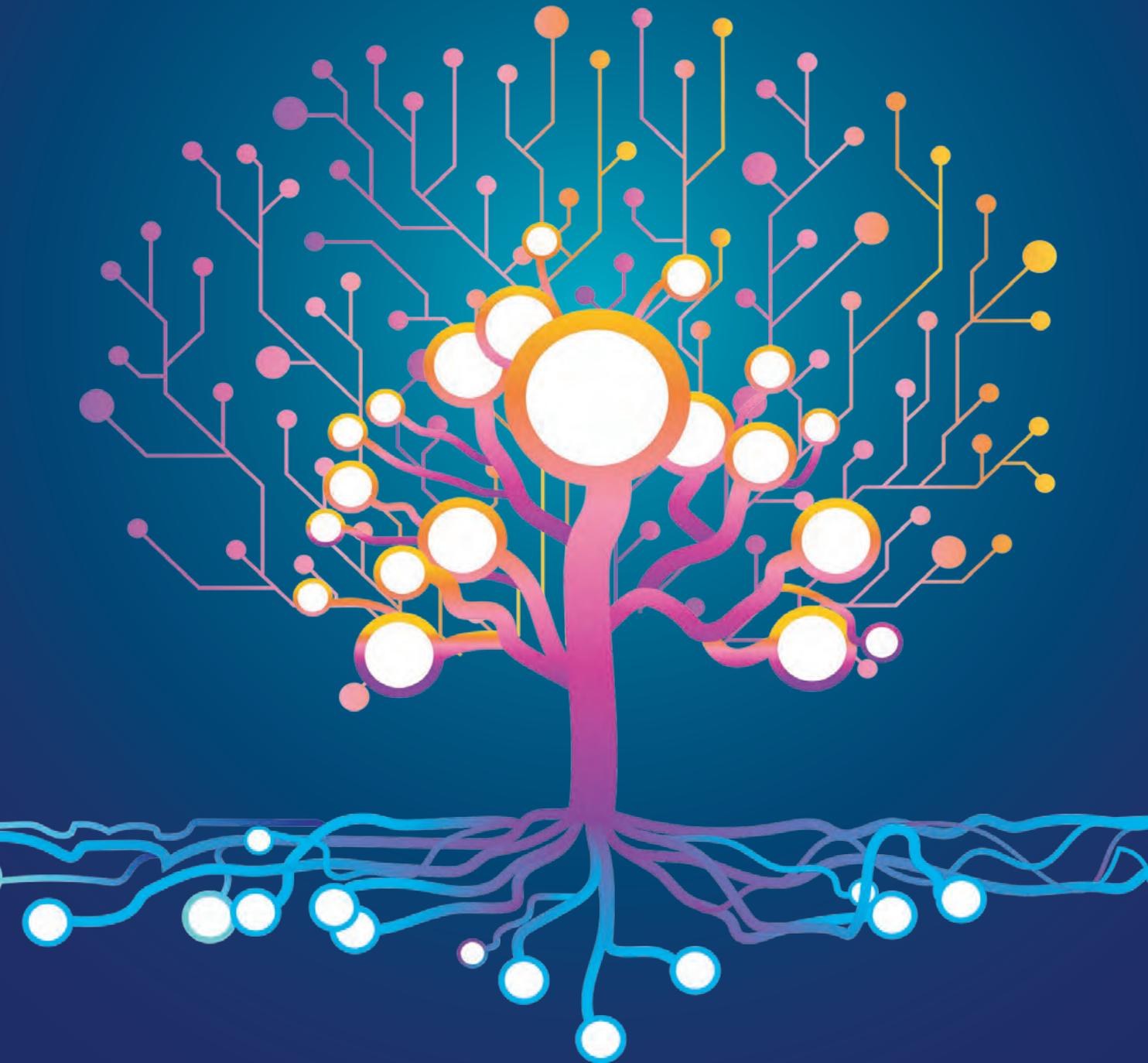
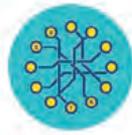


European Tech Alliance

THE STORY 2019





European Tech Alliance
THE STORY 2019

European Tech Alliance – The Story

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The European Tech Alliance "family picture" at the Annual General Meeting (AGM)





European Tech Alliance

THE VOICE OF
EUROPEAN TECH



#TECH4EU

Brussels, May 7th 2019



“

The European Tech Alliance is a big opportunity to have a voice in Europe that will help the rise of the European Digital industry, because the world needs a strong Europe in Digital that can help the other industries to grow.

GIANPIERO LOTITO, IMPACT'19
KRACOW, POLAND – MAY 22ND 2019

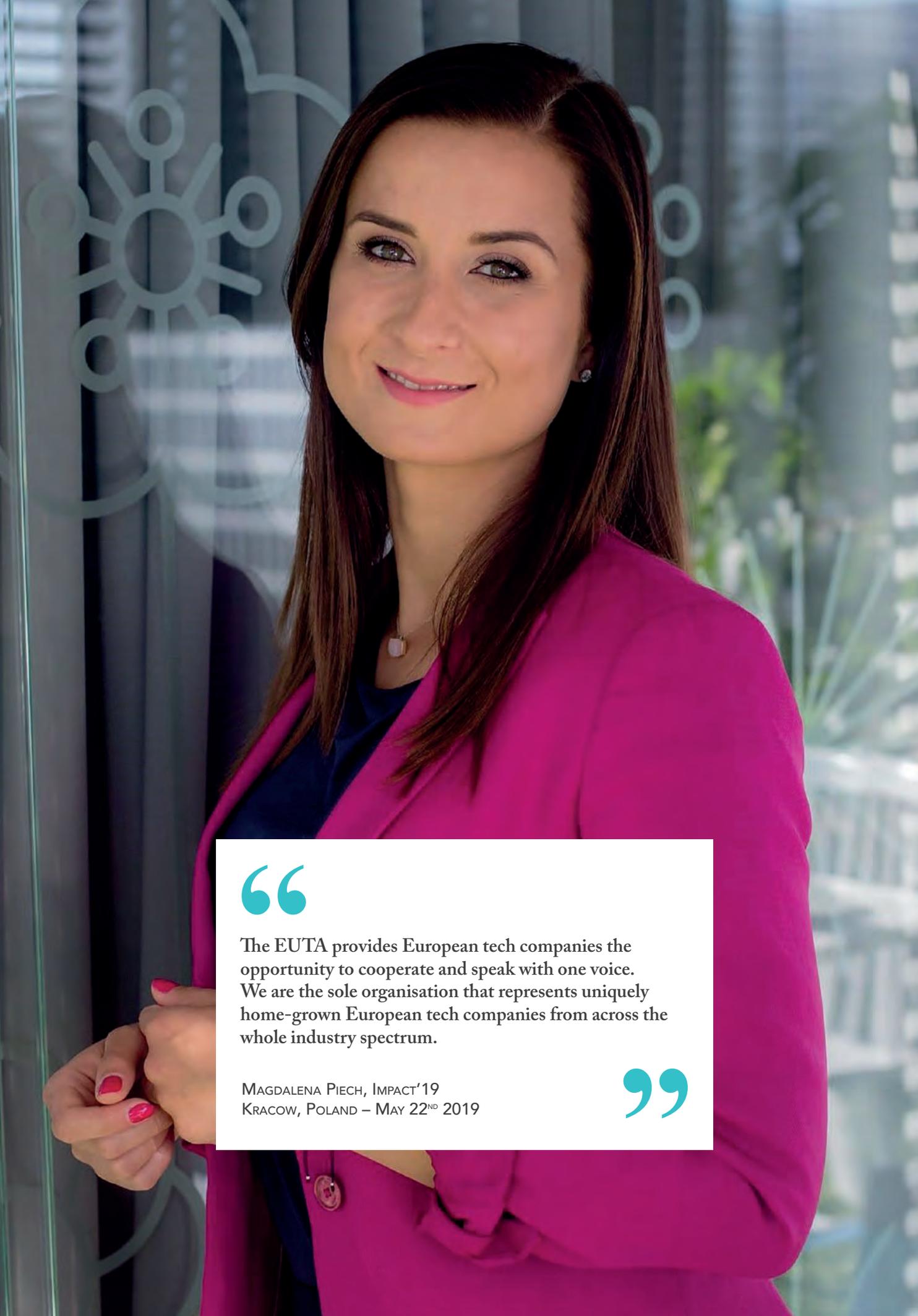
”

Welcome by Gianpiero Lotito, President of the European Tech Alliance

Europe is a greenfield of opportunities for tech companies. The European Tech Alliance can support their growth by feeding a continuous dialogue with the policymakers and pushing them to set the conditions for the creation of a European Technology Industry. After many years as a follower, Europe can emerge stronger than ever. Certainly, Europe should not strive to make a copy of the Silicon Valley. European ICT is made up of industrial giants that are mainly service companies; tech platforms have only recently started to emerge. The “Old Continent” must start to build a structure that in FacilityLive we call “Small Valleys”, small technology clusters focused around our ancient academic institutions in which the economy of scale is replaced by the symbiosis of a small ecosystem, ideas shared more quickly and effectively across disciplines to create continuous innovation. Europe must create a common solution to ensure that the region is able to foster innovation and encourage the growth of “Made in Europe” tech companies. Policymakers must understand that the digital industry has a central role in today’s world and that they need to grow it like the other strategic industries of the Continent, like the US and the Far East do. This is the only way to have a balance and to become truly competitive in Europe.

Gianpiero Lotito

President of the European Tech Alliance



“

The EUTA provides European tech companies the opportunity to cooperate and speak with one voice. We are the sole organisation that represents uniquely home-grown European tech companies from across the whole industry spectrum.

