



INNOVATIONHUB

5 Years of innovation and transformation for Groupe ADP

PRESS KIT

JUNE 2023



Innovation Hub: an open innovation approach **to transform our airports and our businesses**

In 2017, Groupe ADP's open innovation approach was launched to spread the culture of innovation within the company and connect to the Paris innovation ecosystem (OPEN), to roll out experiments with startups (CONNECT), and to take equity stakes in startups or investment funds (INVEST). In 2022, a new forward-looking pillar (RE.INVENT) has been added in order to explore new businesses and areas of activity that can only be explored through a stronger ecosystemic approach (regulators, manufacturers, public authorities, etc.).

INNOVATION HUB

SINCE 2017

35

EVENTS
A YEAR

15,000 PARTICIPANTS
a year on average

OPEN

15

TRADE SHOWS
A YEAR

3

LOCATIONS
AND A TECHNOLOGY
SHOWROOM

at Paris-Charles de Gaulle,
Istanbul and Hyderabad

35,000 VISITORS
in Paris

9

DIRECT HOLDINGS
IN START-UPS

12 ACQUIRED
in 5 years

14

DEDICATED STAFF
IN PARIS

50 INTERNATIONAL
referrers

6

PARTNER
INVESTMENT FUNDS

INVEST

OVER
€20 M

INVESTED
through minority stakes

CONNECT

75

EXPERIMENTS
CARRIED OUT
with start-ups

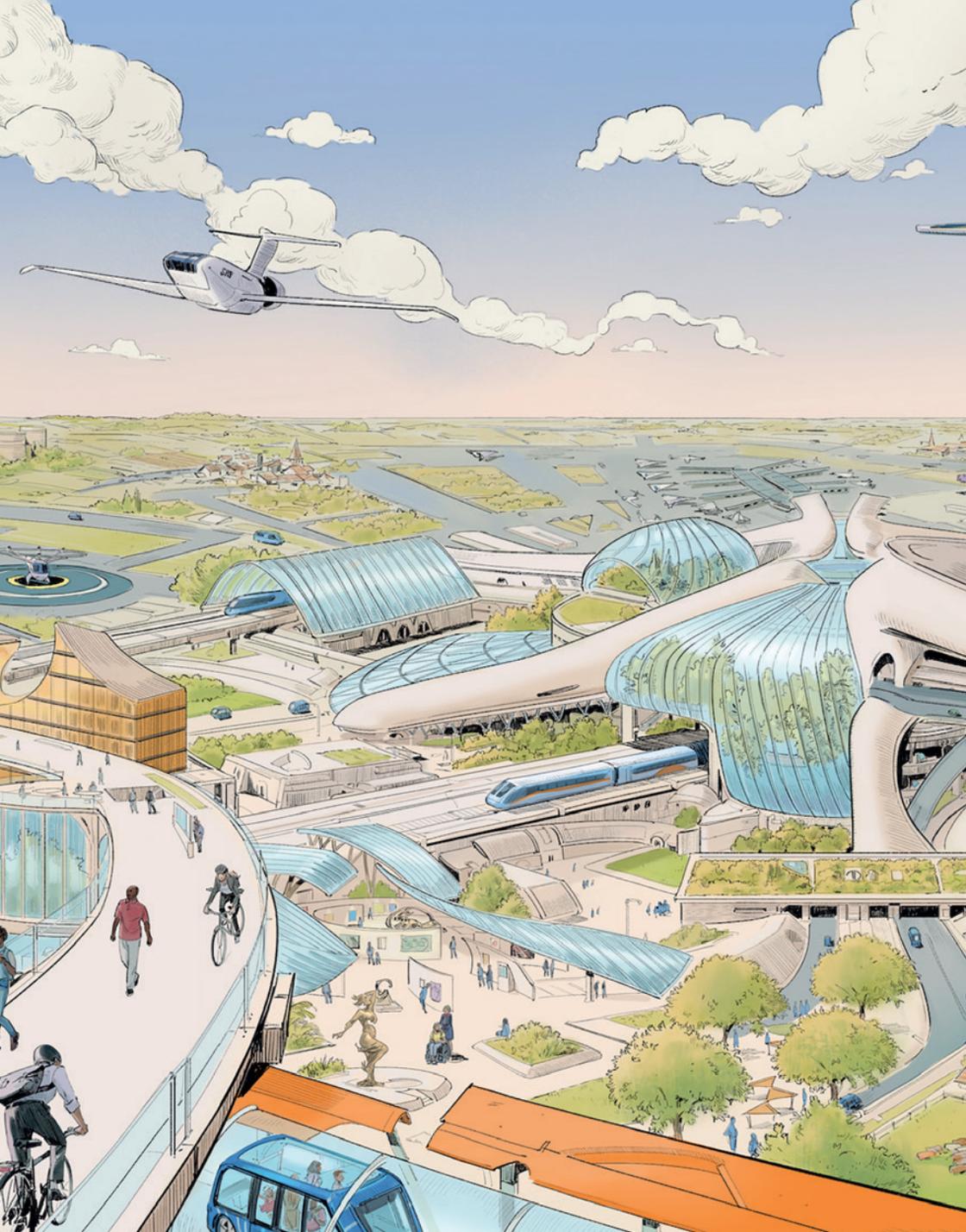
9 OPEN INNOVATION
challenges

OVER
€100 M
INVESTED
in partner funds

RE INVENT

#1

IN EUROPE
1st VERTIPORT TEST
on an airfield



Innovation Hub: five years, age of maturity

OPEN

Spreading the culture of innovation and being at the heart of the local innovation ecosystem

— A WIDE RANGE OF EVENTS AND CONFERENCES TO SPREAD THE CULTURE OF INNOVATION

- ◇ **CONFERENCES:** to familiarize all employees with innovations and new business practices, in a hybrid format (50 participants on average on site and 50 remotely).
- ◇ **INNOVATION CAFÉ:** giving an employee the opportunity to share an innovation in a restricted circle.
- ◇ **INNOVATION DAY:** a day dedicated to exploring an innovation and transformation issue in greater depth.
- ◇ **REVERSE PITCH:** pitch to one of our partners on one of the Group's strategic transformation issues to encourage innovation proposals.

