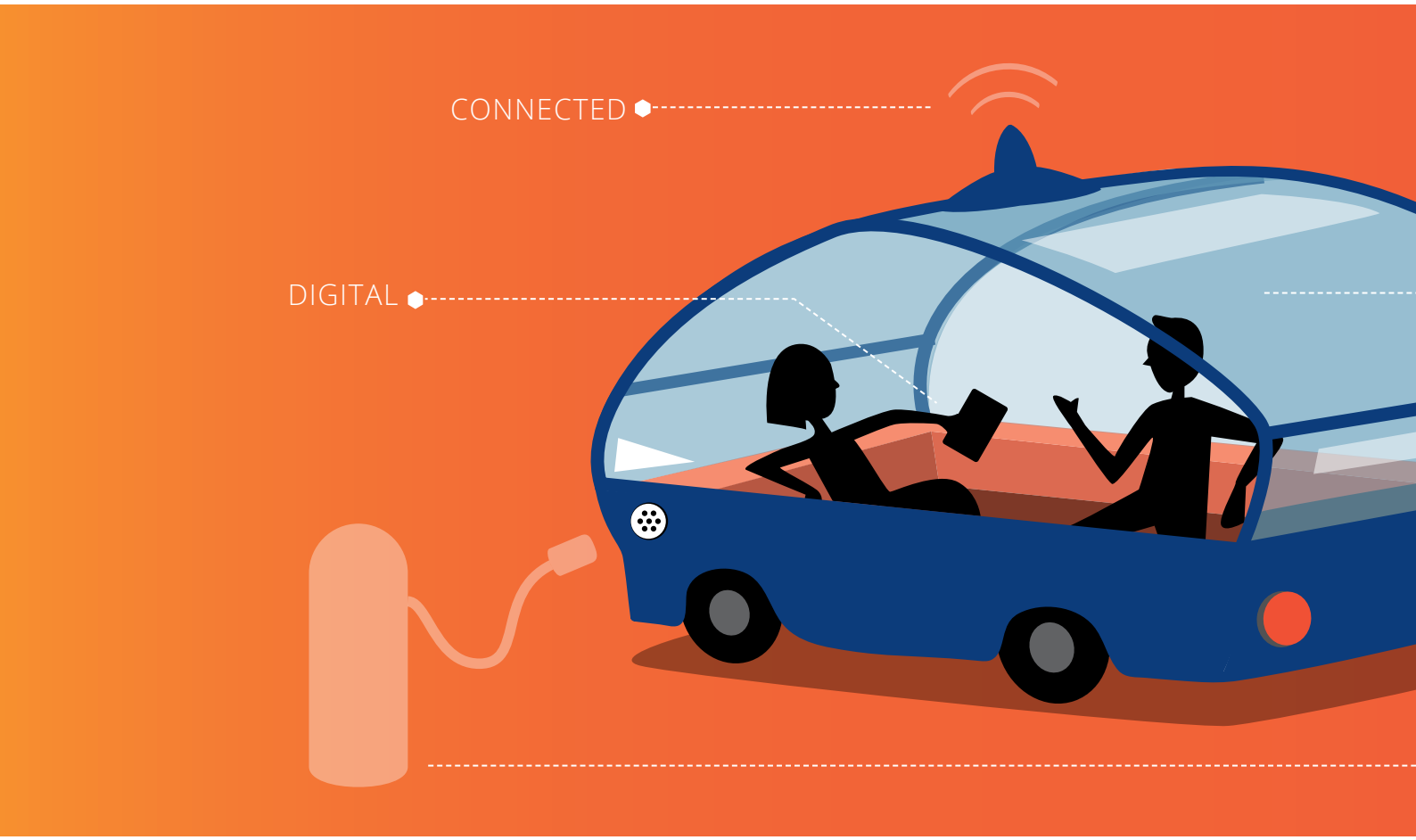
With the advent of digital technology, I believe that the automotive industry is having to face very similar challenges to those encountered in the realm of finance. The first being the huge change in consumers' expectations and behaviour. Increasingly, consumers want freedom and a feeling of control over their choices, to be able to change their mind, and put together their own solutions as their needs evolve. Use is taking precedence over ownership, convenience over price. The relationship with the object is changing radically with, for example, the take-off of carpooling or the various rental schemes.

In both banking and the automotive sectors, the outcome is a rapid and profound upheaval of the ecosystems that had not seen much change over the years: startups are offering new services and new experiences much more in line with what people want, powerful operators from other sectors – such as GAFA – are edging into the market; the regulations, which are already very stringent, are changing and becoming tougher, and then there are groundbreaking innovations such as blockchain and artificial intelligence. What is more, both sectors have lost some of their original appeal and need to rebuild their image to win over clients and attract the best talents.

France FinTech was created to rise to all these challenges together. Like France AutoTech, France Fintech is a catalyst for bringing members together and sparking innovation, giving them a common voice and presence before the various stakeholders in the huge changes taking place.

Bonne route, France AutoTech!

