

Key Economic Data Grenoble-Isère France



2014

Located in one of Europe's most dynamic regional economies

GRENOBLE-ISÈRE
CAPITAL OF THE FRENCH ALPS



France's Rhône-Alpes Region

- Comparable to Denmark in population and area
- . Europe's sixth-largest GDP at €193 bn
- . France's second-leading region for economic activity and tourism
- . France's top region for manufacturing
- . France's second-largest hub for R&D

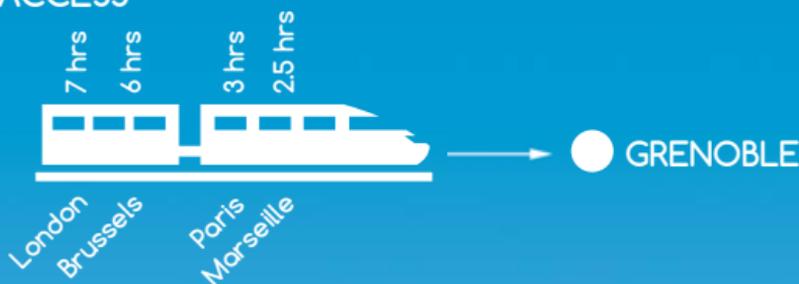


Your gateway to Europe and the world

DRIVING DISTANCES TO MAJOR CITIES



RAIL ACCESS



CONVENIENT ACCESS to three international airports

Direct flights to Paris, Amsterdam, London, Frankfurt, and Madrid



The Isère district: a population of 1 million and home to 500,000 jobs

A YOUNG, EDUCATED, AND ACTIVE POPULATION

- . 33% of the population is under age 25 (vs. 31% for all of France)
- . 29% of the population over the age of 15 has completed at least two years of higher education (vs. 25% for all of France)



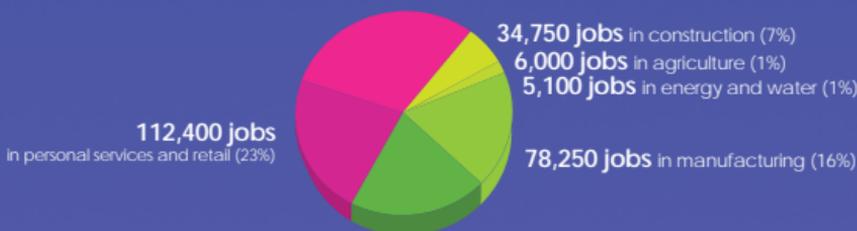
Diagram courtesy of AEP/INSEE/Eurostat 2013

Greater Grenoble metro area	745,800 inhabitants
Isère District	1,234,800 inhabitants
Rhône-Alpes Region	6,393,000 inhabitants
France	65,800,000 inhabitants
European Union	506,821,000 inhabitants

A STRONG MANUFACTURING BASE

- . 16% of jobs in Isère are in manufacturing (vs. 12% for all of France)

147,500 jobs in education, healthcare, social work, and government (30%)

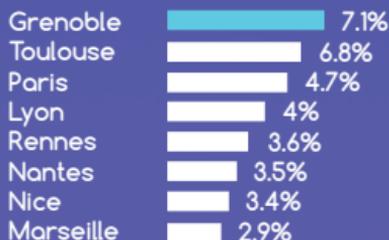


TOTAL: 489,000 jobs

Source: AEP/INSEE/URSSAF at January 1, 2013

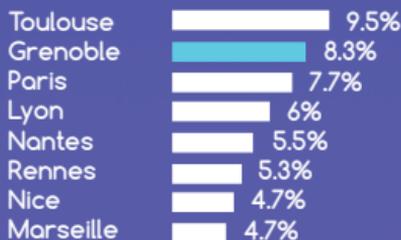
THE GRENOBLE METRO AREA: A WHITE-COLLAR, RESEARCH-DRIVEN JOB MARKET

France's number-one metro area for research jobs



Percentage of research and design jobs as a proportion of total jobs

France's number-two metro area for engineering jobs



Percentage of engineers in total workforce

Source: INSEE, 2010

A diversified economy



MULTINATIONAL CORPORATIONS DRIVE THE LOCAL ECONOMY

			Employees
STMicroelectronics	France/Italy	Microelectronics	6,000–7,000
Schneider Electric	France	Energy management	5,000–6,000
Caterpillar	United States	Construction equipment	2,000–3,000
Electricité de France (EDF)	France	Energy	2,000–3,000
Hewlett-Packard Company (HP)	United States	IT	1,500–2,000
Becton, Dickinson and Company (BD)	United States	Medical technology	1,500–2,000
Capgemini/Sogeti	France	IT	1,000–1,500
Soitec	France	Microelectronics	900–1,000
Tecumseh Europe	United States	Refrigeration units	900–1,000
Calor	France	Household appliances	900–1,000

