

The trend book digest



edition 2020/2021

cap-digital
Paris Region

Summary

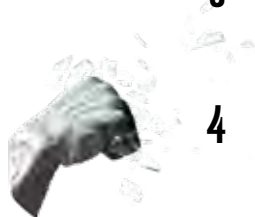


2

Summary

3

Edito



4

Impacts

6

Sustainable city



10

EdTech and talents

14

Cultural and creative industries



18

Health

22

Technologies, data and IA



26

Retail

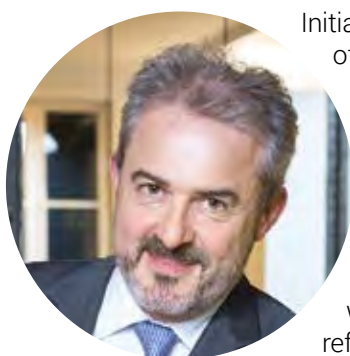


30

About Cap Digital

Editorial

The Trend Book that you hold in your hands or discover on your screen, is without doubt, a specific vintage.



Initiated on the twilight of the “world before”, written in full lockdown, and presented at the very moment where the epidemic crisis subsides in France, but accelerating worldwide: this mapping reflects who we are: profoundly marked by the

crisis.

This temporality has also plunged us in a dizzying exercise. To project oneself into medium-term and challenges of the major ecological and digital transitions that our members are addressing, even though large part of our energy was focused on the emergency: the support to be given to our start-up and SMEs members to help them overcome the violent economic impact of the crisis.

Vertiginous but salutary exercise. For one thing, because our members and experts have wonderfully responded to the call. Alongside our permanent team, they are more than one hundred to won the time during lockdown, and while some of them were affected by the disease, to share with us their visions and practical experiences, and I would like to thank them very much for their involvement.

Also, salutary because we have been able to make an implacable assessment, throughout this collective analysis. This crisis has represented a way of speeding up the deployment. What was merely a trend or experiment was deployed on a wide scale in few days. Our agility, our ability to hybridize tools, to work collectively to invent solutions often “out of the box”, have allowed us to continue to communicate, to work, to buy, to learn, to distract us... From this point of view, and even if our entry into the

Anthropocene era occurs during this crisis, it is indeed a kind of crystallization of a long and complex period of transformation we are witnessing.

Resilience, hybridization of skills, inclusion, responsible and impactful innovation, European Digital sovereignty and the end of a blind belief in a technological solutionism are some of the strong markers that you will find throughout the chapters of this Trend Mapping. They are also the bases of our conviction, tremendously reinforced during the last months: it is by bringing together companies, the academic world and territories that we will be able to build a sustainable future. Responsible innovation such as that we are leading is based on this model of multi-actors, where the skills of everyone are hybridized to allow for the convergence of economic performance and social and environmental impact.

Even more than in the previous editions, this 2020-2021 Map reflects the DNA of Cap Digital, this crossroads place and collective construction where researchers, entrepreneurs and public decision-makers gather: from the outline of the most concrete possible action strategies for action possible to the deployments of innovative projects on the territory, we are building collectively, from the most local to Europe, other possible futures.

Charles Huot
President of Cap Digital



“

We hardly believe in the plagues once they fall onto the head. ,,

Albert Camus, *La peste*



Impacts

A “total social fact” which sends us back to our vulnerability

The “total social fact” concept, under which the anthropologist Marcel Strauss referred to the phenomena that mobilize the whole of society and its institutions, was mentioned to qualify the lived experience in the Spring of 2020: the sudden lockdown of the economic, the disappearance of our freedom of movement, the social distancing. In this suspension state, all the weaknesses of our society have been revealed, as in a kind of freeze frame. The unsolved crises, tensions that have not subsided, everything from which we had looked away appears to us again.

First, the deep divisions in the social part: between the teleworkers in the jobs of service, and those who make our life simply possible, with undervalued and lowly paid work ; between the volunteer confined in their secondary residences and the ones with the bad accommodation in neighbourhoods so desperately struggling.

Then, the fractures in the way to grasp the collective fact and the general interest: a crisis of confidence in the authority, sensitivity to conspiracy theories, low adherence to any form of control that might be suspected of surveillance attempt.

Everything in this world's crisis, seems astonishing to us: the speed with which the disease has spread, sign of intensity of our communications, as well as the speed with which it has been identified and its genome decoded. More unexpected maybe: what was once an almost militant conviction of a minority, has become a

much more widely shared feeling: there is a link between the economic globalization that does not stop, the social divisions, the irreversible degradations caused to the biosphere and our health.

