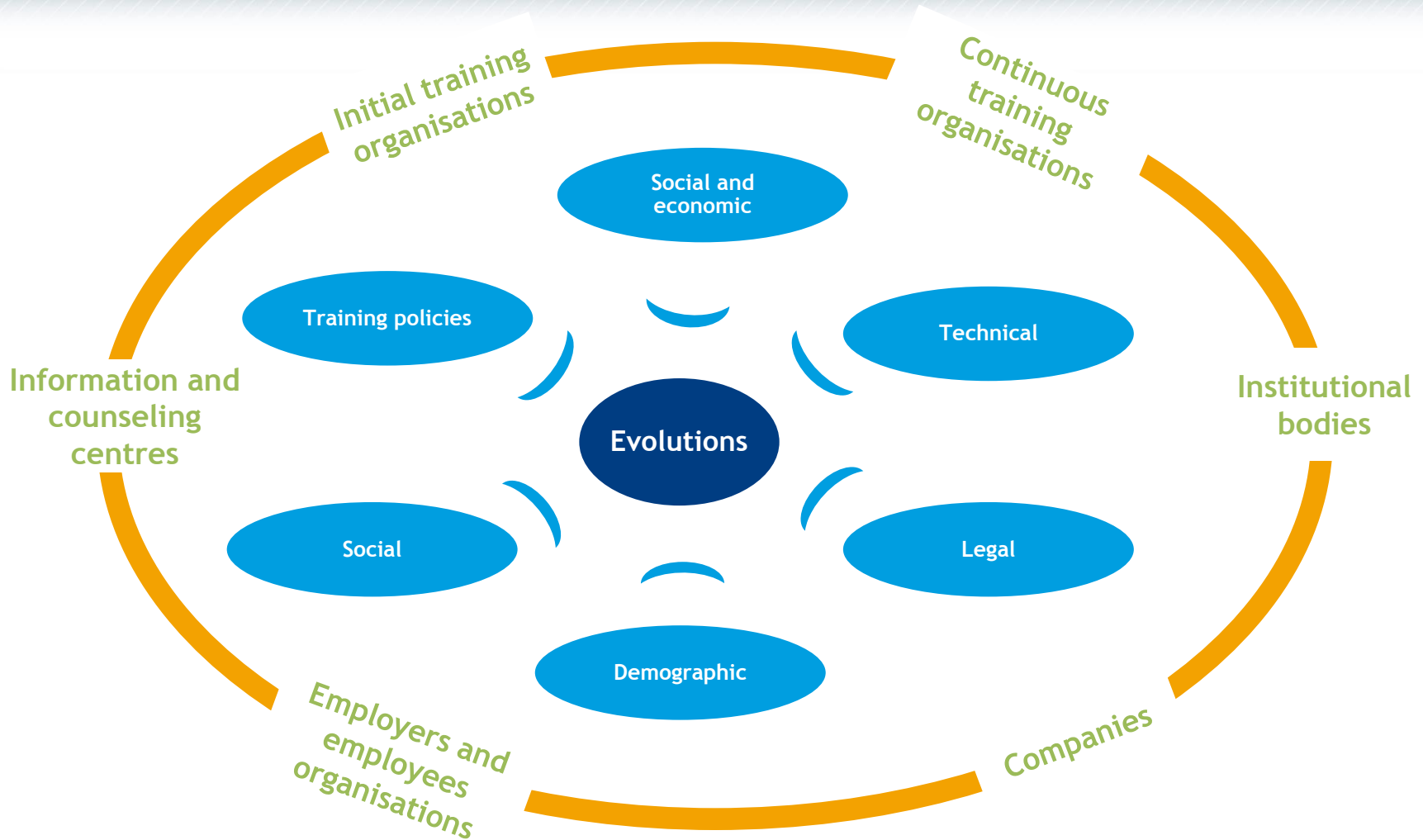


(Evolutions in the Automobile Services Branch

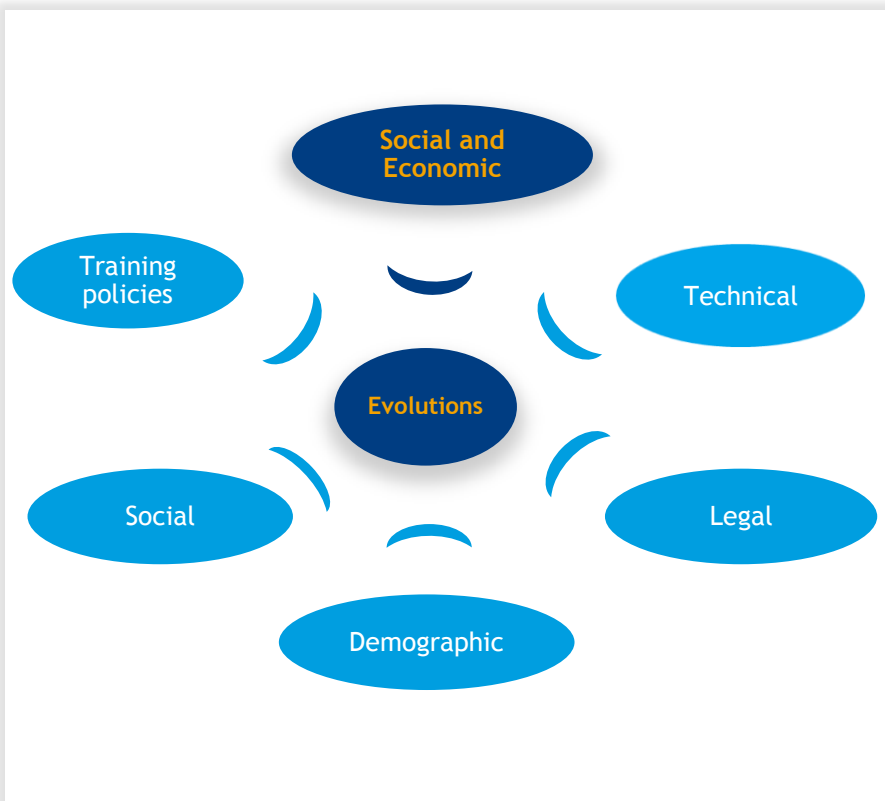


) Prospective points

Evolutions in the Motor Trade and Repair Branch

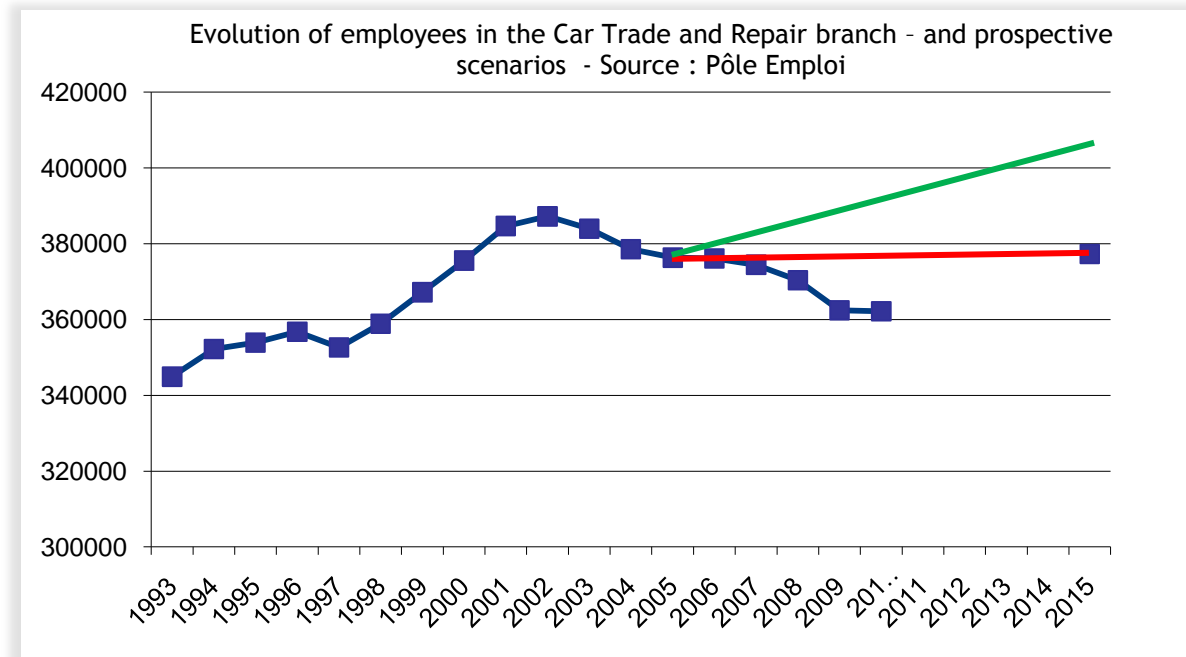


) Impoverishment of the car market



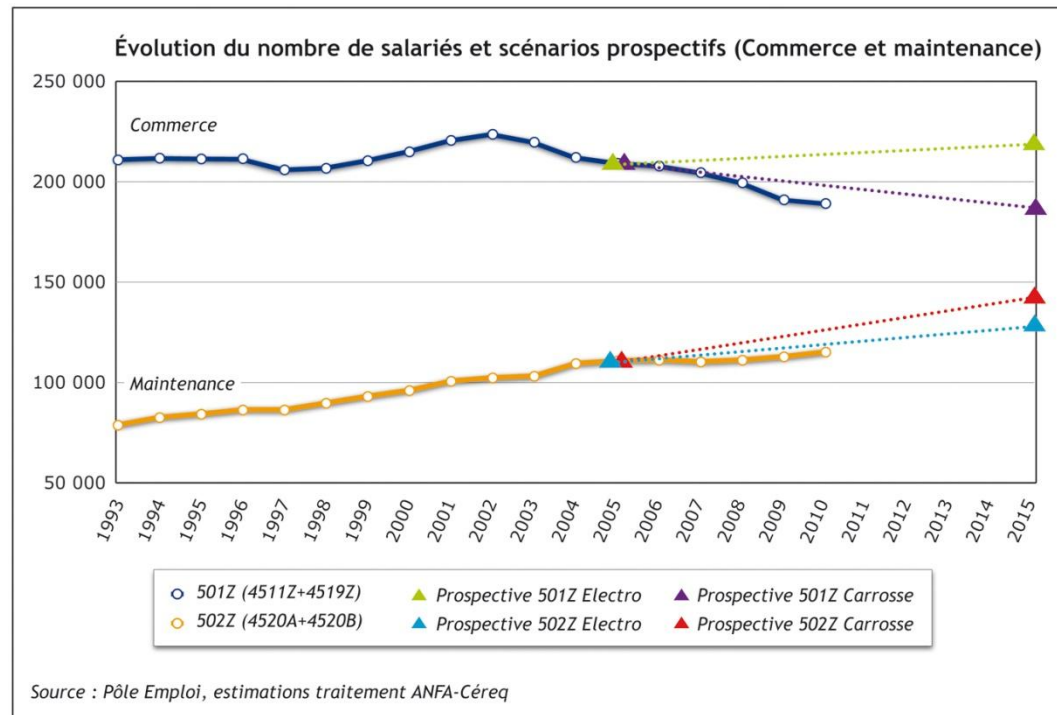
- The number of employees continue to grow in the repair companies
- Employment is decreasing in car dealers'
- Development of self-employment
- After-sale service is decreasing in the car manufacturing network (Peugeot, Renault...)
- Saturation of the new and recent used car markets
- Decreasing trend in body work repair
- Increasing average age of the vehicles in spite of the financial support of the French government
- Car market is less and less transparent
 - Older than 15 years' are not counted
 - Growing second -hand car market of private owners
 - Growing number of car repairs outside the traditional garage

) Prospective study showing two scenarios of employment evolution



)) In 2009, employment decreased particularly in car sales services (car, motobike and petrol sales)

) A decrease of 8500 employees in the trade and repair sector between 2008 and 2009