A BROAD RANGE OF INDUSTRIES REPRESENTED

	Number of jobs
Metallurgy, metalwork	24,300
Electrical equipment and electronics	23,800
Digital technologies, software, engineering, and consulting	21,700
Wholesale	18,000
Logistics and shipping	16,200
Chemicals, plastics, pharmaceuticals, and equipment	14,600

GLOBAL LEADERS, BORN IN ISERE

STMicroelectronics, Schneider Electric (formerly Merlin Gerin), Soitec, Capgemini, Petzl, Poma, A Raymond, Rossignol, Vicat, Radial, Teisseire, Airstar, and more.

A trade surplus of more than €1 billion

A location of choice for foreign investors

4 OUT OF EVERY 10 MANUFACTURING JOBS IN ISÈRE
ARE WITH FOREIGN-OWNED FIRMS



- 5 of the top 10 private-sector employers are foreign-owned firms
- More than 30 countries have business interests in Isère
- Isère is home to 470 foreign-owned firms that provide 41,000 jobs

THE UNITED STATES, GERMANY, AND THE UNITED KINGDOM
Isère's top three sources of foreign investment



United States

122 companies and 13,000 jobs
Caterpillar, HP, BD, Xerox, Oracle,
and Salesforce.com



Germany

71 companies and 3,900 jobs
Siemens, Hager Security, and
Sigma-Adrich



United Kingdom

40 companies and 3,000 jobs
Rolls-Royce Civil Nuclear, e2v, and
Rexam

Source: AEFI

International high-tech clusters



DIGITAL TECHNOLOGIES

40,000 jobs
6,800 students

Minalogic global competitive cluster for smart miniaturized solutions. 259 R&D projects certified for total spending of €1.87 bn (incl. €726 m in public funding). 225 members, 84% of which are SMBs.

Electronics and micro- and nanoelectronics

25,000 jobs

22,000

3,000

in private-sector companies

in government-funded research

- €10 bn invested since 2002; €3.5 bn invested in 2013 in the Nano 2017 program
- Home to one of the world's top five micro- and nanotechnologies clusters and Europe's largest
- Home to one-third of France's electronic component manufacturing jobs
- Renowned expertise in electronic design automation and nanoelectronics design software

Companies operating in Isère: STMicroelectronics, Soitec, e2v, Sofradir, Ulis, Trixell, Thales Electron Devices, Thales Avionics, ARM, ASML, AMAT, Mentor Graphics, Synopsys, Cadence, Air Liquide Electronic Systems, Tokyo Electron, Lam Research, Atrenta, Tronics, Dolphin Integration, Radiall, Movea, and 40-30.Radiall, Movea, and 40-30.

IT and software

15,000 jobs

13,000

2,000

in private-sector companies

in government-funded research

- A hub for R&D in hardware-software convergence and the internet of things
- One-fourth of jobs in the industry are in R&D (public and private sectors combined)
- A high-quality workforce: "One of the largest pools of talented engineers anywhere." Parker Harris, Salesforce.com

Companies operating in Isère: HP, Bull, Capgemini, Xerox, Oracle, Orange L@bs, Atos, Salesforce.com, Kelkoo, Business&Decision Eolas, Autodesk, The Mathworks, Bonitasoft, Spartoo, and Persistent Systems.



MEDTECH AND HEALTHCARE

Lyonbiopôle global competitive cluster for vaccines and diagnostics. 135 R&D projects certified for total spending of €671 m (incl. €269 m in public funding). 136 members, more than 80% of which are SMBs. Lyonbiopôle works in partnership with Minalogic.