The philosopher Edgar Morin puts it in these words: “the overwhelming revelation of the upheavals we are experiencing is that everything that seemed separated is connected, since a health catastrophe catastrophizes in chain all that is human”.

Human activity has led to the disappearance of 83% of wild mammals and 50% of known plants. Wild spaces do not account for only 23% of the earth's surface (against 85% a century ago). Deforestation of primary forests has brought humans closer to rich natural systems in pathological agents, and capable of crossing the species barrier.

It is indeed the imprint of man on the planet that is in question.





Sustainable cities

Urbanity in pandemic times: everything to reinvent?

We have just getting through time of trial, but the worst was yet to come: combining economic recovery and ecological transition, bringing together health care, city lifestyles and sustainable solutions.

Our urban area, before and after the lockdown, is going to change: how to reclaim space, and better involve the citizens to rethink cities?

These are our questions this year, around four structuring trends: the new urban models and their governance, data sharing and implementation of urban modelling, the greening and biodiversity, and, finally, issues of decarbonization and energy efficiency.



Focus

Spotlight on: project call "Building a future, living the future" of the Paris Region

Cap Digital is partner of the winning project "Building a future, Living the Future" of the national call for projects "Innovation territories" launched by the Banque des Territoires. Led by the Paris Region in consortium with 120 partners, with a budget of 310 million euros over 10 years, it aims to:

→ **Improving the living conditions of Ile-de-France residents and therefore the attractiveness of the Region** (fight against air pollution, greening neighborhoods with innovative solutions, housing and public services designed for more fluid use) by meeting the needs of its inhabitants.

→ **Reinforcing the competitiveness of the construction industry**, especially the SMEs and microenterprises, by accelerating their digital transformation and fostering the circular economy in the building sector.

→ **Designing and implementing the industry of the building 4.0** by creating support fund for start-ups of the sector, or by facilitating the creation of a modular construction factory. The aim is to promote a new industrial momentum to create the jobs of tomorrow in the Region.

This program focuses on action and aims to build the industry of the future with the people of the Paris Region. It is innovative, green, modular and closer to the uses of its customers and end beneficiaries. As a member of the core team, Cap Digital is guarantor of the consortium's innovation approach, and will aim to follow and support the actions throughout the project

And the European Project AI4CITIES "Capitalizing on the AI to reduce drastically the carbon footprint of cities"

Coordinated by Forum Virium, the "smart city" unit of the city of Helsinki, this large-scale program, launched in January 2020, aims to help European cities develop revolutionary solutions of artificial intelligence to reduce drastically their greenhouse gas emissions and achieve their goals of climate neutrality.

In order to achieve this, AI4CITIES intends to launch pre-commercial procurement by selecting funded start-ups to develop and validate the innovative prototypes based on artificial intelligence and other emerging technologies.

www.ai4cities.eu

→ **Project duration: 3 years**

→ **Total budget: 6,6 million €**

→ **Partners: 7, from 7 countries of the European Union**

Interview



Vincent Maret

Director Open Innovation, Groupe Bouygues

"Imagining the city of tomorrow by putting people and uses at the centre and in a range of application from the neighborhood to the territory"

How does the group Bouygues position itself on the topic of smart and sustainable city?

The group Bouygues has identified four "mega trends" that structure the whole of our actions such as presented in our integrated report: demographic growth and urbanization, climate change, digital and technological transformation, and the evolution of users practice. The latter point is worth emphasizing, it commits to moving from a product approach to uses. The approach is interesting on the topic of the smartcity that benefits from an implementation that puts the humans and the uses at the centre.

The Smart city is obviously a fundamental topic, that we've been seeing since 2008. In France, 180 Smart city programs have been launched since then by the 40 largest agglomerations, for a cumulative investment of 3,5 billion euros (according to a Xerfi study). In 2018, 33 launched projects had been counted, a number that doubled in five years. Increasing community involvement on the topic and we've observed an intensification of projects, especially in France. And in this context, Bouygues is of course very committed through its three entities Bouygues Construction, Colas et Bouygues Immobilier, but also with the support of TF1 and Bouygues Telecom.

What is the right approach to drive a Smart City project?

It is very fundamental to take into geography account when talking about smart city. The approach must be both global, in order to benefit from productivity gains on the scale of several projects, but above all local, as each project is unique. The Smart city of Singapour or Tianjin cannot be the one of Dijon or Angers.