MAGDALENA PIECH, IMPACT'19
KRACOW, POLAND – MAY 22ND 2019

”

Welcome by Magdalena Piech, Chair of the European Tech Alliance

The European Tech Alliance consists of the most exciting and fastest growing technology businesses in Europe. Tech entrepreneurship is one of the most powerful drivers of job creation and economic growth in Europe, the European Tech Alliance exists to help inform policymakers about the unique nature of scaling a technology-driven business in Europe and challenge mindsets about Europe, technology and the Internet. The European Tech Alliance also strives to raise awareness amongst European policymakers on how they can play a critical role in facilitating the success of European entrepreneurs in Europe and globally. Europe is a world leader in technology, over the past 15 years Europe has produced more than 40 €1B+ tech companies. Clearly, the potential and prospects of European tech entrepreneurship is ever-expanding. We strongly believe that the next set of truly transformative tech companies will come from Europe. The European Tech Alliance will do its part to facilitate the ecosystems' prospects by bringing Europe's tech industry closer to European policymakers.

Magdalena Piech

Chair of the European Tech Alliance

The European Tech Alliance (EUTA)

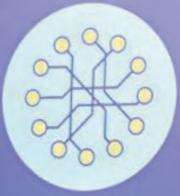
The **European Tech Alliance (EUTA)** brings together and gives a voice to the major European digital champions, scaleups, or leading startups that have been successfully built across Europe, with a total of **29 companies from 16 European countries**.

The EUTA was born to help Europe become the most innovative, globally competitive and fastest-growing player in the digital economy, underscored by European values shared by the members.

The Alliance's aim is to demonstrate that Europe has a vibrant and thriving home-grown tech industry through the combined activity of its members, and to contribute to policy discourse and developments which impact the European tech ecosystem. We want to help the continent grow, create new jobs, attract investment and improve the lives of European citizens.

Policymakers are faced with the challenge of understanding the diversity of the European tech sector, the business models it has produced, and above all the barriers it faces to scale. The Alliance is here to help: its membership includes music services, next-generation search and information management, mobile games, file sharing, dating platforms, e-commerce, mobility, and more. The Alliance seeks to become the **point of reference** and the **centre of knowledge** for the European digital tech industry. The mission of the EUTA is to use the members' collective experience of scaling digital tech companies across Europe to help shape the political and legislative landscape that will impact their businesses, their consumers, their employees and their investors. The EUTA members provide invaluable expertise and success stories to decision makers and global media in Europe.

The EUTA has arrived at a crucial time in terms of changes to the European digital landscape. Decisions made around strengthening the Digital Single Market over the next few years will have an enormous impact on all the sectors of the European industry.



European Tech Alliance

THE VOICE OF EUROPEAN TECH

CONFERENCE

... team wishes
... ful meeting!

els.com/eu

2015

The launch of the EUTA

The European Tech Alliance **was founded** by five high-tech companies Allegro, FacilityLive, King, Rovio and Seznam **and launched on October 27th 2015 at the European Parliament** in Strasbourg under the auspices of the European Commission. At its birth, the Alliance counted almost 30 European tech companies that were looking to scale up and be part of a growing European digital economy.

“We have formed an alliance to share our collective experience with policymakers and challenge mindsets about Europe, technology, and the Internet. There are so many European tech company success stories. We think we will be able to help European leaders understand that Europe is good at tech and show how policymakers can clear the way for the tech industry to grow further” said **Niklas Zennström**, the first President of EUTA and co-founder of Skype, at the launch event of the Alliance. European Commission Vice-President **Andrus Ansip**, who endorsed the creation of the Alliance, said: “I am delighted that the Alliance has come together to open a new line of communication with policymakers in the EU. Their experience of building businesses from the ground up in Europe will be an important contribution as we create a Digital Single Market.”

The creation of the EUTA was crucial for the European institutions that felt the lack of a group representing the voices of the European tech players. The Alliance’s launch was covered by **TechCrunch**, **Business Insider**, **Politico**, **Tech.eu** and many other media outlets across Europe.



Some moments of the EUTA launch event at the European Parliament in Strasbourg (October 27th 2015). In the last picture, Gianpiero Lotito with Niklas Zennström.

2016-2019

The early years

Since its foundation, the European Tech Alliance has established a reputation as the only forum where decision-makers can hear directly from European digital champions, scaleups and leading startups on all parts of the Digital Single Market agenda.

Through a series of meetings, roundtables, workshops and large-scale conferences, EUTA members have discussed major opportunities and challenges for their businesses and consumers with high-level stakeholders from across the institutions and the global media. Here are some of the highlights. **Startup Europe Summit 2016** in June 2016 in Berlin organised in collaboration with the European Commission, featuring many tech leaders as well as Commissioner Carlos Moedas and Commissioner Gunther Oettinger. In November 2016, at the inaugural **EU Tech Day** in Brussels, CEOs and senior executives of the EUTA members addressed the needs of startups with senior EU officials and national ministers including European Commission Vice-President for the DSM Andrus Ansip, Belgian Deputy Prime Minister Alexander De Croo, DG JUST Director for Consumer Affairs Despina Spanou and Members of the European Parliament Eva Paunova, Kaja Kallas and Catherine Stihler.

In September 2017, at the **ePrivacy Roundtable**, members of the EUTA presented evidence to MEPs on the ePrivacy Regulation and its impact on Europe's ability to grow and scale world-class tech companies. In January 2018, the EUTA sponsored the **Politico Playbook** event with Spotify Founder & CEO, Daniel Ek, interviewed by Politico journalist Ryan Heath, in front of over 300 Brussels' insiders, about the progress Europe has made in fostering a tech sector that can compete globally.

In June 2018, at **Forum Europe's Brussels Tech Summit**, EUTA hosted a private roundtable with policymakers to discuss Europe's role in the global data economy.

In May 2019, President Gianpiero Lotito and Chair Magdalena Piech, together with representatives from eMAG and Seznam.cz, represented the Alliance in a panel discussion at **Krakow's Impact'19 Conference** about how Europe can create better conditions to develop European Tech Giants and presented the Alliance to the Polish Minister of Entrepreneurship and Technology Jadwiga Emilewicz.



1) EUTA members in a group picture with Commission Vice-President Andrus Ansip at the EU Tech Day (Brussels, November 9th 2016).

2) EUTA members host the ePrivacy roundtable with the Regulation's rapporteur, MEP Lauristin (Brussels, September 18th 2017)

3) Daniel Ek, Founder and CEO of Spotify, interviewed by journalist Ryan Heath for POLITICO's Brussels Playbook (Brussels, January 10th 2018).

4) EUTA hosts exclusive roundtable with policymakers at Forum Europe's Tech Summit (Brussels, June 18th 2018).

5) Impact Cracovia 2: Dida: EUTA representatives at Impact'19 after the meeting with the Minister of Entrepreneurship and Technology, Jadwiga Emilewicz (Krakow, May 22nd 2019). From left: Fabrizio Porrino (SVP Global Public Affairs, FacilityLive), Francois Nuyts (CEO, Allegro), Gianpiero Lotito (Founder & CEO, FacilityLive), Magdalena Piech (Head of Public Policy and Regulatory Affairs, Allegro), Marta Mikilszanska (Head of Public Affairs, Allegro), Oleg Roibu (Head of Public Policy, eMAG), Tom Ruhan (Chief Legal Officer, Allegro) and Alex Kartsel (Country Manager, Bolt Poland).

6) President Gianpiero Lotito (FacilityLive), Chair Magdalena Piech (Allegro), Oleg Roibu (eMAG) and Michal Feix (Seznam.cz) in the Impact'19 panel discussion (Krakow, May 22nd 2019).

How the EUTA works

The Alliance takes a different approach to engaging with decision makers than traditional trade bodies. Its purpose is to share the members' knowledge and experience in workshops or high level meetings where experts can talk about technology, funding, customer experience, logistics and all the practicalities that actually make the companies successful and explain what they actually need in terms of policies and regulations.

The Alliance has also a set of recommendations and ideas on what the European Commission and the European Parliament could do to help the European Digital Industry grow and be successful globally.

EUTA is led by a **President** – elected for one year with a possible renewable mandate – that represents the Alliance in high-level events, stakeholders meetings and in the media. A **steering group** composed of active members and guided by the EUTA **Chair** drives the Alliance's work forward by coordinating EUTA's input into policy discourse and engagement with policymakers from across Europe's political spectrum.

The Alliance is always looking for new members that can contribute to its work as a key reference point for EU policy-makers seeking feedback and input from European scaleups.

Right: some moments of the Annual General Meeting (AGM) of the Alliance (Brussels, May 7th 2019) with the current EUTA President (Gianpiero Lotito) and Chair (Magdalena Piech).



EUTA Presidency

Since its foundation, the European Tech Alliance has been guided by two Presidents. **Niklas Zennström**, CEO of Atomico and co-founder of Skype, was the first President of the EUTA and kept his role for 3 years. On December 2018, **Gianpiero Lotito**, Founder & CEO of FacilityLive, succeeded him as President of the Alliance.

**EUROPE'S
TECH VISION
FIVE YEARS
FROM NOW**

Europe has a vibrant tech ecosystem. As the European Tech Alliance (EUTA) we firmly believe in Europe's potential to be a global tech leader and want to play our part. We represent the digital innovators born and bred in Europe, including established champions, scaleups, and leading start-ups. Under the banner of the Alliance, we strive to:

- Give voice to European digital champions from across the region and provide policymakers with our collective experience of scaling tech companies in Europe.
- Provide a better understanding of the variety of digital business models that Europe has produced, from music services to next-generation search and information management, online advertising, mobile games, file sync and sharing, and platforms for dating, e-commerce, and mobility.
- Support the creation of a political and legislative landscape that can grow the European tech ecosystem, and thus works for citizens, businesses, consumers, employees, and investors.