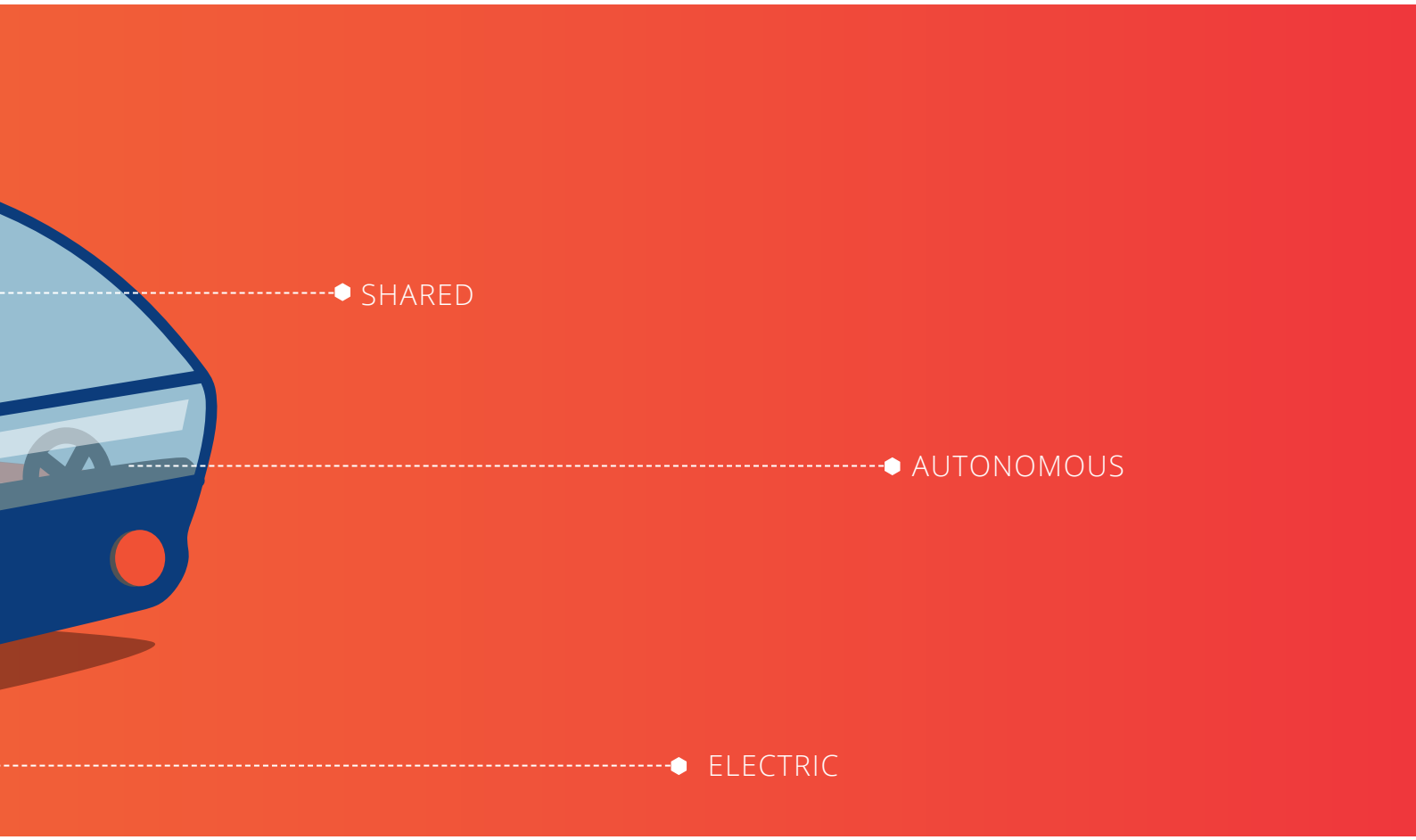

4 TRENDS
SHAPING THE
MOBILITY OF THE FUTURE



MOBILITY WILL BE
CONNECTED - AUTONOMOUS - SHARED
ELECTRIC - DIGITAL

The automotive industry is undergoing an unprecedented revolution, driven by five factors: sharing, autonomy, connectivity, electric engines and digital. As use is redefined, industry stakeholders are increasingly turning into mobility service providers. This new concept of 'mobility as a service' (MaaS) is a major paradigm shift and comes with a new mindset, widely shared by the players in a growing ecosystem.

From every angle, this multifaceted or multimodal 'disruption' of society is opening up some extraordinary opportunities, while raising numerous questions.



SHARED MOBILITY

While 60% of Europeans own a car, their vehicles are only used for 3% of their life cycle. This model is far from optimal and the various sharing services intend to give it an overhaul. However, despite the appeal of these services, questions remain: How do we ensure their economic viability? How do we roll them out outside of the major urban centres? And how do we industrialise offers where the value is largely social? The availability and reliability of services for all, and a stricter regulatory framework to prevent abuse, will be key to success.

ELECTRIC MOBILITY

Regulatory changes, a fall in battery production costs, increased battery life and the development of charging infrastructures will speed up the introduction of electric vehicles. With them, other than a more positive carbon footprint, we will see the emergence of new business models (for example, using your vehicle to store then redistribute its energy). However, we need to make sure that the arrival of other forms of energy, such as hydrogen, does not alter the positive opinion consumers currently have of electric vehicles.

