



Investing in Sustainable Mobility startups



Fabienne Herlaut
Managing Partner

Agenda

1. Our approach: Ecomobilité Ventures

2. **Ecomobility:** Definition and market

3. **Our believes :** where we are going

4. **Our observations:** what has happened in 2012/2013

Ecomobilité Ventures: an innovative approach

- Shared vision
- Complementary expertise
- Thriving for partnerships
- Access to open innovation



Our key features

- 25 M€ equity
- Independent and professional management team, 3 professionals
- “Early Stage” and capital development, in Europe
- Active minority shareholder

Our deal flow

- More than 400 projects received
- More than 150 entrepreneurs met
- 130 M€ financing requirements
- 2,5 M€ on average per project

Our achievements: 3 investments in 2012



BtoB carsharing operator
(Norway)



Electric wheel for industrial
handling devices
(France)



Peer-to-Peer carsharing
webservice
(France)

Total investment: +/- 5M€

Agenda

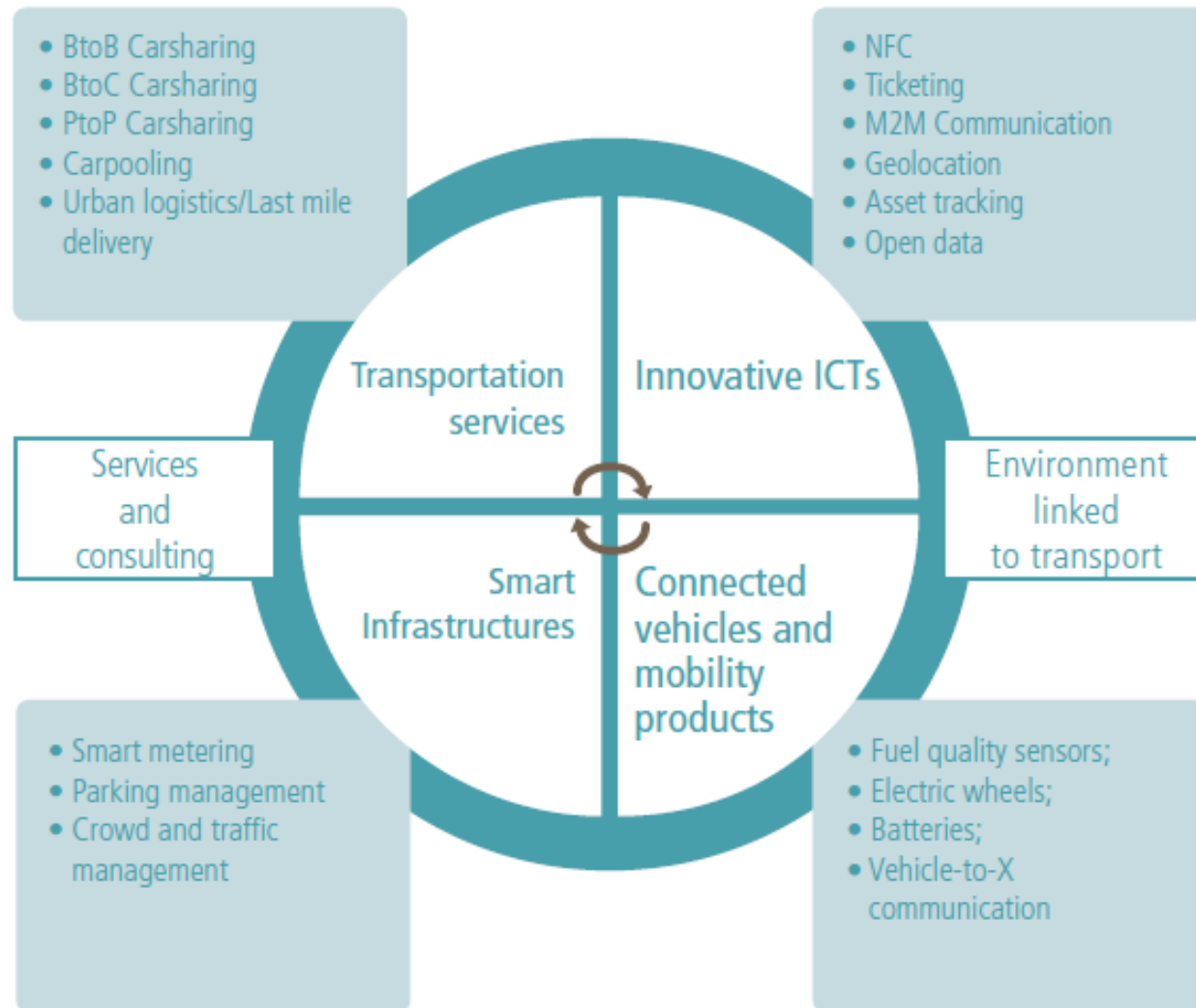
1. **Our approach:** Ecomobilité Ventures
2. **Ecomobility:** Definition and market
3. **Our believes :** where we are going
4. **Our observations:** what has happened in 2012/2013