**CONFERENCE
ON BLOCKCHAIN**
(SEPT. 2019)



**INNOVATION CAFÉ
ON DRONES**
(MAY 2022)



**INNOVATION DAY
ON FUTURE
OF WORK**
(JUNE 2023)



OPEN

— GROUPE ADP IS AT THE HEART OF THE PARIS REGION INNOVATION ECOSYSTEM

The Innovation Department has formed partnerships with:

- ◇ **INCUBATORS AND LOCAL INNOVATION ECOSYSTEMS:**
Paris&Co (incubator of the city of Paris), *Choose Paris Region* (agency for attractiveness and innovation of the Ile-de-France region), Paris-Saclay agglomeration community...
- ◇ **THEME-BASED ACCELERATORS:** *Mobility Club* and *Via ID* on mobility, Impulse Partners on sustainable construction, etc.
- ◇ **THINKTANKS AND OPEN INNOVATION CHALLENGES:** *Futura Mobility* on mobility, Hub Institute on the *Future of Work*, European Startup Prize for mobility.
- ◇ **VENTURE CAPITAL FUNDS AND CORPORATE VENTURE CAPITAL STRUCTURES.**

Thanks to this rich ecosystem, the Innovation Hub teams have led 9 open innovation challenges over the last five years.

ZOOM ON
**REVERSE PITCH
WITH PARIS&CO'S
URBAN LAB**

◀◀ When the company has to convince and inspire start-ups ▶▶

In October 2022, Groupe ADP' teams took part in the first large-scale Reverse Pitch exercise: the company pitched in front of start-ups from the Urban Lab, a platform dedicated to urban innovation run by Paris&Co (the innovation agency for the city of Paris and the metropolitan area) and its incubator dedicated to tourism. The strategic issues of sustainable construction and intermodality, at the heart of the transformation of the group's airports, were shared with the start-ups. Nearly 30 solutions were sourced.



INNOVATION HUB
Salles de réunion
Le PING PONG
Le FABLOR
Le FABLAI
Le PITCH



CONNECT

Testing and deploying new innovative solutions in our airports

– EXPERIMENTING WITH START-UPS:
ACCELERATING THE INTEGRATION OF
NEW PRODUCTS, NEW SERVICES
AND NEW BUSINESS APPROACHES

- ◇ We offer **A UNIQUE PLAYGROUND FOR EXPERIMENTATION** through the diversity of the components and businesses represented at the airport.
- ◇ We support entrepreneurs in the development and **CO-DEVELOPMENT** of their solutions.