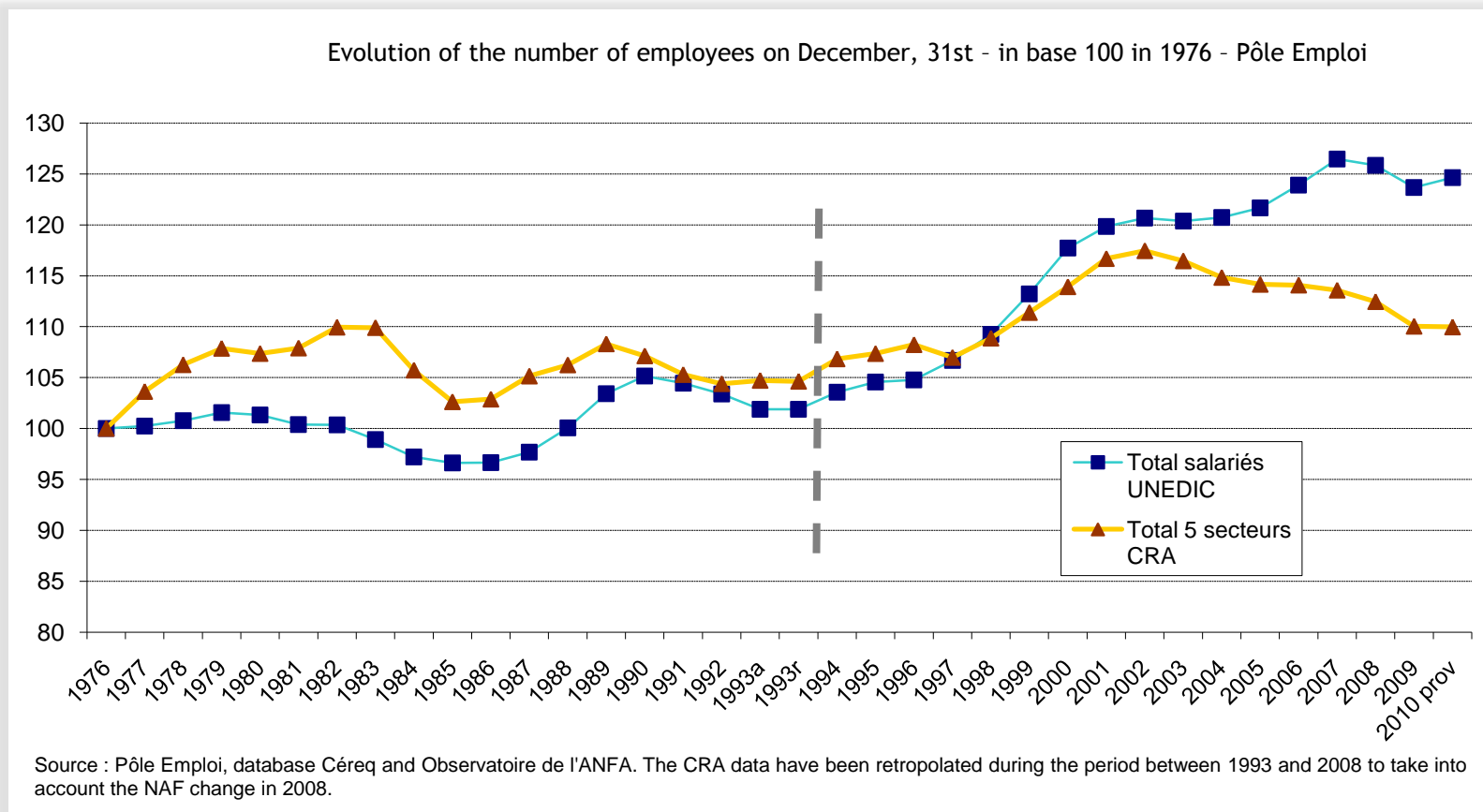


)) Employment decrease in the car sales sector in 2009

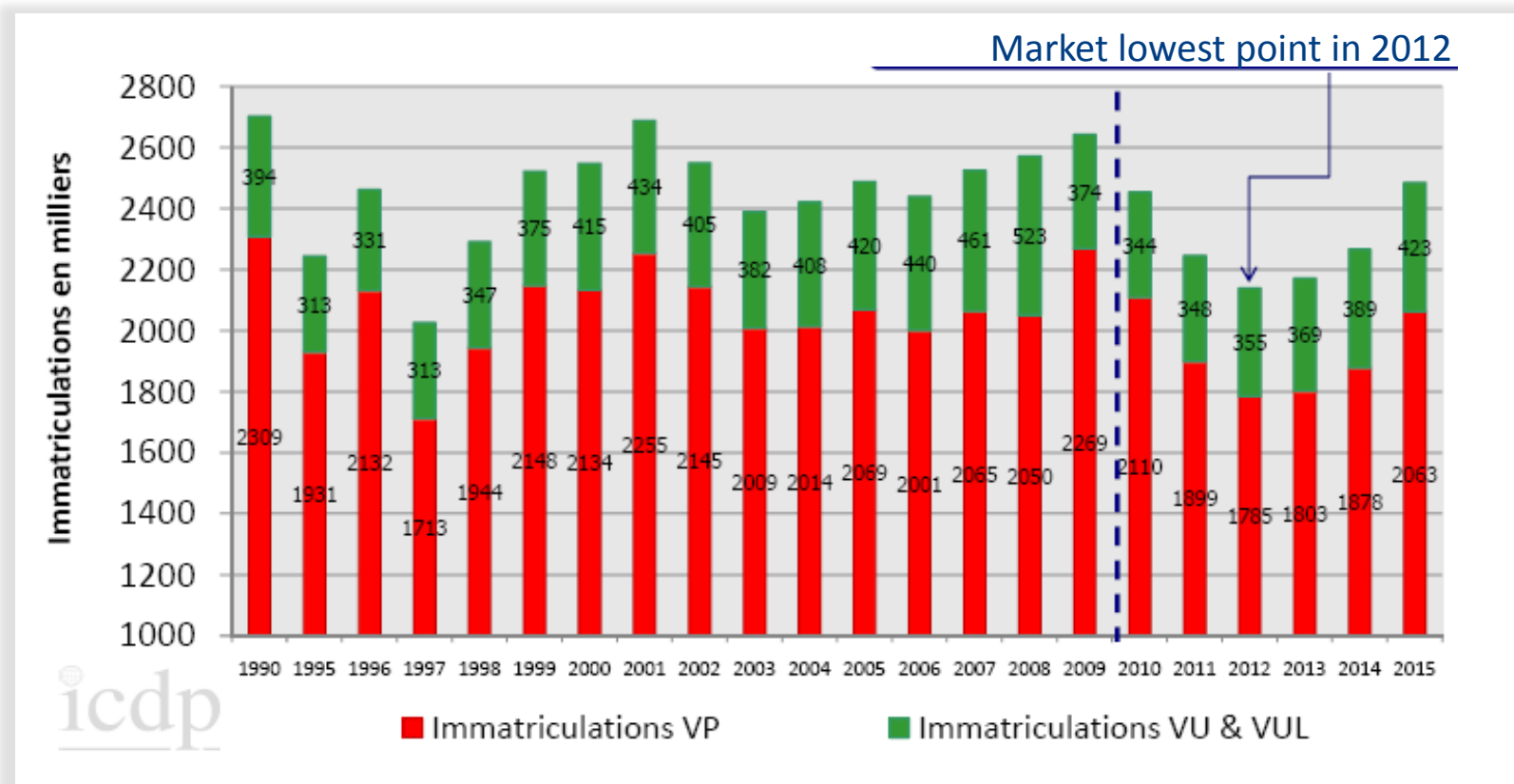
The biggest annual decrease in the sector since the second petrol market crisis

)) Maintenance employment continues to grow. Estimated employment in 2010 was very optimistic.

) Decrease of the car sale service employment compared to the increasing situation in national employment.