Definition

ECOMOBILITY is:

An ecosystem of products, services and technologies to create and propose mobility solutions economically efficient and environmentally-friendly.

Illustrations



Agenda

1. **Our approach:** Ecomobilité Ventures
2. **Ecomobility:** Definition and market
3. **Our believes :** where we are going
4. **Our observations:** what has happened in 2012/2013

New consumption behaviors

- **Owning a car is no longer viewed as a social status symbol**
- **Collaborative consumption is booming in mobility applications**
- **Social networks combine mobility and fun**

New technologies facilitate mobility

- **Navigation and geolocation**
- **Machine-to-Machine and Machine-to-Grid communication**
- **Electronic ticketing and payment**
- **Identification**
- **Real time information**

New players are entering the market

- **The historical split between public transportation and private cars is disappearing**
- **Industrial leaders are entering the market :**
 - Multinational companies from various sectors such as energy, SSII, construction ...
 - Family owned businesses
- **Startups offer breakthrough products and innovative business models**

Our beliefs

- **Financing requirements are significant and will increase as market matures**
- **Access to financing is not enough, there is a need for scalable testing fields**
- **Profitability comes from critical mass and consolidation**
- **Shared usage of cars converges to a unique market place including carsharing, ridesharing, taxis....**
- **Private cars are becoming "Private-Public", fully integrated to public transportation networks**
- **The most valuable mobility is the one that can be avoided !**

Agenda

1. **Our approach:** Ecomobilité Ventures
2. **Ecomobility:** Definition and market
3. **Our believes :** where we are going
4. **Our observations:** what has happened in 2012/2013

Smart mobility an important investment topic in the US

Some examples show the attractiveness of smart mobility...



- Development of a self-driven car;
- 10M€ invested in Sidecar – an innovative taxi service



TESLA MOTORS

- +/- \$1 billion raised
- Prestigious investors like Larry Page or Sergei Brin



- \$47.5 Million secured with Kleiner Perkins, Toyota, Siemens and Braemar energy ventures.



- \$11.5 Million raised with Austin Ventures and CrunchFund

... and are representative of the sector's dynamism in the US.

... in Europe too...

DAIMLER

- Carpooling, carsharing (Germany) – **10M€**
- Tiramizoo, Urban logistics – company acquisition
- Intelligent Apps, mobile apps for taxis – **10M€**

ACCEL[®]
PARTNERS

- **17M\$** in Hailo – Mobile app for taxis
- **7.5M€** in Comuto – Carsharing

EARLYBIRD

- **1.8M€** in Ubitricity – charging devices



- **600 k€** in Parkatmyhouse – P2P Parking

ÉCOMOBILITE[®]
VENTURES

- Move About, B2B Carsharing – **2M€**
- EZ Wheel, autonomous electric wheel – **1.7M€**
- Zilok Auto, P2P Carsharing – **1.25M€**

BUT deceiving EV performances...

▪EV sales below expectations in 2012:

- 9 300 EVs sold in France;
- 4 007 EVs sold in Norway;
- 3 254 EVs sold in Germany.

EVs only account for less than 0,3% of total sales in Europe

▪Charging infrastructures have not yet been installed:

- 6 000 charging spots in France;
- 5 000 charging spots in Germany.

▪BUT:

- Renault aims at selling 100 k Zoés;
- Germany as set a goal at 1M EVs in 2020...

... have lead the EV “bubble” to burst in the US.

better place 

- Filed for bankruptcy in May 2013;
- +/- 850 M€ invested in the project since 2007;
- Tier one charging device supplier for Renault!



- +/- 1.2B\$ invested since company creation;
- Currently managed by a turnaround specialist



- +/- 360B\$ invested since company creation;
- Filed for bankruptcy in 2012

At the same time, collaborative consumption is spreading through mobility applications...

- Collaborative consumption is booming in mobility applications



Company consolidation is starting...



postoinauto.it
carpooling facile, sicuro e divertente!

Conclusion