It is interesting to have observed the approach evolutions on this topic. The firsts fields of action of the smart city concerned first operational improvements (lighting, mobility...) the aim of which consisted

especially in doing scale economies. Then we saw the arrival of exogenous players in the construction market, with a sometimes "disembodied" approach to the smart city, very "technological, IT". The project from Google to Toronto that was just abandoned could have been perceived this way even if it include a large concertation approach. Our group has the ambition to imagine tomorrow's cities by putting humans and uses at the center and on a large application field going from the neighborhood to the city.

What are the examples of innovations brought by Bouygues which illustrate the evolution of the sector?

Regarding the sustainable construction, Bouygues Construction built in Grenoble the first building concept ABC "Autonomous Building for Citizens". This is a comprehensive approach to sustainable, autonomous housing with a high social value that will bring together innovations that will be applied in the works of tomorrow. Our entrepreneurial program has also to the emergence of the EHEP supply: a positive energy building that has received the label "Solar Impulse Efficient Solution", awarded by the Solar Impulse Foundation. It is about designing the building not as an object isolated in the city but which places itself at the intersection of flows: of energy, people, materials, that are which pass through and that connect the city with itself. It is a very interesting approach that resonates with the circular economy, multimodal transport, energy efficiency.





EdTech & talents

The EdTech in the lockdown era, between convergence and versatility usages

On March 17, 2020, as the world lockdown, the boundaries between the professional and personal life disappear. A few days later, more than 180 countries closed their schools, affecting 87.4 % of the learners, or more than 1.5 billion pupils (EdTech Hub and Digital Pathways of Oxford). The home becomes the point of convergence for working, private life and education. The familial cell digitalizes and becomes the theater's life in all its components.

The EdTech, most of which still remain to be adopted, become central tools for everyone. With videoconferencing platforms, the social and professional ties are being re-formed. The digital technology is invading daily life and revealed new uses to meet the issues of pedagogical follow-up, from training and remote work in the world.



Focus

Light on the call for projects Innov'up Expérimentation Campus IA from the Paris Region to the Paul Valéry high school (Paris 75012)

This call for projects "Campus AI" led by the Paris Region, plans the creation of France's first "AI High School", aimed at raising awareness and train 200 pupils starting from the class of Seconde onwards, in the tools of software development as well as mathematical and statistical fundamentals.

In order to enable "educative revolution", the Region has selected, through this call, a handful of companies that will be able to experiment their innovations at the Collège-Lycée Paul Valéry (Paris 12e). A major part of the AI 2021 plan of the Paris Region, this "AI Campus" is being realized in partnership with the Ministry of Education. It is thus part of the Region's policy of supporting innovation, carried out with Bpifrance.

Asked to operate this call, Cap Digital's teams use their expertise in the operational follow-up of the experiments and their good integration within the Paul Valéry High-School.

- **Experimentation field: lycée-collège Paul-Valéry (Paris 12e)**
- **Theme: train to AI and train by AI**
- **Budget: dedicated support program (Innov'up Experimentation call for projects) 500k€**
- **The total budget for the renovation of the Campus site (Collège-Lycée Paul Valéry) is 60 million euros**
- **The 5 selected winners: Impala*, Evidence B*, Tralalere*, Learning robots, Didask**

**Cap Digital Members*



Model of the Fab Lab School complex Paul Valéry, Paris 12e

Interview



Pascal Bringer
CEO and founder of Maskott

"In e-learning, one of the main challenges today is to provide effective tutoring "

**Is it still possible to separate the learning education and continual training?
Isn't adaptive learning a life-long training?**

Indeed, Maskott improves and facilitates the learning process throughout life. From primary school to the world of the company, it offers innovative pedagogical solutions that are indispensable for training of today and tomorrow.

Its "Research" division leads innovation programs in subjects such as learning data analysis or intelligent tutorial systems, a prerequisite for Adaptive Learning.

Tactileo, the Digital Learning platform edited by Maskott, has been designed to meet the needs of the new user interfaces by integrating touch from its initial design. A solution that allows increase student and/or trainee engagement through individualization and playfulness training courses.

What is the consequence of the crisis in the distance learning?

The economy digitalization affects today the education sector in a dramatic way. The uses have been accelerating and the crisis has been a catalyzer. For our part, we have noticed an increase of more than 700% in the use of the platform with 20 000 new teachers registered. The platform is accessible to all schools, middle-schools and high-schools. Today there are 800 000 teachers in France and 120 000 are connected to the platform. The lockdown has also developed the request of companies, institutions and universities that have digitalized a significant part of their training.