CONNECTED MOBILITY

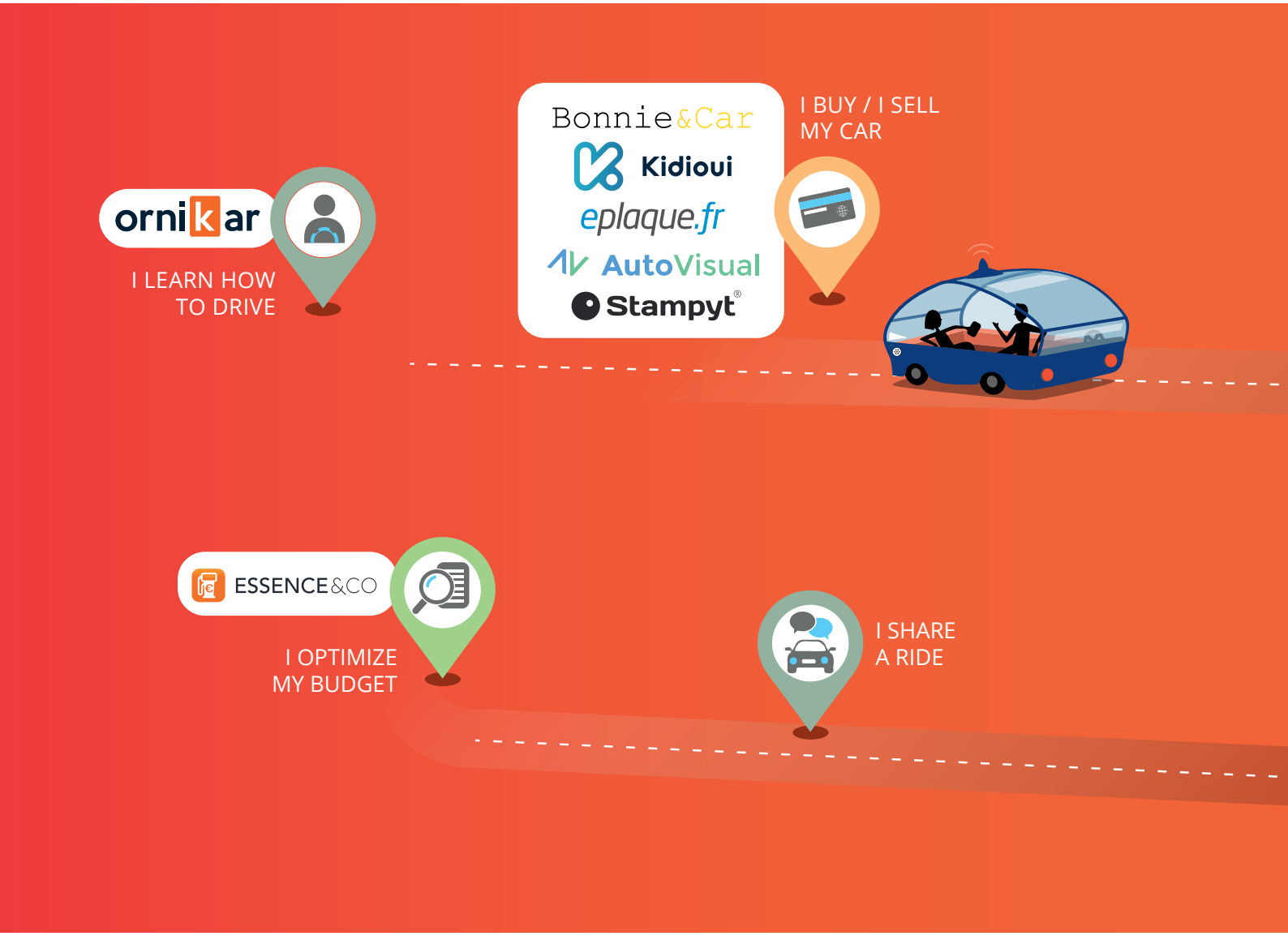
Just as smartphones have developed multiple uses for the telephone, the connected vehicle will redefine interactions between the car and motorist. However, as on-board services develop, the vehicle's value proposition and, in particular, its residual value will be called into question. What attitude will the manufacturers take? How much of the value associated with these services will they capture? And how will the used car market be affected?

AUTONOMOUS MOBILITY

Robo-taxis and ambulance robots will revolutionise habits and address unresolved mobility situations, such as emergency services in rural areas. However, the shift towards self-driving vehicles raises a number of questions. Given that level-4 self-driving vehicles will account for 55% of sales in 2040, how can we handle the transitional period during which self-driving and non-autonomous vehicles will exist side-by-side? And how will we manage the end-of-life of the conventional fleet, which currently counts almost 40 million vehicles in France?

DIGITAL MOBILITY

The customer experience in the automobility sector is changing: booking a vehicle with driver, paying for parking with your phone, offering an online maintenance service, registering your car with your tablet... Digitalization has transformed the habits of automobility consumers. And what is at stake is simplifying responsible driver's experience to offer them a service adapted to their needs. How far will we get down the road of automation? What role will have in car screens? How can we ensure continuity within the digital experience once outside our car?



MOTORISTS
WILL BE RESPONSIBLE CITIZENS

Consumers are increasingly attentive to the societal and environmental impact of the choices they make, even when it comes to their car. Where and how was my vehicle produced? How does it perform? How will it be used, reused and dismantled? These are just some of the questions that motorists are now asking and the answers provide the basis on which they assess manufacturers and service providers.