While the new legislative mandate means a reassessment of the EU's political priorities and policy approaches, the EUTA encourages policymakers to maintain their commitment to seizing the opportunities provided by the digital economy and to construct a supportive regulatory framework. **While Europe has established itself as a first-mover in digital regulation, looking ahead the challenge is how to translate this into tangible growth for our economy.** Striking the right balance will help Europe to become globally competitive in more sectors, all underscored by our shared European values.

The Digital Single Market (DSM) must remain a political priority, as it can remove barriers, reduce fragmentation, and allow companies to scale-up and compete globally. Strong internal and external coordination is a prerequisite for the EU in delivering on these objectives. To complete the DSM, the EUTA would like to highlight its members' key recommendations:

1. INVOLVE THE WIDER TECH COMMUNITY IN POLICY CREATION – All legislative proposals must be proportionate, evidence-based, and tailored for incubating the EU's digital industry. We recommend that a proposal's impact on European growth be factored, to a much larger degree, into all impact assessments, public hearings also taking into account the differences between SME and startup growth models. Additionally, such companies should be proactively engaged earlier on in the legislative process, being mindful that the reality is many lack dedicated resource in the form of a Government Affairs team. Without their inclusion, legislation may be designed with only a handful of specific business models in mind and this will fail to adequately consider the needs of Europe's varied tech sector.

2. PROMOTE A TECH SECTOR THAT IS RESPONSIBLE AND ETHICAL – As European companies, we have scaled with an EU regulatory approach at our core. Our members believe in a sustainable, accountable and cooperative tech agenda. The European Commission should ensure that all companies comply with legislation, for example VAT or consumer rules. Such legislation should be effectively applied, regardless of whether or not the respective company has a physical presence for its operations in the EU market. By doing so, we believe that the EU can help to foster – and in some cases regain – consumers' trust in technology.

3. CREATE FINANCIAL AND INVESTMENT CONDITIONS THAT CAN SCALE THE NEXT GENERATION OF EU TECH CHAMPIONS – A variety of measures will be essential to boost the critical mass of investment needed in Europe to have a thriving tech sector that is able to compete on a global scale. This includes doubling down on investing in Europe’s digital future, for example through Europe’s university and R&D facilities, connections to the peripheral and neighbouring regions, and the adoption of EU tech by public administrations, which requires the creation of more innovation-friendly public procurement rules. In tandem with such public investment, we want to ensure suitable fiscal conditions for public and private investment in equity. This should include the fair taxation of profits and shares and an ambitious revision of additional remuneration, for example the greater development of employee share ownerships and pension rights portability, which can be a key way for emerging tech companies to hire and retain the best talent. Beyond immediate investments, we need to ensure appropriate IP protection and wider education so that the benefits of our collective investments are retained in the European ecosystem.

4. ACCOUNT FOR THE DIVERSITY OF DATA USES AND BUSINESS MODELS WHEN CREATING DATA LEGISLATION – Our members have world-class engineers and data scientists that work with data in a variety of ways to deliver and drive their innovative services, be this in automated testing, behavioral assessments, or service refinement. As many of us primarily operate within Europe, EU actions around data policy have a substantial impact on our operations. Following the adoption of the General Data Protection Regulation (GDPR), we believe the EU needs to pursue an effective and balanced EU data policy agenda. In the past, legislation has been drafted with a handful of business models in mind. We urge lawmakers to consider the wider data ecosystem when drafting and amending any new policies. We also urge future legislators to avoid heavy-handed regulation of data, as it can have a disproportionate impact on, and heavy cost to, EU tech companies for whom Europe is often the most important market.

5. CONTINUE TO EXAMINE THE CHANGING DYNAMICS OF TECHNOLOGY ON COMPETITION ISSUES – The EU’s competition policy has looked to underpin a fair and competitive European economy. While tech is a particularly fast-moving sector, we understand policymakers’ concerns about killer acquisitions, data concentration, barriers-to-entry, and vertical integration issues; which all have the potential to stifle innovation and harm consumers choice. In this debate for example, the importance of online platforms as a tool facilitating the interaction between businesses and consumers should be recognised. In most cases, this open environment has enabled growth, innovation and competition in the economy. Our members have experience in operating in a competitive landscape both as platforms and their users. We firmly believe that healthy competition must be on the merits of our services, not on the basis of rules set by a few operators. Anti-competitive actions can create an uneven playing field which can foreclose growth opportunities for European companies, hinder innovation, and limit consumer choice. We urge the EU authorities to provide an open and competitive environment in Europe, and to ensure that dominant global companies, from a variety of sectors, do not misuse their power.

6. ENSURE MUCH-NEEDED POLITICAL FOCUS AND FINANCIAL SUPPORT FOR ARTIFICIAL INTELLIGENCE (AI) – The EUTA agrees with the Commission’s vision for AI: making Europe a global leader while preserving the fundamental values of Europe. That is why we welcome the Commission’s ambition for a “human-centric” AI and the ethical guidelines for the development of trustworthy AI. Yet, over-regulation could stifle AI’s nascent development and unnecessarily restrict innovation and growth opportunities that will benefit citizens and consumers across Europe. AI is a horizontal technology: the diversity of its application will continue to quickly expand and be deployed in many different and unrelated sectors. At this stage, the political direction should prioritise the tools to attract much-needed investment and ensure the best researchers, developers, and engineers stay, and come to, Europe. Additionally, our collective priority should be securing a skilled European workforce through increased investment in Science, Technology, Engineering, Arts and Math (STEAM), soft skills, and encouraging effective training and cooperation between academia and business.

7. TAKE A TARGETED APPROACH IN REFINING THE E-COMMERCE DIRECTIVE – The e-Commerce Directive has enabled thousands of new online businesses to emerge and created opportunities for companies, consumers and Europe’s economy as a whole. We maintain our strong support for the e-Commerce Directive, in particular the country of origin principle and framework for intermediaries as these are pillars for the development of our sector. We understand that the Commission is considering whether a review of the Directive, including the role and responsibilities of platforms, is needed. The EU has already started examining specific areas such as copyright, the withdrawal of terrorist content, and fake news through a voluntary code of practice on online disinformation – to name just a few examples. Various types of illegal and harmful content raise different issues and require different answers. We support the approach taken by the European Commission until now, whereby targeted measures take into account the particularities of different types of content or areas of action, rather than adopting a “one-size-fits-all” approach. Such an approach would risk creating legal uncertainty or being excessively broad and ill-fitted for certain challenges.

8. MAKE TAXATION FAIR FOR ALL AT THE GLOBAL LEVEL – The EUTA supports the policy objectives of ensuring the fair taxation of all businesses, ensuring that resources are not diverted from the European ecosystem. However, we do not support diverging tax regimes for tech companies, which do not reflect the reality of a global economy that is rapidly digitising. Equally, we have grave concerns about efforts to tax companies’ revenues rather than profits. This would have an enormously adverse effect on the ability of European tech companies to scale up, particularly while they are not yet profitable. The EU, its Member States and the OECD should focus their efforts on agreeing on a workable, predictable and straightforward solution for international corporate tax in a digitalised economy, which ensures only companies’ profits are taxed, and those profits are only taxed once.

Global media coverage



**Gianpiero Lotito interviewed
by Bloomberg TV**
March 26th, 2019



**Gianpiero Lotito interviewed
by BBC World News TV**
December 31st, 2018



**Niklas Zennström interviewed
by Politico**
December 4th, 2018



**Daniel Ek interviewed
by Politico**
January 9th, 2018

POLITICO

BBC WORLD NEWS



Bloomberg
TELEVISION

la Repubblica

Business
Leader



CORCOM

TechCrunch

tech
eu

Il Messaggero

IL FOGLIO
quotidiano

BUSINESS
INSIDER



la mia finanza

The EUTA members

allegro



Bolt

Booking.com

BRAND24

Cdiscount



criteo

dreamstime

EMAG

facility live

FREE NOW



King

Klarna

learnWorlds

mestic group

Prowly

ROVIO

sentiance

SEZNAM.CZ



[SPOTAHOME]

Spotify

SUPERCHELL

TPS engage

tresorit

xarevision
technology for retail

zalando

Members headquarters

- Allegro** Poznań, PL
- Bla Bla Car** Paris, FR
- Bolt** Tallinn, EE
- Booking.com** Amsterdam, NL
- Brand24** PL
- Cdiscount** Bordeaux, FR
- Criteo** Paris, FR
- Code For All** Lisbon, PT
- Dreamstime** Bucharest, RO
- eMAG** Bucharest, RO
- FacilityLive** Pavia, IT
- FREE NOW** Hamburg, DE
- Ilion** Madrid, ES
- King** London, UK and Stockholm, SE
- Klarna** Stockholm, SE
- LearnWorlds** London, UK
- Meetic Group** Boulogne-Billancourt, FR
- Prowly** Warsaw, PL
- Rovio** Espoo, FI
- Sentiance** Antwerp, BE

- Seznam** Prague, CZ
- SoundCloud** Berlin, DE
- SpotAHome** London, UK
- Spotify** Stockholm, SE
- Supercell** Helsinki, FI
- TPS Engage** Bucharest, RO
- Tresorit** Zurich, CH and Budapest, HU
- Xarevision** Porto, PT
- Zalando** Berlin, DE



allegro

Allegro



Founded in 1999 and headquartered in Poznań (Poland).
Visit us on allegro.pl

OUR 5 PRIORITIES

Level playing field,
Digital growth,
Empower platforms &
users, Sustainability,
Responsible taxation

6th

EU's largest
online retailer

1M+

Products sold daily

21M

Registered accounts

140K

B2C merchant accounts

60%

Of all visits at Allegro
are mobile

1,800

Employees

Allegro is a real European-born tech leader and one of the most recognised brands in Poland. Nowadays it is the #1 online shopping destination in Poland and #6 eTail business in Europe.

Since 1999, we make shopping, a tedious everyday chore, a much more agreeable convenient experience. We save time, ensure comfort and convenience. We provide everyone in Poland – regardless of where she or he lives – online access to the broadest available selection of products in the best prices.