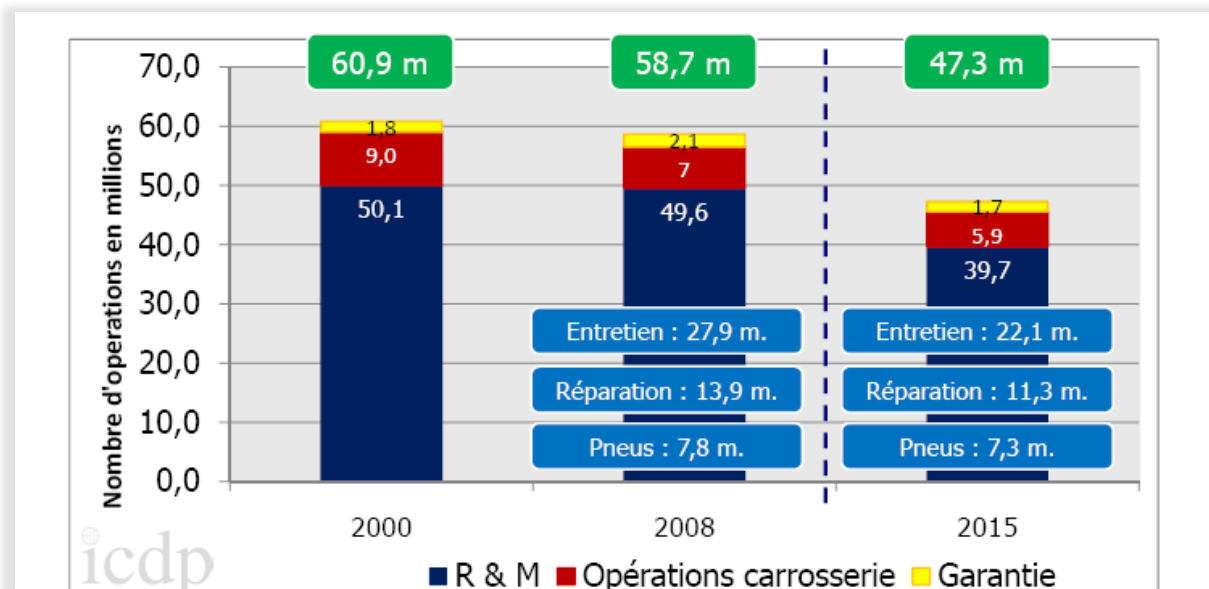


) New car sales evolution - Hypothesis 2010 - 2015



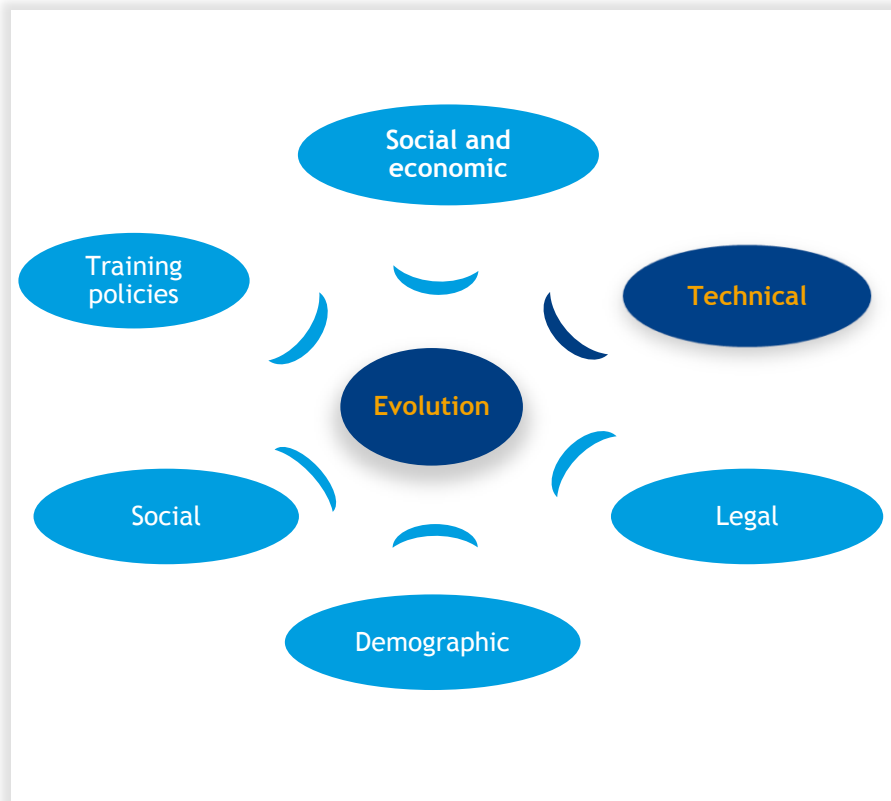
) After-sales evolution

)) With the growing level of reliability and decreasing number of garage visits, after-sale services might decrease



)) After-sales services sector decreases in the car manufacturers network

) Vehicles reliability



-) After the 2000-2002 period, vehicles became more reliable, thus decreasing the number of garage visits.
-) In order to find solutions to keep customers, development of vehicle and client databases.
-) Low cost cars development together with low cost repairs.