Tomorrow, travelling by car will be a responsible endeavour, so automotive businesses will have to take three major issues into consideration:

RESPECT FOR THE ENVIRONMENT

Innovation must aim for rational consumption to reduce greenhouse gas emissions, harmful emissions and waste. While the car is a voracious consumer of energy today, in the future it could help to produce energy and optimise energy consumption. The car is in constant interaction with its environment (cities, roads, buildings and so on), and offers possibilities for energy storage and transport that will optimise use and cost. For example, a vehicle can run during the day but be recharged at night, when electricity is cheaper.

ROAD SAFETY

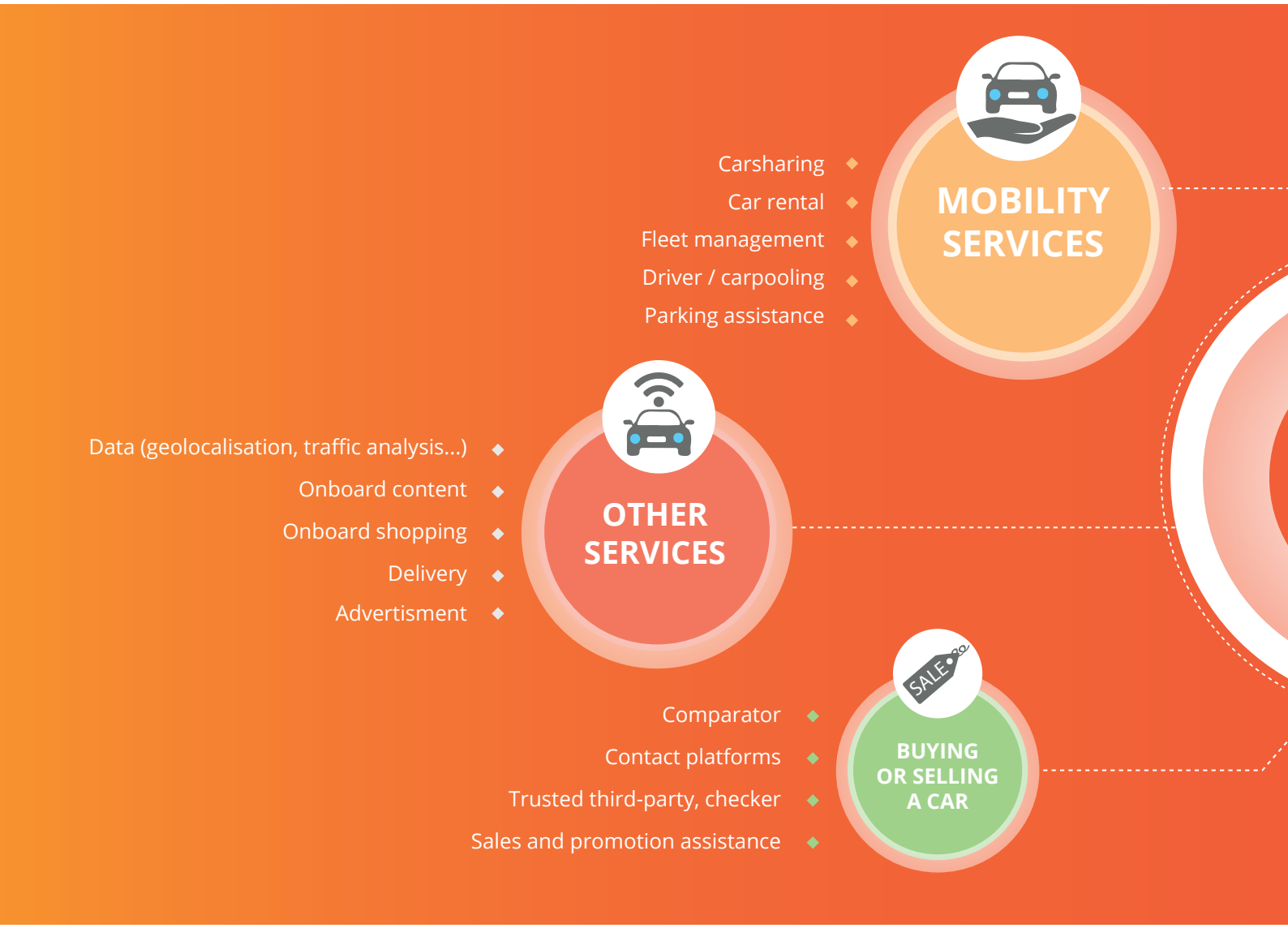
A self-driving vehicle processes 5 TB of data every day! Big Data and Data Science will be used to exploit that data to give us a better understanding of various driving situations. The challenge will then be to develop tools and services to facilitate interaction between the self-driving vehicle and its environment in order to reduce accidents, starting with the upcoming transition phase when self-driving vehicles will exist alongside conventional vehicles and pedestrians.

The self-driving vehicle will not only have to avoid hazardous situations, but also make sure its presence in the environment is recognised and that people become accustomed to its presence.