CONNECT

— INNOVATE IN THREE AREAS, IN ORDER TO PROVIDE NEW SOLUTIONS TO MEET THE CHALLENGES OF THE GROUPE ADP'S ENVIRONMENTAL AND OPERATIONAL TRANSFORMATION

EFFICIENCY AND SUSTAINABILITY

1—PASSENGER EXPERIENCE

- ◇ Autonomous and electric mobility
- ◇ Biometrics
- ◇ Baggage services
- ◇ PHMR Services

2—OPERATIONS AND INFRASTRUCTURE

- ◇ Flow monitoring and prediction
- ◇ Automation and decarbonisation of operations
- ◇ Energy
- ◇ AI and Machine Learning for industrial equipments
- ◇ Sustainable construction and innovative materials

ATTRACTIVENESS AND RESPONSIBILITY

3—EMPLOYEE EXPERIENCE

- ◇ Listening
- ◇ Collaborative working methods
- ◇ Work pace
- ◇ Personalised support for personal situations

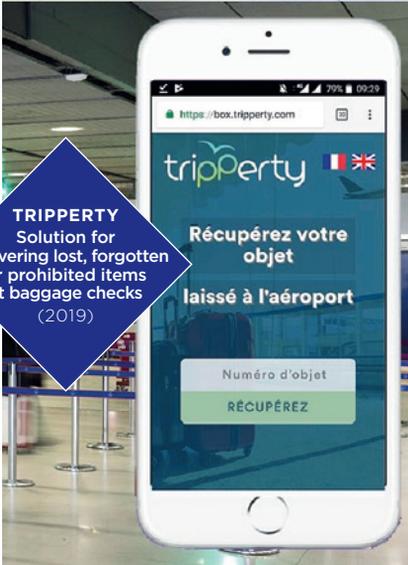
**STANLEY
ROBOTICS**
Robot valet parking
service
(2017)



OUTSIGHT
Lidar technology
for monitoring passenger
and baggage flows
(2020)



TRIPPERTY
Solution for
recovering lost, forgotten
or prohibited items
at baggage checks
(2019)



ALTEIA
Mapping biodiversity
using drones and
artificial intelligence
(2022)



INVEST

A hybrid investment model for start-ups and funds



OVER
€ 20 M
INVESTED
IN 5 YEARS

— OUR START-UP INVESTMENT PORTFOLIO: A DYNAMIC MANAGEMENT WHILE KEEPING AN EYE OUT FOR NEW OPPORTUNITIES

- ◇ Groupe ADP has chosen to keep a **SMALL SIZE OF PORTFOLIO**, picking an average of two direct holdings in start-ups per year. This choice is motivated by the need to support the industrial **DEVELOPMENT OF PROJECTS** in our airports, which is a precondition for acquiring a stake.
- ◇ Like a venture capital fund, Groupe ADP **MANAGES ITS PORTFOLIO DYNAMICALLY**, which has led it to resell certain holdings at the end of an initial 5-year investment cycle, when opportunities for consolidation or mergers arose.



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1000
11-12

INVEST

DIRECT INVESTMENTS IN LINE WITH THE STRATEGY "PIONEERS 2025"

PASSENGER EXPERIENCE

MOBILITIES

GROUND

ADVANCED AIR MOBILITY


onepark
 SAggregation and distribution of parking lots solution (2018)


FLYING WHALES
 Airships for the transport of heavy loads and logistical uses (2019)

SERVICES

OPERATIONS & INFRASTRUCTURES

OPERATIONS


egidium
 TECHNOLOGIES
 Security solution for sensitive areas (2017)


INNOV ATM
 Air traffic management solutions (2018)

INFRASTRUCTURES

ENGINEERING, CONSTRUCTION

MAINTENANCE

COLLABORATEURS EXPERIENCE

FUTURE OF WORK

Welcome to the Jungle
 Hybrid platform for recruitment and employer branding (2023)



Skyports

Advanced Air Mobility
infrastructures provider
& end-to-end drone delivery operator
(2019 & 2022)



Autonomous vehicle fleet
management solution
(2017)



Conversational AI
solution for passenger
(2019)



Lidar-based solution
exploiting the spatial data
(2022)



Real-time passenger flow
management solution
(2015)



Aircraft movements
optimization solutions
(2017)

CONFIDENTIAL PARTICIPATION
Construction project monitoring
and management solution
(2019 & 2022)



Nuisance identification and
real-time monitoring solution
(2020)