Allegro marketplace currently stands for: nearly 120 million B2C and C2C offers listed a month; 140,000 merchants accounts – not only the world's biggest brands but mostly small and medium Polish enterprises – selling on the platform; and 21 million registered accounts. We are happy about our results but we don't rest on our laurels. We want to bring even more Poles online. In the world of e-shopping, clients expect, above all: low prices, wide selection and maximum convenience. Utilizing mechanisms of deep learning, we focus on solutions that cater to those needs, i.a.: faster and better search, personalized shopping experience or development of mobile solutions. In Poland, only 9 out of 100 purchases are done online – in the UK it's 20 out of 100. This shows the direction in which we are headed and the preferences of consumers.

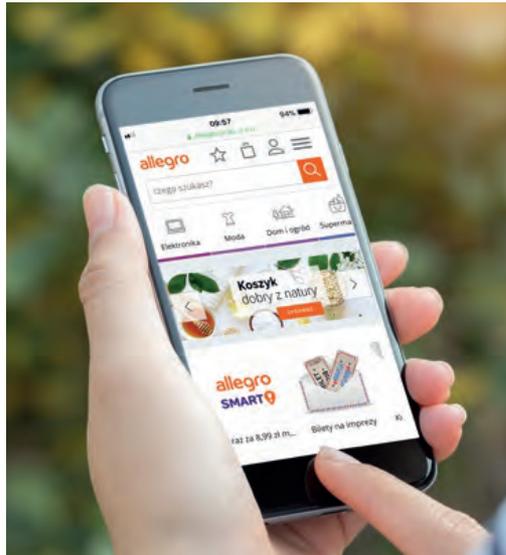
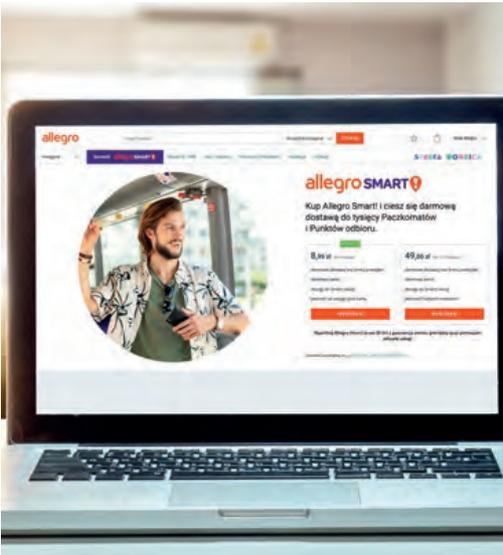
Allegro is responsible for hundreds of thousands of jobs in Poland, created both directly and indirectly, supporting the digital transformation of the Polish economy. We help Polish entrepreneurs start and expand their e-commerce businesses: no big initial investments are needed to take advantage of our unique marketplace ecosystem and reach millions of customers.

Allegro – From local startup to European tech champion

At the very start, the company created by just a few people were headquartered in the basement of a Poznan-based computer wholesaler and the first version of the website fitted on just one floppy disk. E-commerce in Poland was still in its infancy at that time, and Allegro was one of the businesses that contributed the most to its growth.

A turning point in our history was to get the first one million offers in 2001 and one million buyers in 2013. Since then, the company has undergone a huge transformation.

From an auction website for hobbyists, it has evolved into Poland's #1 online shopping destination. Today, we employ over 1,800 people in the biggest cities in Poland: Poznan, Warsaw, Torun, Krakow and Wroclaw. Nearly half of them are top-class IT experts.



In the past 20 years we have grown from a start-up operating from the basement of a computer hardware wholesaler with a team of 5 into one of the most recognisable Polish brands, with 5 branch offices across Poland and with over 1800 employees on board. Many of the start-up atmosphere survived in the company's culture to this day: consumer focus, openness in communication, lack of complicated procedures and agile approach to business development.

The Bolt logo is displayed in a large, bold, green font. The letter 'o' is stylized with a white dot in the center, resembling a drop or a wheel. The background of the logo area is a blurred image of a car's interior.The Bolt logo is displayed in a large, bold, white font. The letter 'o' is stylized with a white dot in the center, resembling a drop or a wheel. The background of the logo area is a blurred image of a car's interior.

Founded in 2013 and is headquartered in Tallinn, Estonia.
Visit us on bolt.eu

OUR 5 PRIORITIES

Ride-hailing regulation harmonized, Digital transport competition, AI, Mobility platforms growth, Environment

35

Countries where Bolt operates

100

Cities of operation

1300

Number of employees

25M

Number of passengers globally

1B\$

Company valuation

Bolt is the leading European on-demand transportation platform focusing on making urban travel easier, quicker and more reliable. Bolt is building the future of urban mobility and aims to bring reliable on-demand transport to the masses. We want to make people's lives better by saving them time and money, reducing stress and improving cities through decreased traffic, parking and pollution. We believe in affordable trips and happy drivers. Being smart about how we grow the company and focusing our operations on efficiency allows us to pass the savings on to passengers and drivers. This, in turn, enables us to create thousands of new earning opportunities for drivers and make ride services affordable to a lot more people, making personal cars a thing of the past.

Bolt started with founder Markus Villig's realisation of how outdated the taxi industry was. In addition to being expensive, getting a ride also took unreasonably long, either because of outdated technology or lack of tech altogether. Markus borrowed money from his parents that they had originally saved for his college tuition and built the first version of the software in 2013 when he was just 19 years old. He launched Bolt with 50 drivers whom he had personally recruited – and it was a hit. After a huge rush of downloads in the first weeks, he teamed up with his brother Martin, ex-Skype, and technical co-founder Oliver Leisalu to build the next version. Today, Bolt is one of the fastest-growing transportation platforms in Europe and Africa with over 25 million users in more than 35 countries. Bolt's investors include Daimler, Didi Chuxing, Korelya Capital and TransferWise co-founder Taavet Hinrikus.

Bolt's services include ride-hailing, with cars and motorbikes, as well as electric scooter sharing. In summer 2019, the company introduced its food delivery service, Bolt Food.

Building the future of urban transport

City transportation is currently poorly organised and inefficient. Most cities in the world have more than 8 parking spaces per each car in the city and cars are in use only 5% of the time. We believe this will change and people will be giving up on personal vehicles shifting towards ride-sharing and shared micro-mobility. A two-ton car is rarely the best way to move a single person around the city – there are several new opportunities that are more convenient for moving around cities, like scooters or motorbikes. In the future, Bolt will become an app that combines car sharing, scooters, motorbikes, and information on public transport routes to recommend the best ways to get to your destination. Bolt is building the future of urban mobility – an on-demand transportation network for every distance, price range or customer need, all right there at the touch of a button.



Markus Villig is CEO of Bolt. He launched the company at 19 years old while still in high school and was recently featured as the youngest CEO in Forbes Europe 30 under 30 list. He has received the presidential award for the Best Young Entrepreneur of Estonia. Martin Villig is the co-founder of Bolt and has previously held management positions at Skype, Fortumo and NASDAQ Tallinn Stock Exchange.

The Criteo logo features the word "criteo" in a lowercase, sans-serif font. A stylized orange line starts above the 'o', goes up, then right, then down, ending in a small square.The word "Criteo" is written in a large, white, sans-serif font. The background is a blurred image of several colorful paper flags (red, orange, yellow, blue) flying against a green, leafy background.

Founded in 2005 and headquartered in Paris (France).
Visit us on www.criteo.com

OUR 5 PRIORITIES

**Predict, Trust,
Transparency,
Secure, Protect**

19K+

**Retailer
and brand clients**

3.7K

Publishers

\$800B+

Annual commerce sales

2,800+

Employees worldwide

700

Engineers in R&D

600TB

Of data analyzed

Founded at a start-up incubator in Paris, Criteo has become a global leader in online advertising. Criteo enables companies of all sizes to grow their businesses through smarter marketing campaigns while providing Internet users with timely, personalised and AI-powered product recommendations.

Since day one, Criteo has recognised the need to balance relevant advertising experiences with privacy expectations while empowering Internet users to control their online experiences.

We are a proponent of consumer choice through transparency and control, and we lead on industry standards supporting these objectives. Privacy by Design has been Criteo's longstanding commitment since our first product offering in 2008, and we have always delivered the highest levels of security and data privacy across our portfolio of products and services. The EU data protection framework – the most stringent data protection regulation worldwide – is deeply embedded into our product development pipeline and this is why our approach to privacy greatly differs from the competition.

Today between 54-68% of EU online services are financed by advertising. Offering an ad-supported service is the most favoured business model for a majority of platforms or Internet websites that can be accessed for free by a wide community of users. By delivering powerful advertising campaigns that allow advertisers to reach customers on publishers' websites and apps, Criteo also acts as the revenue engine at the heart of the open Internet, enabling economic growth and vital advertising resources for online publishers and content sharing platforms.

With 32 offices and 2,7000 employees globally, Criteo is also an employer of choice, providing talents with high-skilled job opportunities.

Criteo's leadership in AI

Artificial Intelligence (AI) technology is at the heart of our business. Through the years, machine learning has greatly improved the relevance of our ads, resulting in better consumer experiences and more impactful growth for retailers and publishers alike. To pioneer innovation in computational advertising, we launched the Criteo AI Lab in Paris in 2018. Our AI Lab is backed by a dedicated €20 million investment fund and employs 100 top researchers and engineers. As a center of scientific excellence, our AI Lab delivers both fundamental and applied scientific leadership through best-in-class research in machine learning and deep learning, as well as groundbreaking technologies. We are working hard to increase investment levels and promote AI development in Europe, in close collaboration with academic institutions to train the next generation of tech leaders.