PERSONAL DATA PROTECTION

Consumers increasingly seek to protect their data, yet self-driving vehicles will require significant data exchanges to ensure the safety of passengers and their environment. A vehicle whose passengers prefer not to share their data would become 'invisible' to surrounding vehicles, and therefore dangerous. To keep everyone safe, it will be the motorist's responsibility to share their data, and the relevant companies' responsibility to allow them to do so in complete confidence.

Well aware of this societal shift, France AutoTech has clearly stated its intention to bring its members together around a common goal: making life better and improving the experience for responsible drivers.



NEW SERVICES WILL BE **DEVELOPED BY STARTUPS**

In France, a startup is created almost every minute, but nearly half of them fail in the first three years**. On the one hand, we have the big groups built to take disruption in their stride and, on the other, newcomers constantly seeking innovation but often overwhelmed by the ensuing challenges. These two extremes have to exist and operate side-by-side, in a forced relationship. Here, three CEOs, Léa Chevry (Tchek), Sophie Vergne (Kleen) and Célina Maubert (Easyverif), share their vision and tell us how it all works.*

« There won't be much change to the relationship between big businesses and startups over the next ten years. The startups are gathering pace, are more innovative but have less focus, while big firms are more profitable, better organised, with more resources but are less likely to solve problems quickly », observes Léa Chevry.

* Insee, 2017. ** French Web, 2018.

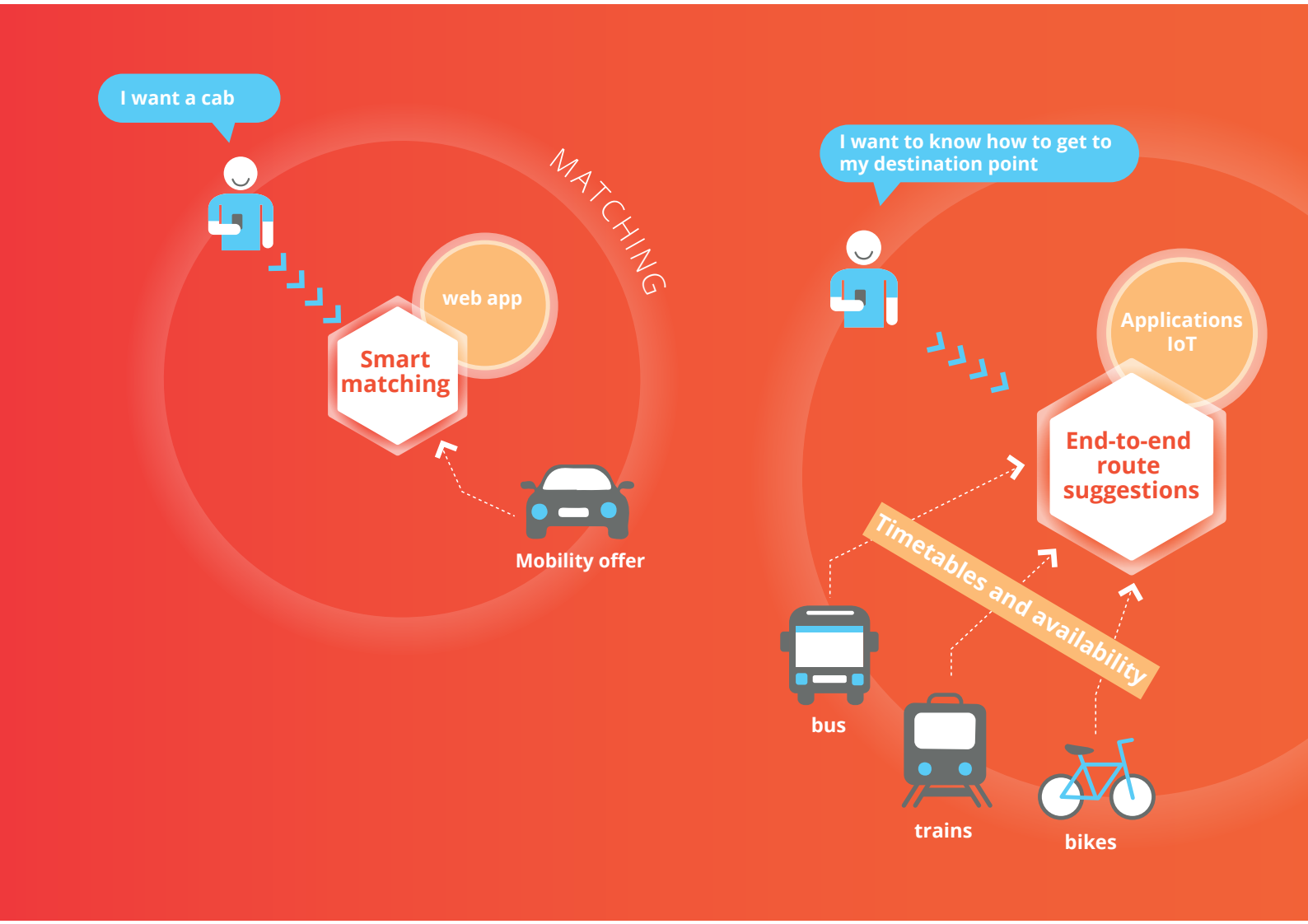
While big businesses are more likely to work with a startup to produce a POC or run a pilot project , the fledgling business will not often be involved once the project is scaled up. There are two main reasons for this:

- first, startups are not always familiar with how the big corporations operate, the constraints they face and the efforts required for integration; when faced with a problem, these big businesses have to mobilise all of their networks, their information systems, and so on.
- secondly, a win-win relationship requires startups to look to the long term yet their survival really depends on the short term and the corporations' ability to iterate rapidly.