E-Learning is increasingly used through the world. For our part, we have thus integrated our Tactileo solution to Microsoft Teams for the training markets and to provide the opportunity to a stronger complementarity between tools massively used.

As a content creator, does technology come in support of usages or do you identify technological trends that are disrupting the learning processes?

Maskott is a multi-award winning LMS (learning management system) platform for content creation. LMS training platforms have become commonplace for virtual classrooms and learning with educational content. In addition, MOOC or fast learning as well as micro-learning are being installed.

There is a demand for short training content, particularly adapted to mobile terminals. The gamification of training content is also a noticeable trend, going hand in hand with adapting e-learning content to the mobile format.

One of the main challenges that the online training professionals must face today is to provide an effective tutoring, which is key factor of commitment and success. The virtual classroom is considered to be the best tool for learning, but it is also important to have good distance learning teachers and content adapted to each individual.



Creative and cultural industries

How to recover from this pandemic in a society of physical distancing ?

The economic weight of culture, is about 2,5% of the GDP. matching the agri-food industry (two times greater than the automobile industry), including connections with other sectors (tourism for example), and generate strong positive externalities on territories identity. CCI will be one of the most affected sectors by the crisis, with an estimated loss of between 8 and 10 billion euros turnover. And despite the State aid that will help to cushion the shock, the announced economic disaster announced will leave a severely deteriorated sector in search for new axes for reconstruction. However, there are reasons for hope, in the innovative and original uses that have emerged. It is up to us to take care of these new companies.





Interview



Benoît Maujean
Head of Innovation, Mikros

"We have to take over in our hands our destiny around these technologies, encourage the digital sobriety"

The sector of the CCI is highly affected by the crisis. Do the first emergency measures announced by the government seem appropriate to you?

Yes, we have welcomed the current specific aids, or to come, brought to the CCIs by the Government, thanks in particular to the consultations conducted with the FICAM, our professional union. But to make this support even more meaningful financial, it is just as important to think together on how to reinvent us start again in this difficult post-lockdown context. In a large majority of sectors, this is going to accelerate transformations. The reflection we have carried out within Cap Digital to provide our support in the development of an industrial sector policy for the CCI take on their full meaning. Defining and leading collectively the structuring projects of an industry must allow us to better respond to the explosion of increasingly diverse and personalized uses.

According to you, what are the most structuring issues, the one that will have the most leverage effect on the refoundation of the sector?

We worked within Cap Digital on five high impact proposals. I would especially like to mention the one that regards the crucial issue of valorization of metadata. It is about setting up workflows that propagate the circulation of metadata throughout the production chain.

By relying on open standards that perpetuate data models and allow the deployment of decentralized and secure infrastructures in the various information systems of all stakeholders in the production chain and distribution of work. With issues of productivity, reliability of processes, better remuneration for beneficiaries, but also sovereignty. We must take our destiny in hand around these technologies, encourage digital sobriety.

In fact, Cap Digital strongly defends concepts of digital sobriety, pooling, of reuse. Do you have any examples of how can this translate into CCIs?

For me, one of the most emblematic examples is that of the digitization and virtualization of places with strong narrative power. The more or less distant future of the film industry at large (all screens included) will see a large number of projects competing for the shooting scenes available in our beautiful country, with small teams, limited international travel, and limited contact with key personnel. The virtual set solution, hitherto reserved for high-end productions, involves sets where teams do not have to travel, where the environment can be controlled and where economies of scale can be achieved. The digitization of these emblematic places also brings with it challenges for the tourism sectors (immersive virtual tours), fashion (shootings in digital sites) or trade and advertising (highlighting brand value in places in accordance with their values). The digitization of these emblematic places also brings with it challenges for the tourism sectors (immersive virtual tours), fashion (shootings in digital sites) or trade and advertising (highlighting brand value in places in accordance with their values).

I think the collective structured by Cap Digital has all the assets to meet all these challenges, relying on innovation stimulated by the creativity of actors in the CCI value chain.



Weight:

170 lbs

80 / 120

DOCTOR'S OFFICE



Health

What if the crisis had given us all the keys to reinvent our health system?

The coronavirus pandemic is a technological and innovative experience, globally in all sectors but especially in the health sector. It has been a catalyst of technology uses and also revealed well-known challenges of the stakeholders in a more striking light. The whole issue is now to learn the right lessons to be able to get out of this brutal but creative sequence “on top”. Rationalization, structuration, valorization of the data and impact assessment in real life appear as so many tracks to structure the innovative digital chain.