From New York to London, Paris to Tokyo, we have a network of over 30 offices across the world. We are a cultural melting pot of more than 90 different nationalities, united by our love of challenges. While we take our work seriously, we love to have fun and laugh along the way. Every office is filled with equal measures of hard work and play.

dreamstime

Dreamstime

Founded in 2004 and headquartered in Bucharest (Romania) and Brentwood (USA). Visit us on www.dreamstime.com

OUR 5 PRIORITIES

**Copyright protection,
Fair digital market,
Product and tech
innovation**

105

Million stock images

25

Million users

500K

Photographers

3.5

Million monthly images

No. 1

Stock photo community

The Dreamstime dream started in 2000 with a small supplier of photography for web design that has now grown into the largest stock photo community worldwide and has become one of the world leaders in the stock media licensing industry since 2004. Its impressive and varied library of stock Royalty Free content is uploaded by photographers and videographers from all over the world, shot on film or digital, in jpg, vector or tiff formats. The content is curated and covers all topics from editorial (celebrities, sports, events, fashion) to commercial (travel, fun and families, business and food) shots and footage. More recently, Dreamstime also added a large library of Royalty Free music and SFX.

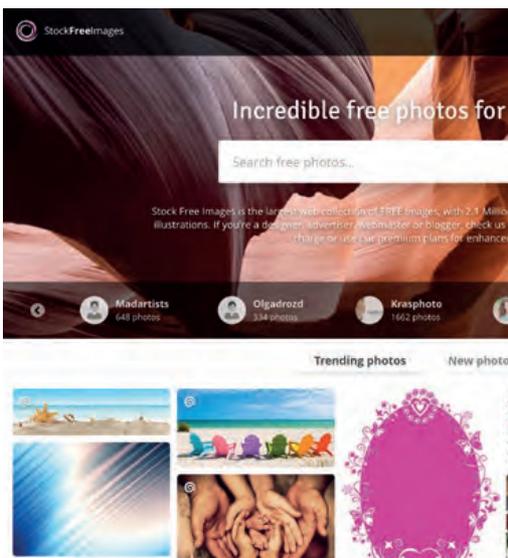
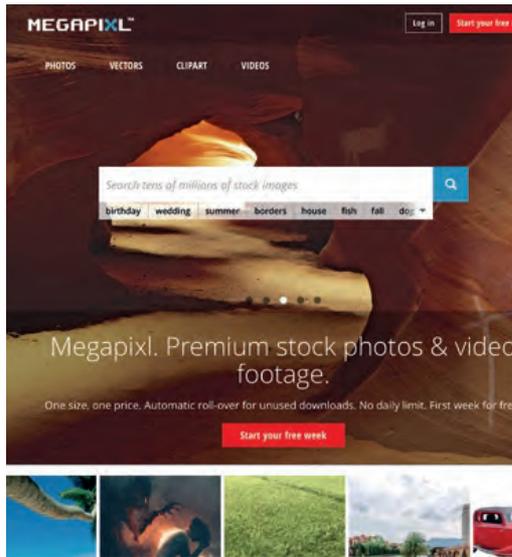
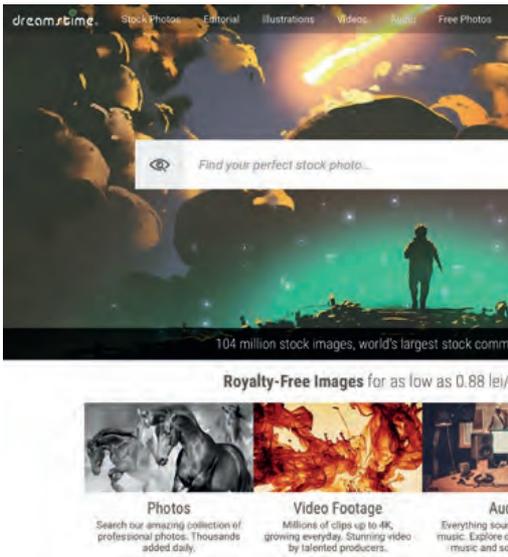
The agency has the largest customer base in stock photography (over 26 million users in 2019) and the largest stock industry audience with 11 million unique monthly visits in September 2019. It also hosts one of the largest collection of free Royalty Free and CC0 images, along with seasonal vetted collections and editors' top picks and adds around 3.5 million new files each month.

In 2012, Dreamstime took on new projects and in addition to dreamstime.com, launched two more sites, Stockfreeimages and Timelineimages. While the first was designed as the world's largest free image library to that date, the second was meant to answer the rising need for Facebook visual content and offered a wide selection of cool images to be used for Facebook Timeline covers. In 2016, Megapixel, Dreamstime's most ambitious project, was launched with a curated top choice selection of Royalty Free images and footage. And the dream continues...

Designers' top choice in stock photography

Dreamstime has been providing high quality media to clients in the creative market since 2004. One of the leaders in the Royalty Free media industry with 26 million registered members and over 112 million images, vectors, footage and audio files, Dreamstime's library is a first rate resource that compliments designers' work worldwide. With more than half a million international contributors, the agency is now the world's largest stock photo community and features the world's largest collection of free, safe-to-use images.

A copyright protection advocate and pioneer in the industry, Dreamstime is member of DMLA, the trade association for stock agencies in the United States and one of the first stock agencies to be received as member of CEPIC (Coordination of European Picture Agencies Press Stock Heritage).





eMAG



eMAG

Founded in 2001 and headquartered in Bucharest (Romania).
Visit us on www.emag.ro

OUR 5 PRIORITIES

Swift Advance of DSM,
Digital Skills, Smart EU
regulations, Support
for EU Digital Champions,
Boost Connectivity

+9.4

Million clients

+30,000

Sellers on Marketplace

+8.2

Million products

+4,500

Employees

every 1.2 seconds

eMAG sells a product

eMAG is one of the leading regional retail platforms with operations in Romania, Hungary, Bulgaria and Poland. For the past 18 years, the company developed a customer-focused culture by investing in technology-based solutions aimed at helping clients save time and money while constantly improving their online experience.

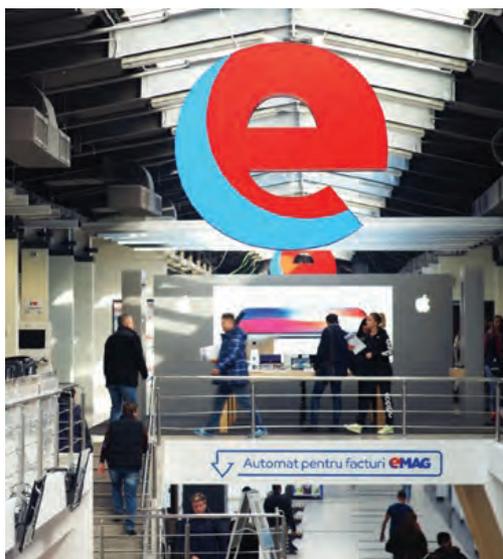
As an entrepreneurial company, eMAG wanted to share its experience and know-how to the local community of entrepreneurs in order to help them grow. Through its Marketplace, eMAG provides an added-value ecosystem that supports +30,000 entrepreneurs, from all the European communities it currently operates in, to scale their business and become digital entrepreneurs, with up to 1,000 new sellers joining the marketplace platform each month at regional level. eMAG assists them all into finding the best ways possible to gain access to new clients, grow revenue and develop a long-term business, while also offering the opportunity to expand internationally.

As one of the leaders in its field, eMAG aims to leave a distinct mark wherever it is present and contribute to society's evolution and growth. In 2012 it launched the eMAG Foundation, investing since then 1 million EUR per year in programmes which in 2018 alone improved the education of +5,400 students, guided by 422 teachers in 48 dedicated study centers.

As a European technology company, eMAG firmly believes in Europe's potential in the new digital economy and wants to play its part. With a continuously expanding product variety, eMAG is the place where anybody can order anything from anywhere, as every 1.2 seconds eMAG sells a product.

eMAG - CEE's online shopping destination

eMAG's rapid growth, underpinned by its constant efforts to evolve in line with the latest market trends, has propelled the company to the forefront of the regional ecommerce market. Its over 4500-strong employee network has built an extraordinary shopping experience for consumers in Romania, Hungary, Bulgaria and Poland. At eMAG we develop and use our technology (i.e. AI algorithms set to deliver better Search using ML, Recommendation Engine, Image-Product matching, Automated Translation System, Risk Engine and others) to drive innovation and facilitate the best online shopping experience to the benefit of the customer. eMAG's goal is to deliver the most friendly and helpful shopping experience by offering a wide range of products, services that are constantly updated based on clients' needs and user-friendly journey on its platforms (site and app).



We are keeping the bar high by working hard to improve our customers' experience continuously. This is why innovation plays a central role at eMAG: our teams are constantly developing solutions meant to offer the most user-friendly and useful e-commerce solutions. Our technology is enabling clients in 4 EU member states to save time and money, while also supporting the growth of the communities in which we operate.

The logo for FacilityLive, featuring the word "facility" in a red, cursive script and "live" in a smaller, red, sans-serif font to its right.A colorful, abstract banner with various shapes and colors, including red, blue, yellow, and green. The word "FacilityLive" is written in large, white, sans-serif letters across the top of the banner.