For our three entrepreneurs, however, startups are not destined to replace the big companies. The goal is to learn and gain from each other in a partnership set-up. « The role of big corporations is to invest in startups but not necessarily on a majority basis », Célina Maubert thinks.

UNPARALLELED AGILITY

One advantage of startups is their ability to change direction rapidly. « If, a year down the line, a startup realises that their business model is not right, they can change it in a single afternoon », says Léa Chevry. It is this unique agility that makes the relationship between big corporations and startups so profitable and yet so complex. « For the startup, one of the keys to collaboration is to stay focused on its product or service, and to avoid cross-cutting projects or those that are not carefully targeted », she goes on. In Sophie Vergne's view, the big groups « should make better use of the startups' agility and their ability to pick up weak signals to test new ideas ». Which also means adjusting their project management.
In France, startups have a real opportunity to create the automotive services of the future. However, if they want to avoid being confined to the role of 'test centre', as is all too often the case, they have to look to the long term with new business models that draw on their respective strengths and build on their combined qualities.

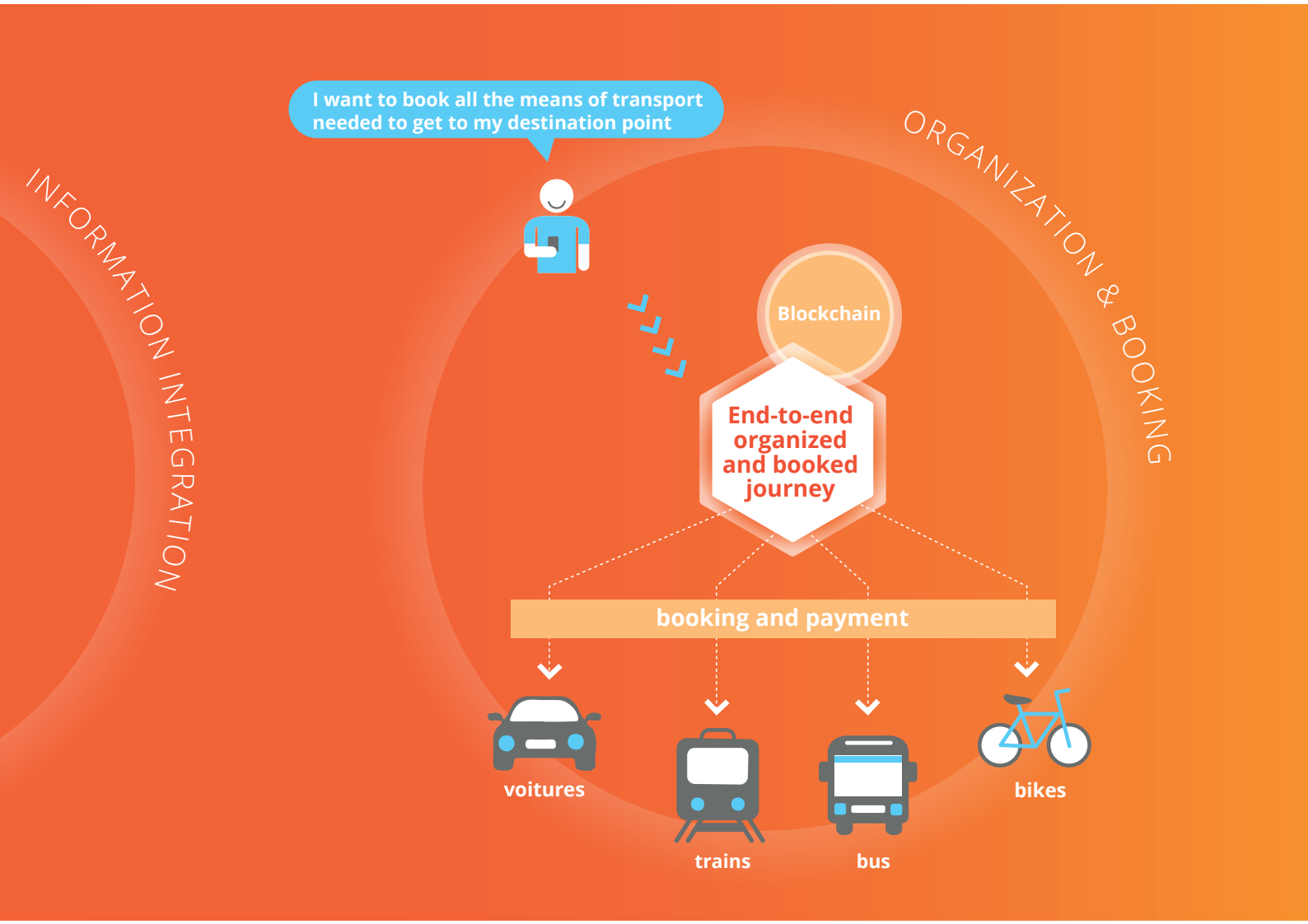


DIGITAL PLATFORMS
WILL GENERATE NEW USES

Future mobility will be multimodal, flexible and tailored to the user's requirements. It will be based on platforms that compile the services on offers from various companies to provide users with a quality service from start-to-end of their journey. Around these transactional platforms, startups will develop specialist services and support technologies to keep up with changing uses and needs.