INVEST

— PARTNER INVESTMENT FUNDS: COVERING DIFFERENT GEOGRAPHIES AND THEMES, INCREASING FOCUS ON ENVIRONMENTAL TRANSFORMATION

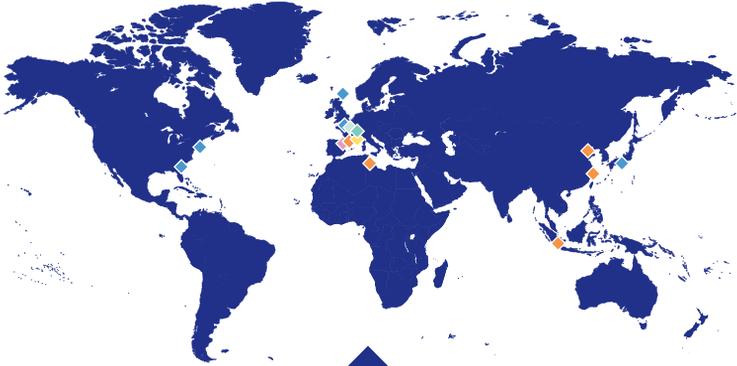
Indirect investments made by Groupe ADP are dedicated to complement each other in terms of theme and geography. Partners' intelligence feeds into the group's various business lines.



ZOOM ON
GROUPE ADP x
SAFETY LINE
ADVENTURE

Founded in 2010, Safety Line specializes in big data, and develops innovative software solutions and predictive algorithms that make it possible, for example, to optimize aircraft trajectories in flight and on the ground. Groupe ADP set up its partnership with this startup in 2017 to codevelop tools for optimizing aircraft movements during the take-off and landing phases through the *AirsideWatch* solution. Groupe ADP acquired a stake in 2017 and sold its shares in 2021 when Safety Line was acquired by SITA, the world leader in digital solutions for air transport.

GLOBAL COVERAGE THROUGH PARTNER INVESTMENT FUNDS



OVER
€ 100 M
INVESTED
in partner funds



RE.INVENT

Forecasting and exploring new territories

— A FIRST FIELD OF EXPLORATION: ADVANCED AIR MOBILITY (AAM)

Groupe ADP wishes to explore and make possible all the futures of carbon-free aviation. Low altitude around 300 meters represents a new strategic frontier that could reveal new uses for passenger transport between airports, in peri-urban areas and for health and medical purposes.

That's why, in September 2020, the group set about structuring an electric air mobility sector around **EVTOLS (VERTICAL AND TAKE-OFF LANDING)**. Under its impetus and in the space of three years, an ecosystem and a test zone unique in Europe and the world, as well as the first integrated flights in airspace, have been deployed.



OVER **1** YEAR
TEST CAMPAIGN

OVER **20**
TEST FLIGHTS
at Pontoise tested in 2022

200 KM
COVERED BY
eVTOLs, drones and small
electric aircraft in the skies of
Pontoise airfield.

RE.INVENT



A CLOSER LOOK AT THE MAIN STAGES OF THE PROJECT

- ◇ **OCTOBER 2020: LAUNCH OF THE "RE.INVENT AIR MOBILITY" CALL FOR EXPRESSIONS OF INTEREST** to structure an ecosystem around Urban Air Mobility (UAM) in Paris region, with the French civil aviation authority, RATP Group, *Choose Paris Region*, and the support of Paris Region) and announcement of the transformation of the Pontoise Cormeilles-en-Vexin airfield into a testbed platform.
- ◇ **JANUARY 2021: SOME THIRTY WINNERS CHOSEN** from 150 applications from 25 countries in various categories (vehicles, infrastructure, operations, integration into the airspace, acceptability).
- ◇ **NOVEMBER 2021: LAUNCH OF THE TESTBED AIRFIELD IN PONTOISE**, considered like a sandbox, with an initial campaign focusing on acoustic tests and the integration of drones and eVTOLs into conventional air traffic.

- ◇ **NOVEMBER 2022: UNVEILING IN PONTOISE OF THE FIRST FULL EUROPEAN VERTIPOINT, INTEGRATING ALL THE AERONAUTICAL AND PASSENGER COMPONENTS**
(hangar, take-off and landing area, passenger terminal, control areas) to develop future electric aircraft services. Volocopter flight integrated into conventional airspace, cohabiting with another aircraft and showing the interaction between the passenger terminal and the eVTOL. In the medical field, a partnership initiated with the French Public Hospital Authority in Paris (Assistance Publique des Hôpitaux de Paris, AP-HP) to asset the conditions for a demonstration in a real environment from 2024 with the use of light aircraft for medical transport needs.