FacilityLive

Founded in 2010 and headquartered in Pavia (Italy).
Visit us on www.facilitylive.com

OUR 5 PRIORITIES

**Adoption,
Public procurement,
IP protection, Welfare,
Sustainability**

€60M

Fundraising

€225M

Company valuation

100

Employees

46

**Countries with
granted patents**

101

Shareholders

3

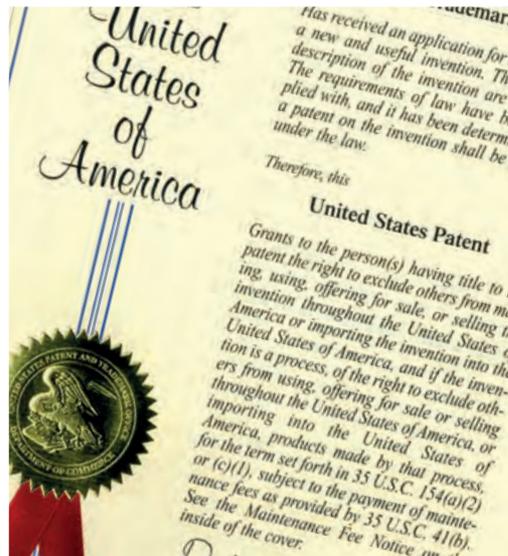
Countries of operation

FacilityLive is one of the most known European scaleups and the global media define it as the “European Search Platform”. Founded in 2010 by Mariuccia Teroni and Gianpiero Lotito – Italian innovative entrepreneurs with an extensive career on pioneering digital projects applied to content for the publishing world – it is headquartered in Pavia and has offices in Brussels and London.

FacilityLive is the 1st tech startup for company valuation in Italy (€225M) and the 10th in Europe according to the Map of Europe’s most valuable startups published by VentureBeat and PitchBook (2017). It is the first non-UK company to have been admitted to the London Stock Exchange’s ELITE Programme, board member of the European Internet Forum (EIF) and founding member of the European Tech Alliance of which Gianpiero Lotito is the current President. FacilityLive is a founding partner, in collaboration with the European Commission’s Startup Europe initiative, of SEMED (Startup Europe MEDiterranean), a digital platform that will connect all the innovative ecosystems of the Mediterranean. The Founders strongly believe in creating a digital ecosystem in Europe to foster the growth of a new European Tech Industry. For this reason and for the wish to “give back” to the community, in 2013 they decided to give up moving to the Silicon Valley and to build a global software company from an historical Italian city, Pavia. Blue chips like Accenture and Vodafone, important European companies such as Arriva (of the Deutsche Bahn group), research centres like STFC in the UK, and important events like G7 tested and used the technology for important applications. The participation in international events and the attention of the global media (such as BBC World News, CNN, CNBC, SKY News, Bloomberg TV) made it a “trailblazer” for the Italian and European startups.

A human centric technology

FacilityLive develops a next generation software platform with patents in 46 countries of the world for the management, organisation and search of information: a real paradigm change in the man-machine relation. The main goal of the platform is to make people's lives easier thanks to a technology able to use the human way to access information on the Web (on a company private system, on a personal computer or on a mobile). The main differences between FacilityLive and the traditional search engines are precision, speed to access complex information and an innovative, simple and efficient user experience. The single view organized in widgets allows the display of all the information context about the search. "In the future we will have different technologies that will give us the possibility to control the access to information instead of being pushed or addressed by an algorithm. We will have machines with Natural Intelligence" said Gianpiero Lotito (BBC World News, September 15th 2017).



From top to bottom, from left to right: a group picture with all the FacilityLive people: the FLievers; FacilityLive's Founders, Mariuccia Teroni and Gianpiero Lotito, who are respectively Chair and CEO of the company; the cover of the USA patent that FacilityLive obtained in 2012 by using Google as prior art.

Founded in 2009 and headquartered in Hamburg (Germany).
 Visit us on www.your-now.com/our-solutions/free-now

OUR 5 PRIORITIES

Transport & Mobility,
 Digital Single Market,
 Sustainability,
 Competition,
 Consumer Protection

150M

Annual tours (2018)

1,600

Number of employees
 (total)

35

Number of offices

650K

Number of
 driver partners

30M+

Number of
 passengers

18

Active Markets

The ride-hailing industry first went big in 2009, when mytaxi shook up the market. Ever since, innovation has been the name of the game. Since 2009 mytaxi has not only changed its name to FREE NOW but also added new, innovative services.

The FREE NOW group offers a range of ride hailing services, including taxis, private hire vehicles and state-of-the art e-scooters. Next to the FREE NOW service (formerly mytaxi), the FREE NOW group consists of the ride-hailing services Beat, Kaptén and Clever. While FREE NOW is present in 9 European markets (Germany, Austria, UK, Ireland, Poland, Italy, Spain, Portugal, Sweden), Beat has services in 4 Latin American and 1 European market (Peru, Chile, Colombia, Mexico, Greece), Kaptén operates in 4 European markets (France, Portugal, Switzerland, UK), and Clever is present in 1 European market (Romania). Additionally, FREE NOW's micro-mobility service Hive operates e-scooters in Lisbon and was recently launched in Paris, Athens, Warsaw and Vienna.

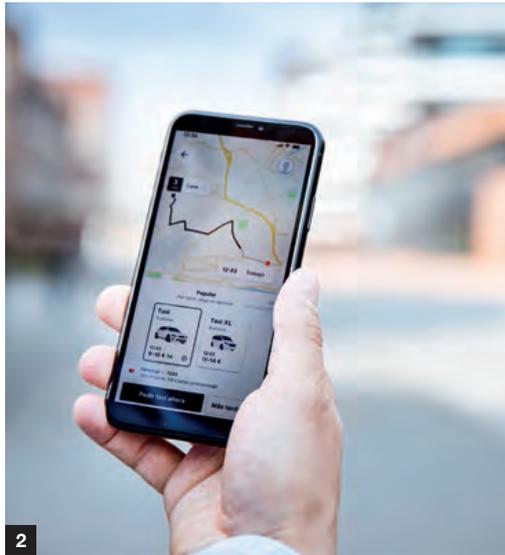
Together, the ride hailing joint venture from Daimler and BMW has gained a majority stronghold in the region for ride hailing services. Summed up, those services currently attract more than 30 million users and 650,000 drivers in 18 markets and 130 cities. This makes the FREE NOW group the biggest ride hailing provider in Europe and the fastest-growing in Latin America. In total, more than 1,600 employees in around 35 offices work for the services of the FREE NOW group, which is led by CEO Marc Berg. FREE NOW has the strategic advantage of being part of YOUR NOW's combined mobility ecosystem offering greater overall value to users.

Making mobility available for everyone

People shouldn't have to wave desperately from curbs or second-guess their drivers. FREE NOW believes that passengers and drivers share an important experience based on trust and security during each trip and wants to make it a pleasure doing business for both sides. In 2017, FREE NOW launched a ride-sharing service based on using licensed taxis called Match which consists of sharing the ride and cost between two unknown passengers. As FREE NOW strives for making mobility affordable and available for everyone, passengers have a wide choice of mobility options such as electric only or premium class cars as well as choosing private hire vehicle service Ride. By making payments cashless and shared routes trackable in real-time, it is made sure that everyone can grab a ride whenever, wherever – and with whomever they want. That's personal freedom, right now.



1



2



3



4

- 1) FREE NOW has recently launched a private-hire option which is complementary to taxis in several cities in Germany.
- 2) FREE NOW offers a variety of mobility options complementary to taxis from sharing a ride (Match) to electric and premium cars.
- 3) FREE NOW enables passengers to leave a tip to the driver as well as rating the driver for optimizing the experience of a ride.
- 4) With more than 100,000 driver partners FREE NOW serves to 14 million passengers

Founded in 2001 and headquartered in Paris (France).
Visit us on www.meetic-group.com/en/

OUR 5 PRIORITIES

Innovation, User experience, Best prices, Users' privacy & safety, Fair tech ecosystem

8M

Meetic couples

1/5

Knows a Meetic couple

15M

Conversations/year

15

Countries

8

Languages

300

Employees

Created in 2001, Meetic Group pioneered online dating in Europe and is now a leading provider of services for singles across Europe with products available in 15 countries and 8 languages.

We manage a portfolio of trusted brands including Meetic (in France, Italy, Spain, Portugal, Belgium and Switzerland), Match (in the UK, Ireland, Sweden, Norway, Denmark, and Finland), Lovescout24 (in Germany, Switzerland and Austria) and Lexa (in the Netherlands). Each of our brands is designed to increase our users' likelihood of finding a romantic connection.

Part of the global Match Group since 2011, Meetic Group is proud of its significant EU footprint. Its workforce comprises 300 employees, including more than 110 working at the tech department, across main office in Paris.

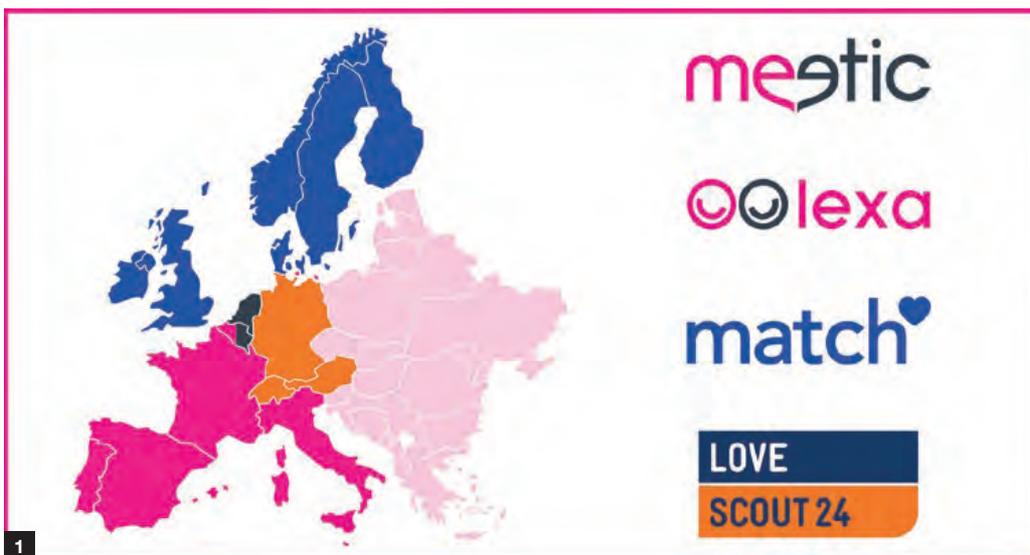
In order to fulfil its mission to spark meaningful connections for all of Europe's single people, Meetic Group remains at the forefront of innovation, to help people meet in real life, including:

- Events: Since 2012, after-work parties, cooking classes, trips... Meetic does everything to bring together like-minded people in a fun and relaxed environment so they can get to know each other and, hopefully, start something real.
- Lara, the virtual dating coach: Launched in 2017, Lara is the very first dating coach with conversational intelligence, recommending everyday new profiles and ideas places to date, help singles to complete and improve their profiles, and reply to users' questions about dating rules, behaviours and expectations.
- Online dating services for the over 50s. Ourtime in Sweden, Spain, the UK and Netherlands, DisonsDemain in France and Zweisam in Germany.