In order to repair a car one should possess knowledge in the electronic system of the car

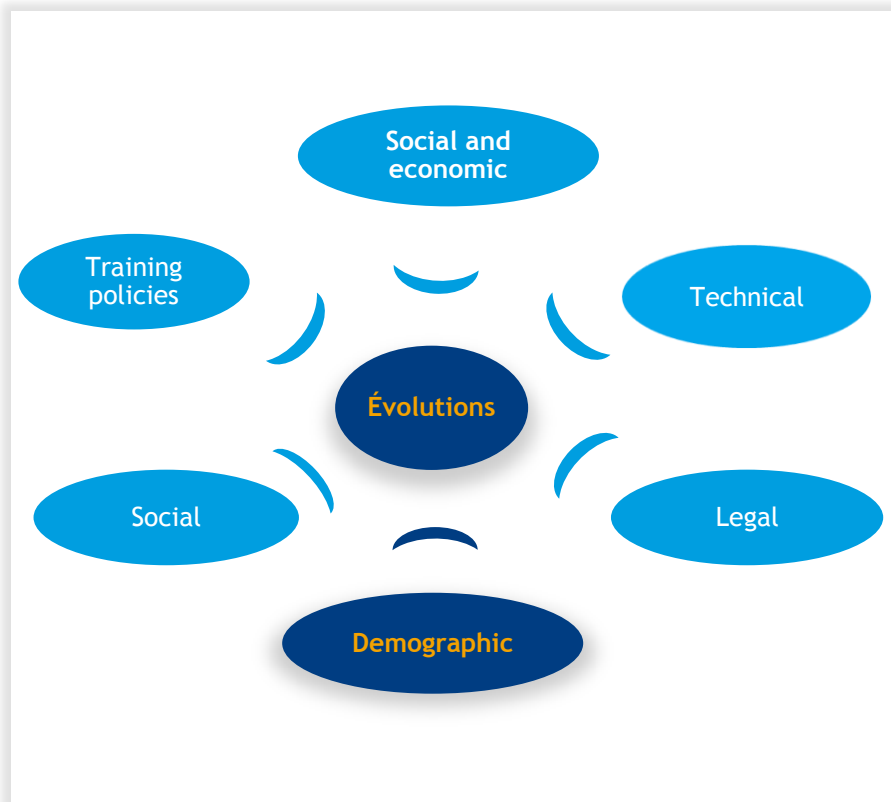
-) Electric vehicle development should offer new business approaches (batteries rent, mobility solutions, e.g. « autolib » in Paris - i.e. self-service electric car rentals)

) European legislation



-) In 2013, the distribution of new motor vehicles is managed by the European competition law's general rules - it is the end of the vehicles distribution's specific block exemption regulations.
-) The Motor vehicle after market continue to benefit from block exemption regulations (461/2010), permitting the access of technological information and to have one's car serviced during the warranty period for all repairers (authorized and independent repairers).
-) Pollution reduction European norms encourage technological innovation and new mobility system research.