Focus

Spotlight on the call for projects "Improvement of medical diagnostics through artificial intelligence"

Led together by the **Health Data Hub** and the **Grand défi Santé**, the call "Improving medical diagnostics with the artificial intelligence" marked the first half of 2020 with two successive waves (January and May).

This call is addressed to public institutions, companies and associations and welcomes both single projects and multi-partner projects.

With the key to retained projects:

The projects selected will receive funding of up to 300,000 euros in the form of a grant over a period of 12 to 24 months and operational support.

Cap Digital's teams and experts were strongly mobilized on this call, which was very well received by our members. No less than 12 projects have been evaluated by us and 4 of them have received the Cap Digital label.



“

This call aims to support the development and implementation of artificial intelligence algorithms using health data to benefit the health system.”

Stéphanie Combes, Director of Health Data Hub

Interview



Julia Neguer

Head of Healthcare & Life Sciences Strategy at Dassault Systèmes

"Digital twin: allowing the deployment of prevention on a very large scale, while accelerating the progress of the precision medicine"

In February 2020, Dassault Systèmes distinguished itself by placing a digital twin project of human body at the heart of its strategic roadmap. Why such a choice?

Historically, the way in which Dassault Systèmes has made it possible to support the transformation of industries such as the automotive or the aerospace, has always been based on the creation of common baselines allowing a group of collaborators from different disciplines, to have a same shared vision of a given system, to be able to capitalize on their knowledge and skills and to use a single base to imagine and create innovative solutions on the basis of models and simulations. The digital twin is fully in line with the heritage of this common baseline.

In the health field, the relevance of this model is crucial. Why? Because in order to understand the how the human body works, in good health or in the context of disease, we need to bring together medical and scientific disciplines that are extremely different and furthermore require a holistic approach to the individual, his or her experience and context.

In concrete terms, what do the health innovations, that take full advantage of the digital twin, enable today?

Currently, we mainly help health industries (pharmaceutical and medical device industries) to develop innovative therapies. This translates into the use of digital twins in integrated solutions of our clients to allow them for example to understand the cellular, molecular or physiological mechanisms that contribute to a pathology and in identifying potential therapeutic targets ; to design innovative molecules, cellular therapies or personalized prostheses ; to accelerate the development process and clinical trials or to create synthetical control arms.

All these assets and this experience have helped us to push further the digital twin experimentation in

health. For example, we have developed a multi physical and multidisciplinary model of the heart, which allows us to carry out virtual tests useful for stenting coronary arteries.

We also participate in research programs on epilepsy by using a digital twin of the human brain to identify zones that are the causes of the crisis. In which zones do they trigger? How do they propagate in the brain? These works also enable to simulate potential interventions and to understand the impact.

And in the longer term, what could this technological turning point allow?

In the longer term, one of the greatest contributions of the Virtual Health Twin is its ability to federate a complex ecosystem and help catalyze the transformation of health systems to improve healthy life expectancy for each individual through personalized medicine and large-scale targeted prevention. That's the goal of our work: to provide a platform for healthcare professionals to visualize, test, understand and predict what they can't see - from a patient's risk profile, the effect of a drug on his or her disease, to the results of surgery - even before the patient begins treatment.

Of course, this vision is also based on a necessity: put the patient back in the center of all the discussions. Trust, considerations ethics and the protection of data and privacy are absolutely essential for the transformation of health systems that would be driven by prevention, personalized treatment and better adapted to the needs of populations.



Technologies data and IA

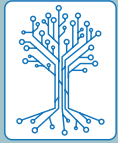
A forced-walking digitization, the future requires us

In some months or years, what will we remember from the Covid-19 crisis? Probably that it was the trigger of the emergence of a new world.