- ◇ **AND IN 2024: A WORLD FIRST THANKS TO A PARTNERSHIP** with Volocopter with the launch of pre-commercial services to coincide with the Paris 2024 Olympic and Paralympic Games. Vertipoints will be set up at different places: Paris-heliport, Saint-Cyr airfield, Paris-Le Bourget and Paris-Charles de Gaulle airports, and a site inside Paris city near the Austerlitz bridge on the Seine River. These pre-commercial flights will pave the way for the arrival of a new generation of eVTOLs, with a longer range and greater carrying capacity, by the end of the decade.
 - ▶ **The group's foresight activity can turn its attention to new areas: carbon-free regional aviation, airships, new energies, intermodality.**

Innovation Hub, five years and beyond?

— THE THREE TURNING POINTS IN 2023:
APPROPRIATION, INDUSTRIALISATION,
INTERNATIONALISATION

2023 is the pivotal year: the one that will see the whole of the Groupe ADP's innovation approach fully geared towards accelerating the zero-carbon transition of our airports.

APPROPRIATION BY THE BUSINESS LINES

The innovation approach is now mature, as the business units have begun to appropriate the levers of open innovation to transform their activities in order to meet Groupe ADP's major strategic priorities.

- ◇ **NEW SUSTAINABLE CONSTRUCTION METHODS AND PRACTICES** with the Engineering and Capital Project department:
 - **A new approach to business transformation and practices, a laboratory of ideas and projects, will be launched in the coming weeks, to make Groupe ADP a leader in this field.**

- ◇ **NEW EMPLOYEE EXPERIENCES AND SUPPORT KNOWN AS "FUTURE OF WORK"** with the Human Resources department and the Communications department:



**Stay ambitious,
even if it means
making mistakes,
to stay one step
ahead!**



► Initial experiments have seen the light of day to digitalize the employee experience and a dedicated working group, bringing together the diversity of the Group's businesses and profiles, will be launched in September to make proposals for concrete measures by the end of the year around the following major themes: employee engagement and loyalty, hybrid work organisation, digitalisation of HR practices, new work rhythms, new services for employees.

- ◇ **GREENING ALL OPERATIONS AND REDUCING ENVIRONMENTAL IMPACT** with Paris-Orly airport management.
 - To achieve the ambitious goal of zero net emissions on the ground in 2030, taken alongside some thirty partners in the airport community, Paris-Orly airport will create a dedicated space in the heart of the airport in 2024, open to everyone, including passengers, to test and share innovations.

INDUSTRIALISATION

- ◇ **GROUPE ADP'S OBJECTIVE REMAINS TO FREE INNOVATION**, so that the business departments can dare to propose, experiment and sometimes even make mistakes. However, the integration of industrialisation criteria as soon as an experiment is launched is intended to encourage a greater number of scale-ups, to the benefit of entrepreneurs and Groupe ADP teams.
- ◇ The criteria set before the launch of any experimentation are now as follows: maturity of the solution, economic viability of the partner, economic performance, operational optimisation and environmental benefits.

FIVE YEARS AND BEYOND?

► As part of the group's 2025 Pioneers strategic roadmap, a target of 120 experiments, including 30 industrialisations by 2025, has been set. This target also involves the airports in our TAV Airports network in the Middle East.

INTERNATIONALISATION

◇ After the age of maturity in Paris, it is now a question of ensuring that everywhere in the world where Groupe ADP and its partners are present (28 airports), it becomes a key player in the local innovation scene, with a clearly identified value proposition and playground, particularly for young entrepreneurs.

◇ 2019 marked the start of the internationalization of innovation with an **AIRPORT STARTUP DAY**, a pitch competition for startups at the heart of airports, held at Paris-CDG and Izmir in Turkey, alongside our partner TAV Airports. The aim is to network our innovation capabilities, with all their specific geographical features and expertise. To build this momentum:

► A network of 50 referents, the *Innovation Pioneers*, was set up at the end of 2022. Synergies in terms of expertise, targeting start-ups and experimentation could eventually be envisaged.

► *Innovations Days* will be held at the beginning of 2024, in three countries in our network in the same week, to accelerate the networking of our innovation know-how, and position ourselves everywhere we are present as a leader in airport innovation and a privileged partner of local innovation ecosystems.





GROUPE ADP

SHARING NEW HORIZONS

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