In an increasingly connected world (1.4 billion smartphones sold in 2017), MaaS (Mobility as a Service) platforms will be the go-to solution for meeting people's mobility requirements, especially in densely-populated areas. The capacity to rapidly integrate new services means they will be able to adapt to users' expectations almost instantly.*

* GfK 2017



To successfully complete this process of platformisation, three core features are required:

AN INCLUSIVE ECOSYSTEM

To offer reliable end-to-end services, MaaS platforms will need to bring together stakeholders from all along the value chain: carmakers, the associated service providers, digital companies, and so on... What kind of partnerships will they build to offer seamless, 360° services? What business model will such a platform apply? How can we make sure that the wealth created will be fairly distributed? And what strategy will car manufacturers adopt?

CONTROLLED DATA SHARING

The development of new high-value-added services will require user data of sufficient quality and quantity. This data sharing thus needs to be structured and there has to be guarantees on the reliability of flows between the various stakeholders, even when they are competitors. Also essential are data governance, digital identity and access rights management, and continued compliance as regulations evolve.

TECHNICAL INTEROPERABILITY

To provide seamless services, businesses in the ecosystem will have to sign agreements with one other, and manage a wealth of bilateral transactions despite their differences in size, sector and information systems. The blockchain will facilitate interoperability and allow platforms to integrate new services swiftly, and will thus play a key role.

France AutoTech actively anticipates these challenges and is contributing to the development of an open ecosystem, on Capgemini's initiative, involving stakeholders in conventional mobility, banking and insurance, and fleet management. Startups will find a supportive environment in which they can invent the technologies and services for the future of automobility.

JOIN FRANCE AUTOTECH

PRESENTATION

Consumers are uncompromising on safety, concerned about the environment and vigilant about use of their data. They expect the automotive industry to take these new topics into consideration. France AutoTech brings together startups who share the same ‘responsible motoring’ values, and develop technologies and services that meet these consumers’ needs.

In keeping with the rich history of innovation in the French automotive industry, France AutoTech aims at bringing the 300 French automotive startups together around a shared ambition to innovate for the greatest number, and a mutual concern for the environment, road safety and transparent personal data use.

This initiative is the only one of its kind in the world. It structures the startup ecosystem in the automotive sector, helping to raise the profile of these newcomers while facilitating their interaction with the incumbents.

Partners, sponsors and members are the three founding pilars of France AutoTech. The association federates not only startups but also big companies and institutions of the sector. France AutoTech partners build together the improvement of tomorrow's automobility, in an open ecosystem logic, while giving it an important role in the global competition

300 STARTUPS
dedicated to the French automotive sector

BUSINESS OPPORTUNITIES
with large corporations and disruptive startup models

A SYMPATHETIC EAR
from financers

A ONCE-A-YEAR OPPORTUNITY
to take part in a challenge to set your business apart

A UNIQUE NETWORK OF ENTREPRENEURS
labs, schools and expertise

BETTER UNDERSTANDING
of the startup ecosystem

APRIL 2017
Creation of the association

FRANCE AUTOTECH SEEKS TO:

FEDERATE AND PROMOTE ITS MEMBERS
by raising public and professional awareness of the issues that surround the automotive revolution. This action will be highlighted:

- in a special pavilion at the 2018 Paris Motor Show;
- at the 2019 AutoTech Disruption event being organised by the association to bring together the French and international AutoTech ecosystem and opinion leaders ;
- with the production of value-added communication materials, such as this forward-looking analysis.

DEFEND THEIR INTERESTS
through joint initiatives focused on their concerns, so as to establish a common standpoint. The association can help them through various procedures, providing them with legal support if necessary.

DEVELOP SYNERGIES
both between them and with external partners by organising regular meetings and building bridges with major players (examples include the contribution to the Trusted Car community launched by Capgemini, partnership with Saint-Gobain for innovation in the windscreen sector, running hackathons, and so on.).

As the car is moving to more intelligence, more connectivity and more autonomy, the whole mobility system and the car services are changing too. Trusting these new services and the ones that realize them is the key condition to a happy and efficient mobility.
France AutoTech and France Pare-Brise are at the heart of this revolution, which is inventing itself everyday.

MARTIAL LAFONT
GENERAL DIRECTOR, FRANCE PARE-BRISE,
GENERAL MANAGER, GLASSDRIVE

We may not notice that, but 80% of the 100 to 800 km journeys are made by car, and most of the time the drivers are all alone in their cars! It's then logic and urgent to change these behaviours and switch to shared mobility, especially in a context of climate change and when the population and its aspirations for mobility are growing.