Technology to support meaningful connections

For 18 years, Meetic has been fighting to promote meaningful connections that every committed single deserves to have. In order to fulfil that mission, Meetic Group technologies are accessible on multiple devices. Technology to help meet the right person: thanks to our constantly evolving declarative, behaviour-based algorithm, Meetic can recommend the right profiles to the right single. Technology to coach singles during their dating journey: Lara, our virtual dating coach both with conversational intelligence, offers the best support to singles throughout their dating journey. Technology to protect and offer a peaceful dating journey: Meetic's award-winning Customer Care and Security teams investing a lot of energy to guarantee the best experience for singles.

When singles need more ways to meet each other, come to our IRL events: 400K singles have attended since 2012! 8M couples met on Meetic!



1) Meetic Group operates services for singles across Europe available in 15 countries and 8 languages.
 2) 110 of 300 employees are working at Tech. 3) IRL events: 400K singles attendees since 2012.



Spotify



Launched in 2008 and headquartered in Stockholm (Sweden).
Visit us on www.spotify.com

OUR 5 PRIORITIES

Platform Fairness,
Entrepreneurship,
Conducive Digital Market,
Fair Taxation, Responsible
Data Leadership

108M

Subscribers

232M

Monthly active users

50M+

Tracks

3B+

Playlists

79

Markets in which
Spotify is available

€13B+

Paid to rightsholders

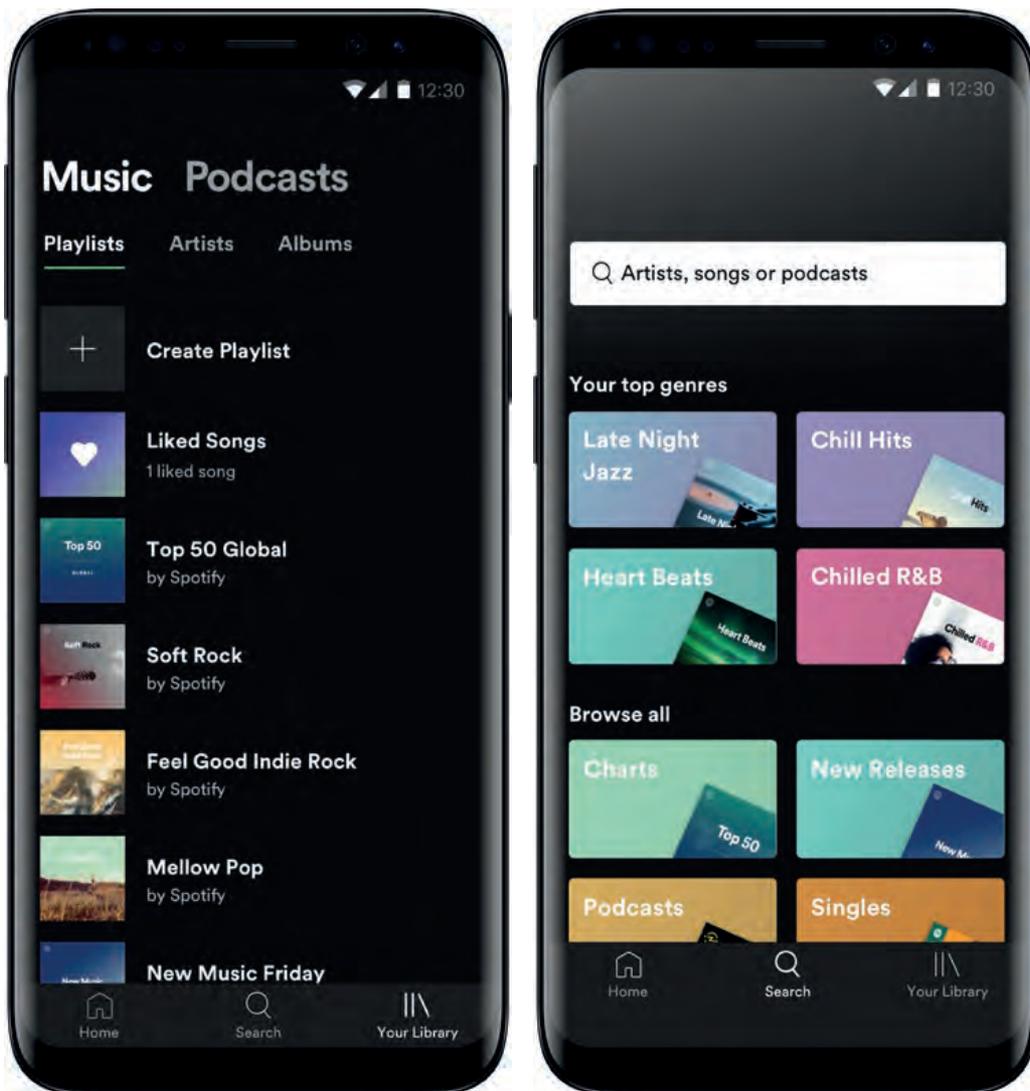
Spotify, leader in audio streaming. Europe is home to thousands upon thousands of creative and innovative digital entrepreneurs and huge talent. It has produced leading businesses in online retail, financial services, travel, media, and gaming sectors that are at the forefront of the digital transformation of economies and societies. Spotify is a case in point. Spotify was launched in Sweden in 2008. In just 11 years it has transformed music listening by creating a streaming revolution. It started with a simple idea: how to use new technologies – in our case streaming – to offer music fans access to any song any time, and at the same time fairly compensate artists and songwriters for their creative genius.

Spotify is based on a “freemium” model. You can either enjoy Spotify for free or subscribe to premium and enjoy further features and services. Today, Spotify is the most popular global audio streaming subscription service. And we keep moving! Besides music, you can now also find a great number of very diverse podcasts at Spotify that complete the personalized audio experience.

Spotify’s mission is to unlock the potential of human creativity – by giving a million creative artists the opportunity to live off their art and billions of fans the opportunity to enjoy and be inspired by it. We also strive to create an environment where a diverse community of innovative and passionate people can work together and be their very best. We implement company-wide policies that promote equality, inclusion and diversity among our more than 4,000 employees, such as progressive parental leave and Flexible Public Holidays.

The Spotify values

INNOVATIVE. We're original and creative in our thinking. To us, innovation is a default mind-set - a hard wired desire to improve things. **COLLABORATIVE.** We're stronger together. The better we collaborate, the more effective we are. When we're working well across functions, we're unstoppable. **SINCERE.** The best relationships are based on mutual trust and respect. We want to be fair and transparent in everything we do. We don't micro-manage, we trust each other to do a great job. **PASSIONATE.** We're proud of what we've achieved, and passionate about where we're going. We like being bold. We're not afraid of taking big bets, or getting them wrong. We all share a passion to learn and grow. **PLAYFUL.** Let's be honest, we have bands playing in the office - it kind of sets the tone. We're a playful company and a playful brand. We always have been. We never take ourselves too seriously.





TPS Engage

Founded in 2018 and headquartered in Bucharest (Romania).
Visit us on www.tpsengage.com

OUR 5 PRIORITIES

Digital Signage,
Connectivity, Dynamic
offering, Accessibility,
Transparency, Cross
Border Integration

6

Countries

+60K

Screens

+20M

Content plays

+15M

Contextual triggers

TPS Engage is a contextual marketplace for digital outdoor and indoor screens, a single point of buying for cross-border and cross-network DOOH ads. The solution offers small and large advertisers the possibility to serve the perfect ad at the perfect moment on any digital outdoor and indoor screen, transforming the way we look at outdoor advertising – from a static view to a dynamic one. TPS Engage was funded with the belief that the potential for Digital Outdoor advertising will be the next greatest marketing revolution of the 21st century. To deliver this vision, TPS Engage provides seamless self-service access to the largest Digital Outdoor and Indoor inventory in CEE, provides networks with vision technology to accurately track and reports relevant impressions and has the capability to ensure delivery of the perfect ad at the perfect moment. TPS has worked with brands such as Samsung, P&G, Coca Cola, Deutsche Telekom, Foodpanda, Uber Eats to improve their Out of Home efforts and connect consumer data with relevant brand messages as well as with countless SMBs that have never had access to OOH advertising before.

In 2018, Samsung and TPS Engage premiered the first contextual Samsung Experience Store – delivering dynamic in-store content based on the demographical data of the people inside the store.

In 2019, TPS Engage became the contextual DOOH partner for P&G and executed a multi-brand pilot project serving multiple creatives in a variety of contexts.

By combining its contextualization tool with its self-service platform for small & medium businesses, TPS Engage also works with companies that have never used outdoor advertising in their marketing strategy, thus opening the channel for a new type of advertiser.

Delivering the perfect ad at the perfect moment

TPS Engage works to make sure digital outdoor ads are relevant to the people in front of the screens. This helps networks deliver more performance to their clients, ad agencies make the most out of their creative messages and advertisers are able to improve sales and business results by ensuring their messages are relevant to the audience that sees them. We make this possible by connecting to any screen on the world through APIs and working with 1st, 2nd and 3rd party data while providing contextual possibilities. TPS Engage has worked with companies such as Samsung, Procter & Gamble, Coca-Cola, Foodpanda, Heineken, Uber Eats and many more to improve the efficiency and relevancy of their digital outdoor campaigns. TPS Engage is present in Dubai, KSA, USA, Serbia, Romania and Seoul and is connected with over 60.000 digital outdoor and indoor screens.