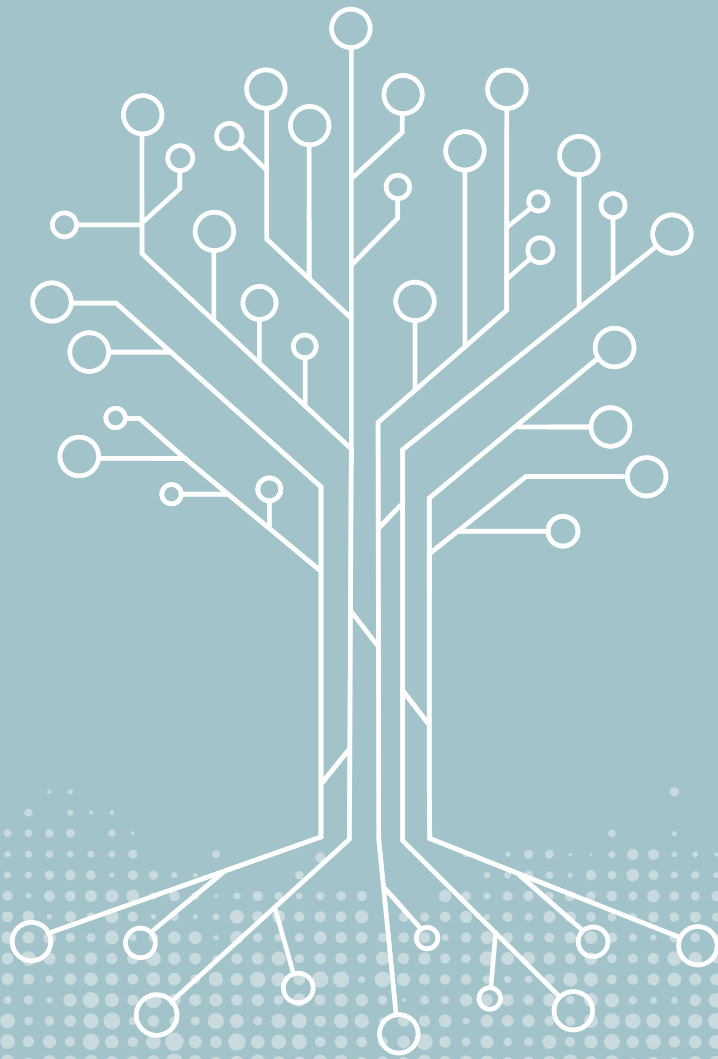
In this unprecedented period, digital technology has played a new essential role in order to maintain a virtual, social and professional link by the adoption of digital tools which would take months to be deployed.

The analysis remains to be done. However, it will no doubt to be remembered that the technological solutionism that often permeated technological foresight is no longer appropriate: it is indeed individuals, researchers, entrepreneurs, doctors, who have been able to get around the constraints, adapt algorithms, open up data. "Putting the human back into technology" has gone from the status of a mantra to reality, the need to hybridize everything and at all levels, to work transversally, has clearly emerged as vital. Let's bet there will be something left of it.





GAIA-X



Interview



Anne-Sophie Taillandier

Expert in Big Data and IA, Director of TeraLab IMT Institut Mines-Telecom

"Gaia X should contribute to foster European portability and protect digital assets"

What are the evolutions of the companies' profiles that wish to exploit data?

Over the last three years, we have seen the arrival of entire sectors and not just companies.

If we take the example of the automotive industry, a manufacturer needs to be able to share its data with suppliers or access their data in the context of manufacturing. For the past two years, we have also been seeing an increasing number of SMEs and mid-cap companies thanks to the Pack IA, the support system for SMEs set up by the Ile-de-France region, of which TeraLab is the co-pilot with the France IA Hub.

TeraLab has more than 65 projects, including some very fine European projects such as AI4EU. The strength of TeraLab lies in the specific support of pre-competitive projects ranging from 3 months to 4 years. The essence of these projects is to think transfer of technology from the beginning.

Why is data a real issue for the industry?

When we look at the benefits in the medical field, a patient's environmental data allows for better acceptance of care. In fact, coupling clinical data with environmental data allows us to understand and personalize medicine.

If we look at the side of food distribution by working on end-to-end data by at the end of the value chain, the process from the cooperative to the final product can be optimized to collect product information up to the price.

Did Covid-19 logistical crisis act as big data accelerator?

The crisis has made it possible to justify that the started around data, its accessibility, its sharing is a necessity and it is essential to create standards and international cohesion.

Can we talk about the emergence of a cloud of European trust?

In Europe, we need to create a network of secure, sovereign clouds to administer same rules for data sharing, data portability and software portability.

The IMT and TU Munich are in charge of the Frenco-German academy for the Future Industry. In this frame, TeraLab was extended to the TU Munich in order to create the Joint AI platform.

Moreover, the IMT became in May 2019 the French Hub of Intern Data Spaces Association (internationaldataspaces.com). This collaboration, which had started four years earlier, corresponds to the need to finding technical solutions and standards that allow for a scalable approach for data sharing.

In the same line, Terra Lab/IMT was involved very quickly in GAIA-X, a Franco-German initiative led by Peter Altmaier and Bruno Le Maire, which aims to create European conditions of transparency, portability, reversibility, data, software, by putting forward the needs for sovereignty and protection of digital assets of European companies.