) The aging population of owners and company managers

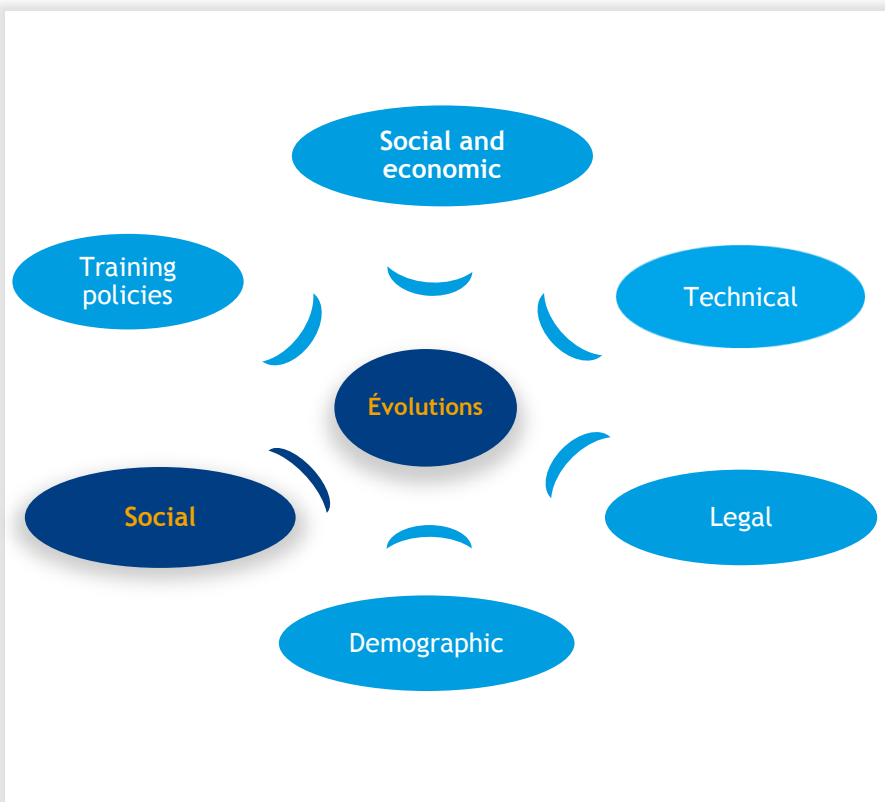


) Retirement of owners

- Problems with the takeover of the companies
- Placing the ex-employees of companies which have not been retained

) retirement of managers

- Replacement of the managers population



) Apprenticeship

- Sharp fall in the apprentices number since 2003

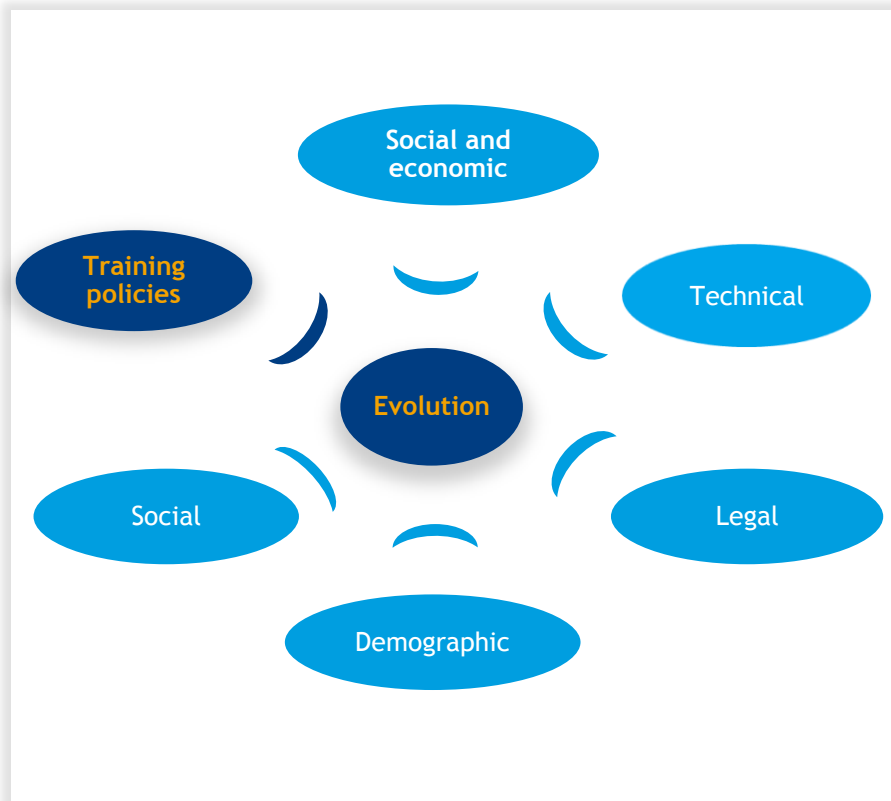
) Professional integration

- The first month plays an important role in long term integration

) Recruitment

- Permanent contract is the main contract of recruitment.
- Employers continue to use « word of mouth » to recruit.

) Qualifications



-) Development of training up to the Master's degree.
-) **Support plan of the automobile services branch (nov 2012 - oct 2015).**
 - « compétence-emploi 2 » including a section Employment and Expertise plan (E & EP), Support plan to conserve and develop the employment in the branch of the automobile services. - New agreement between government, social partners of the branch and ANFA.
-) Helping small companies and large companies of cars distributors in E & EP (Amendment 55 of 15/07/2009)
-) Creation of « CQP » in continuous training to the professionals.