Bogdan Savonea is the CEO and co-founder of TPS Engage. With extensive experience in managing international stakeholders from his former position in the Romanian government, Bogdan's main focus today is ensuring that TPS Engage's mission of ensuring a more transparent, efficient and open digital outdoor industry benefits all the key players on the supply and demand chain.



Tresorit

Founded in 2011, headquartered in Zurich (Switzerland), with R&D center in Budapest (Hungary). Visit us on www.tresorit.com

OUR 5 PRIORITIES

**Data protection,
Online privacy, Cloud
security, Encryption,
Electronic signature**

25K+

Customers globally

100+

**Top talent engineers &
marketers in our offices**

3

**Patents on encryption
key management**

1.5+

**Million lines of code
in our apps**

193

**Countries where people
sync files with us**

15.85M

Euro investment

Tresorit is a Swiss cloud encryption company offering an end-to-end encrypted file sync and sharing solution which safeguards confidential information by design. Tresorit's built-in, zero knowledge encryption technology protects user files from data breaches and any form of unauthorized access, while enabling organizations to work and collaborate safely in the cloud. Since December 2018, Tresorit also provides a free, standalone, end-to-end encrypted file sharing service, Tresorit Send, to offer a secure alternative to unreliable file transfer sites and email attachments.

Tresorit's story started when its CEO, Istvan Lam, received his first cryptography book at the age of 12 as a gift from his family. It sparked a passion for cybersecurity and led him to research cryptography further, joining the global movement for digital privacy in his late teens. Ten years later in 2011, he founded Tresorit with two other university students and the head of a leading IT security institution. As security engineers, they knew that their data was not safe with mainstream cloud providers and decided to create a service with security at its heart.

Since then, Tresorit has grown into a company bringing secure collaboration to more than 25,000 customers globally, including leading enterprises both in Europe and North America. The company now employs more than 100 people in its offices in Switzerland and Hungary.

The successful completion of its €11.5M Series B financing in September 2018 was a significant milestone in Tresorit's history which has propelled the company towards further expansion on a global scale.

Uncompromising data security in the cloud

Due to its revolutionary encryption technology, Tresorit provides a cloud solution which matches the security of an on-premise file server combined with consumer-grade simplicity. Tresorit encrypts every file on the user's device before they are uploaded to the cloud with unique, randomly generated encryption keys. The files are never sent to Tresorit's servers in unencrypted format which guarantees that they can only be accessed by the user or the intended recipient. Through its various security and control features, and with data centers located in the EU, Tresorit helps businesses meet the requirements of the GDPR. Demonstrating its commitment to privacy and security, Tresorit received the prestigious Trusted Cloud Label 2.0 from the German Federal Ministry for Economic Affairs and Energy as one of the first file sync and sharing providers based on its compliance with a set of rigorous security and data privacy regulations.



Tresorit was founded in 2011 by Istvan Lam, Szilveszter Szebeni, and Gyorgy Szilagyi. The company officially launched its end-to-end encrypted file sync and sharing service after emerging from its stealth beta in April 2014. Today, Tresorit is an award-winning, market leading solution which serves 10,000+ businesses, enabling them to work safely in the cloud.

Founded in 2006 and headquartered in Porto (Portugal).
Visit us on www.xarevision.pt and www.shelf.ai

OUR 5 PRIORITIES

**Innovating retail,
Improving society,
Creating added value,
Having fun working,
Leading change**

13 years

Experience in retail

40%

**Country's population
reached**

€1.5M

**Public and private
funding awarded**

1

**H2020 SME
Instrument award**

50%

Annual budget on R&D

20

Proud team members

Xarevision is an innovation engine when it comes to technology for retail, having multiple time-proven solutions deployed, both online and in-store, with the largest retailers. We aim to continuously evolve everyday's grocery shopping, creating a frictionless and tailored experience.

Back in 2007, Xarevision started to implement what is now the biggest in-store digital network and queue management system running in Portugal, currently reaching over 40% of the national population. Ever since, Xarevision has been engaged in many different projects, including digital-signage, in-store interaction, cross and up-selling, big data and analytics, shopping digitalization and almost anything that strengthens the shopper-retailer relationship. More recently, Xarevision has successfully launched the first worldwide fully-voice-powered shopping list and grocery ordering application, allowing control via Google Home and/or Amazon Alexa, voice assistants and via its custom mobile app.

To further develop this market, it has recently created a subsidiary, Shelf.AI, both in Europe and in the United States, which offers a 360-degree B2B2C conversational platform for grocery retailers. Using cutting-edge technological tools of artificial intelligence and machine learning, it provides shoppers with a seamless omni-channel experience.

Xarevision is always looking ahead and is now developing novel hyper-personalized product recommendation systems, shifting the shopping paradigm towards an agent-based shopping model, where every shopper's interactions are unique and personalized. The company is keen in making the difference, by creating tools to positively impact people's daily lives, leveraging free time for the things that really matter.

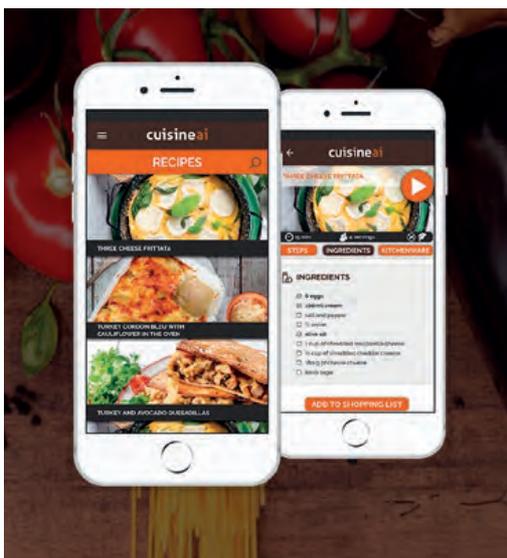
Our DNA

Xarevision's team is always looking for the next exciting disruptive technology project that will challenge today's retail conceptions. This keeps the company several steps ahead of the competition and helps our clients take the lead in their businesses.

At the same time, we are consistently attracting younger eager minds, looking forward to making the difference, not only in business but also on society. Xarevision has established protocols with several Universities, to bridge Industry and Science, ensuring also talent capturing at an early stage of the academic training.

From engineering to product design, sales to support, the whole organization is driven by the achievement of success. Throughout the years Xarevision has developed several award-winning solutions.

This frame of mind keeps us motivated. Steady and still, this is our strategy.



Xarevision is a leading company in technologies for retail. It has been engaged in innovative projects since day one, including digital signage, in-store interaction, cross and up-selling, big data and analytics, shopping digitalization, recommendation systems and solutions powered by voice and artificial intelligence, evolving everyday's grocery shopping experience.



Zalando

Founded in 2008 and headquartered in Berlin (Germany).
Visit us on corporate.zalando.com/en

OUR 5 PRIORITIES

**E-commerce,
Competition, Data,
Sustainability, Digital tax**

€5.4B

Revenue

28M

Active customers

14,000

Employees in total

2,000

Employees in Tech

5

Tech Hubs in Europe

1

AI Research Lab

Zalando is Europe's leading online platform for fashion and lifestyle. Founded in Berlin in 2008, we bring head-to-toe fashion to more than 28 million active customers in 17 European markets, offering clothing, footwear, accessories, and beauty products. The assortment of international brands ranges from world famous names to local labels. Our platform is a one-stop fashion destination for inspiration, innovation and interaction. As Europe's most fashionable tech company, we work hard to find digital solutions for every aspect of the fashion journey: for our customers, partners and every valuable player in the Zalando story. Our goal is to become the starting point for fashion.

We are a deeply European company and committed to the EU-project. Without the European Single Market, Zalando would not be one of the fastest growing tech companies in Europe. We are especially proud that all our tech hubs are located in Europe (Dublin, Berlin, Helsinki, Dortmund and Hamburg), including our AI research lab, and that more than 2,000 of our employees are techies. It is of strategic importance for us to keep this technological expertise in-house and thereby in Europe.

Zalando thinks European and across borders. For example, one of our newest fulfillment centers in Lahr, Germany, is managed bilingually in German and French. Located close to the French border, more than 30% of the employees are French, about 40% are German and around 30% have different national backgrounds.

In general, people with more than 130 different nationalities are working for Zalando representing 46% of all employees.

“United in diversity” is therefore also a good motto for Zalando.

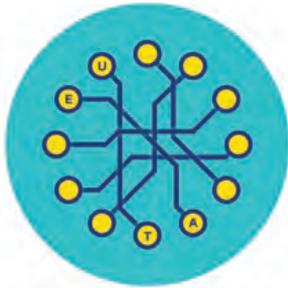
Grow together: Zalando's Partner Program

Platforms represent both the future of the digital world and the present. Through the Partner Program, we offer brands the opportunity to connect directly to millions of customers, who in turn benefit from increased assortment choice and the ability to shop multi-brand through a single destination with maximum convenience. We see in our data that the average customer buys around 13 different brands per year and almost every second order is a multi-brand order. The Partner Program is key in providing the assortment, availability and convenience the customer of today demands. Equally, it aims to empower brands to be more in control, from merchandising to pricing. Therefore, we do protect our partners' brand equity and we don't engage in price competition with our partners or interfere with their pricing.



1) Zalando Management Board – David Schröder, Jim Freeman, Rubin Ritter, Robert Gentz, David Schneider.

2) Tech Hub Dublin – At our Fashion Insights Centre we connect data science and engineering to find and scale the technologies of tomorrow, pushing the boundaries of Zalando as a fashion knowledge platform.



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