This work has been underway for 6 months and is made up of 22 members including cloud providers but also users and academics (official announcement on June 4th). By the end of 2020 the launch of the structure will be effective, and we will thus be able to have a transparent and sovereign European market of Cloud Trust.



Retail

Biggest challenges of a “as a service” retail: new commitment and business models

Unpredictability. It is the great lesson of the crisis for the retail sector. For years, humans were the key to physical retail. Yet, the crisis and the lockdown have turned these markers upside down: the social bond, the community, the store as a place of exchange through human interaction.

“Are we going to enter an era of distancing and virtualization of exchange?” as Cédric Ducroq, CEO of Diamart Group asks himself; or are we moving forward with more commitment to future generations, even the idea of progress seems no longer a dream come true? The economic pause imposed by the lockdown offers the retail stakeholders the opportunity to rethink what is useful to our society by reinventing business models.



Focus

PICOM by Cap Digital, at the heart of the first multi sectoral Chair: TRENDS

(Transformation of Retailing Ecosystem(s) & New market Dynamics)

What (r)evolutions for the distribution? Launched at the end of 2019, financially supported by the MEL (Métropole de Lille) and the I-SITE, the TRENDS Chair is made up of the University of Lille, Leroy Merlin, IDKIDS, Picom by Cap Digital and is supported by the Professor **Isabelle Collin-Lachaud**, director of the lab LSMRC EA 4112 (University of Lille)

This project, which involves public and private partners, addresses important issues for the distribution sector in France and internationally, to better understand the transformations but also the strategies to adopt in the light of the fourth industrial revolution.

The Trends chair is co-building a collaborative and innovative research approach, and conducting multi-disciplinary studies, documentaries, qualitative and quantitative), thanks to a network of international experts around four themes:



→ (Re) Legitimization of the sector and distribution players in the face of consumer mistrust

→ Functions for the physical store in an omni commerce path

→ News “business models” and emerging markets

→ The organizational and cultural of companies



trends.univ-lille.fr

Interview



Laetitia Dablanc

Director of the Chair Logistics City and PhD from Ecole des Ponts-ParisTech

"The period that comes may call into question the methods used and the management of the supply chain"

Nine weeks of lockdown and France in slow motion, what has this exceptional period shown and what impact has it had and what developments are expected for the retail sector?

With the closure of all bars and restaurants and all shops, the Ile-de-France delivery and collection activity collapsed by 50% to 60% at the start of the lockdown. Then, as the weeks went by, fast food chains and restaurants started to offer takeaway or delivery meals the example of the chef Pierre Sang in the 11th district of Paris or the Rungis market which put a home delivery service online. Collaborative home-delivery (between private individuals) of the Yper type is being installed in the landscape. Non-food e-commerce remains at 10% to 20% of its level at the beginning of March, despite the closure of Amazons warehouses, with strong increases for DIY and gardening, fashion and accessories.

Has there been a boom of logistical platforms?

Platforms such as Deliveroo experience a revival around the period of Easter, but overall activity remained 30% to 40% lower than before the lockdown. Several transporters left their usual markets with the request for sanitary equipment delivery and in the food sector especially. Ile-de-France residents, tired of shopping and cooking themselves, ordered more dishes and also turned themselves to the e-commerce (computing, DIY and gardening articles, grocery). Despite everything, the B-to-C remains lower in our country than in the United-Kingdom and has never compensated the global fall of volumes. The impact of the crisis on transport companies has been strong and is reflected in the disorganization of flows, which has an impact on route optimization. There are more empty returns.

What issues for the after world?

In addition to the subjects of work organization and the gradual resumption of activity, companies and all transport and logistics professionals will have

to use this period of confinement to reflect on the "next world". For the Logistics City Chair, the period ahead may put the "next world" back into perspective because of the methods practiced and the management of the supply chain. It also raises questions related to the role of technology in urban supply management (robots, drones, massive data of goods flows connected with those of the smart city), clean deliveries or the carbon footprint of logistics in large cities.

Are these trends identical abroad?

The increase in home deliveries, food and non-food, related to the lockdown is stronger in the UK, Germany or the US than in France.

New home-deliveries services have been introduced in New York: almost all pharmacies now deliver and the city hires taxi/uber drivers to deliver food – but reconverting commercial supply chain in residential supply chains poses numerous problems...

In China, digital delivery platforms services like Meituan and Ele.me had increase during the lockdown and have remained very high since then: Meituan employs roughly one million auto entrepreneurs of delivery per day.