FRÉDÉRIC MAZZELLA
PRESIDENT AND FOUNDER OF BLABLACAR AND WONDERLEON

A FORWARD-LOOKING ANALYSIS CO-PRODUCED BY **FRANCE AUTOTECH** AND

CAPGEMINI

CAPGEMINI JOINS FORCES WITH STARTUPS

This forward-looking analysis, co-produced by France AutoTech and Capgemini, questions the main challenges facing the automotive sector, the new paradigms and the ways its stakeholders can work together. It highlights the forceful contribution from French startups inventing new forms of mobility. The testimonies of institutional and industrial decision-makers and startuppers forge a clear vision of the challenges of the ongoing technological, societal, environmental and organisational revolution.

A revolution that Capgemini is actively supporting by forming an innovation ecosystem of startups, innovative SMEs and freelance entrepreneurs. Coordination is vital for successfully integrating applied innovation into new value chains. It will trigger a transition to industrial scale, the speed of which has to match the pace of the market. For 18 years now, Capgemini has been exploring new purchasing behaviour trends in the automotive sector with its annual global Cars Online study.

Capgemini is at the forefront of innovation to address the entire breadth of clients' opportunities in the evolving world of cloud, digital and platforms. Building on its strong 50-year heritage and deep industry-specific expertise, Capgemini enables organizations to realize their business ambitions through an array of services from strategy to operations. Capgemini is driven by the conviction that the business value of technology comes from and through people. It is a multicultural company of 200,000 team members in over 40 countries. The Group reported 2017 global revenues of EUR 12.8 billion.
People matter, results count.

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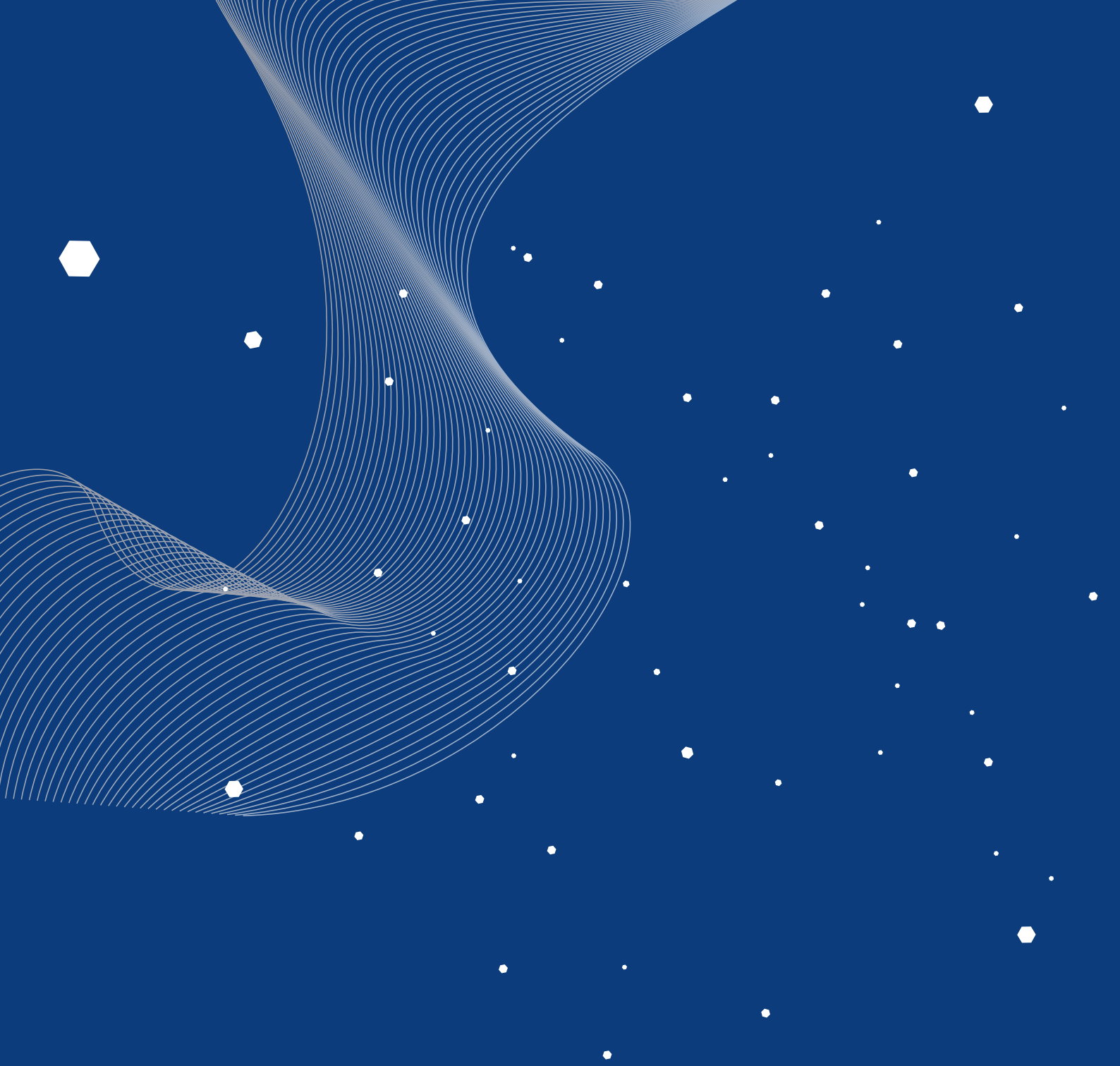

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FRANCE AUTOTECH

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