In Korea, in total, during the lockdown (January to March), we observed a strong resort to online deliveries for food: a typical family of Seoul received 3 to 4 boxes every second year, from companies like Coupang (subscription of 3\$ per month for illimited deliveries) or Costco Korea. In this country, there was a total 17% of growth in express (B2B and B2C parcels) and lunch-deliveries in mid-April 2020, compared to February 2020.

About Cap Digital

The biggest cluster for digital transformation in Europe

Since its founding in 2006, Cap Digital has been at the heart of a tremendous movement that gathering all actors in innovation: start-ups, research laboratories, small, medium and large companies, mid-cap companies, schools, universities, territories and investors.

Alongside our **1000 members** and enlightened by our network of experts, we are at the forefront of the future and support this new industrial world that is emerging before our very eyes. This preferential position gives us a fundamental role. A role of facilitator and initiator that consists of uniting all the actors of the digital economy and sustainable development (and even more) and makes them work collectively to carry their visions, their innovations, their prototypes, their projects, their technologies and their services beyond everyone's expectations.

Hybridization as a driver in changing

In this sense, Cap Digital is a **unique** network of innovators: an interdisciplinary structure which is based on the triptych Companies - Territories - Research and which has the capacity to hybridize the sectors that make it up: the city, health, commerce, culture and media, education and training.

Cap Digital is an **essential** network, that brings together the entire value chain, from research to experimentation until access to the market. **Useful**, our collective has acquired its legitimacy over the past 15 years, capitalizing on strong expertise, providing a leverage effect to companies and offering international influence. The key is **agility** by inventing new tools for the collective (Futur.e.s festival, French Tech pass, digital challenges, etc.), and integrating two other competitiveness clusters: Advancity in the field of sustainable cities and PICOM in that of trade. Cap Digital has succeeded in implementing the transversality of digital and ecological issues.

Finally, Cap Digital is the bearer of a European ambition, signed with great success, with projects such as DAPSI on the issues of trust, privacy, ethics and sovereignty or even as AI4CITIES on the sectoral interdisciplinarity of AI for the sustainable city.

From local to global: we support responsible innovation

Member of a dozen European projects, Cap Digital is bringing together the actors of the future EDIH (European Digital Innovation Hub) on the sustainable and human city within the SUMITY project (SUStainable & hUMAN CITY). Acting for responsible innovation, turned towards the territories and its inhabitants, Europe, it is Cap Digital's moto.

The Paris Region, the Haut-de-France Region, the government and Europe rely on our collective to make the necessary changes for the development of our economy and our society. Join us to make your innovation, development and transformation activities part of this beautiful mission: to think, to build and develop collectively an inspiring future. The one which build the world, the territories and the cities in which we will live tomorrow.



www.capdigital.com/en



facebook.com/capdigitalparisregion/



[@Cap_Digital](https://twitter.com/Cap_Digital)



[Cap.Digital](https://www.instagram.com/Cap.Digital)



medium.com/cap-digital

Cap Digital Key figures

Collective 

1000+
valued
members

15
years



120+
events
organised in 2019

12 000
visitors
on Futur.e.s in Paris
festival 2019

Team



120
Experts

40
Employees
(permanent staff)



R&D 

3014
R&D projects
received since
2006 including

1624
Labelled projects

856
Funded projects

Acceleration 

1 Bd€
raised by our
startup & SMEs
in 2019
including

72%
through our R&D
and business
acceleration
services

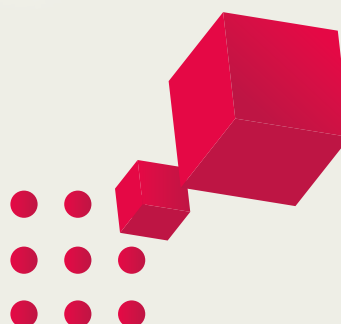
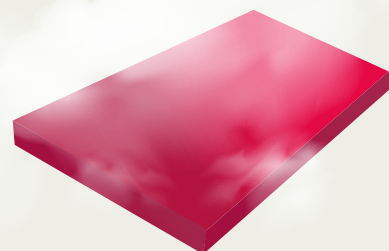
Digital
Transformation 

100+
qualified
connections
startup / large companies
in 2019 through
our programs

Europe 

40+
European projects
in which Cap Digital is
involved since its creation
(as coordinator or WP
leader) including

12
for 2019 alone



14 rue Alexandre Parodi 75010 Paris
www.capdigital.com

They support our action



LE PROGRAMME BÉNÉFICIE
DU SOUTIEN DU FONDS SOCIAL
EUROPÉEN ET DU FONDS EUROPÉEN
DE DÉVELOPPEMENT RÉGIONAL