10,000 jobs

7,700

2,300

5,000 students

in private-sector companies

in government-funded research

- €300 m invested over the past decade in projects like Clnatec and Nanobio
- A strong network of support from organizations like Lyonbiopôle, Minalogic, I-Care, Tasda, Canceropôle, and Clara
- Grenoble University Medical Center is France's second-leading center for neurology and traumatology and the country's tenth leading hospital overall; 1,200 clinical trials in progress

Companies operating in Isère: bioMérieux, Roche, BD, Trixell, Fluoptics, Movea, Tornier, Rexam Healthcare, Eveon, Endocontrol, Genostar, Technidata, Maatel, Fresenius Vial, and Patheon.

CHEMICALS AND CLEANTECH

Axelera global competitive cluster for the chemical and environmental industries. 139 R&D projects certified for total spending of €636 m. 280 members, half of which are SMBs.

11,000 jobs

9,500

1,300

in private-sector companies

in government-funded research

- Grenoble was France's first urban area to implement an Air & Climate Plan in 2005
- 80% of France's private-sector research in eco-construction, materials, and processes takes place in the Rhône-Alpes Region, with a particularly dense concentration in northern Isère
- The area is home to three chemical parks that have implemented industry-leading environmental measures

Companies operating in Isère: Arkema, Air Liquide, Adisseo, Vencorex, Solvay, Bluestar Silicones, Tera Environnement, Ethera, Kernéos, Parexlanko, Ferrari, Xella, Areva, Cofely, Evonik, Vicat, and Lafarge.



NEW ENERGY TECHNOLOGIES

Tenerrdis competitive cluster for new energy technologies. 210 R&D projects certified for total spending of €1.2 bn (including €400 m in public funding). 225 members, more than 60% of which are SMBs. Tenerrdis works in partnership with Minologic.

12,000 jobs
1,200 students

10,000

in private-sector companies

2,000

in government-funded research

- . Home to Europe's first industrial-scale fuel-cell production line (for hydrogen-powered vehicles)
- . The world's first life-sized smart-grid experiment, GreenLys, was rolled out in Grenoble and Lyon
- . Grenoble is the world's hydro-turbine capital and home to Alstom Hydro's global hydroelectric technology center

Companies operating in Isère: Air Liquide, Schneider Electric, Alstom Hydro France, Atos Worldgrid, Eaton, EDF ENR PWT (formerly Photowatt), SymbioFCell, McPhy, Soitec, Siemens, and Paxitech.



A large student population



One out of every five Grenoble residents is a student. The city is home to 61,300 students, including 46,000 at Grenoble University.

HIGHER EDUCATION WITH A FOCUS ON THE SCIENCES AND INTERNATIONAL PROGRAMS

- . 42% of students are enrolled in science programs
- . 45% of Ph.D. students are international
- . 10.6% of the total student population is international



Source: INSEE, RP, 2009

INTERNATIONALLY-RECOGNIZED EXCELLENCE IN HIGHER EDUCATION

- ▶ Grenoble University's Joseph Fourier School of the Sciences ranked 5th in France in the Shanghai Ranking (ARWU)
- ▶ Grenoble Institute of Technology ranked 2nd among France's engineering schools in the QS World University Ranking
- ▶ Grenoble Ecole de Management ranked among the top 5 business schools in France, the top 25 in Europe, and the top 50 worldwide

GRENOBLE, THE WORLD'S 5TH MOST INVENTIVE CITY*

- . 7.69 patents filed per 10,000 inhabitants
 - . 200 start-ups spun off from government-funded research labs in the last decade
 - . The CEA is France's second-leading patent filer (behind auto manufacturer PSA and ahead of aerospace giant Safran); 80% of the CEA's patents stem from research at CEA-Grenoble
- (Source: INPI 2012)

*According to the Forbes ranking of the world's 15 most innovative cities (July 2013)

More R&D jobs than any other place in France

Isère is home to 25,000 R&D jobs, including:

- . 15,000 jobs at government-funded research labs
- . 10,000 at private-sector R&D centers

STRONG GOVERNMENT-FUNDED RESEARCH

. Grenoble is home to large international scientific instruments

. Local research is highly interdisciplinary

EMBL (European Molecular Biology Laboratory)
ESRF (European Synchrotron Radiation Facility)
ILL (Institut Loue Langevin)
EMFL (European Magnetic Field Laboratory)
IRAM (International Research Institute for Radio Astronomy)

CEA (The French Alternative Energies and Atomic Energy Commission)

CEN (The National Center for Snow Studies)

CNRS (The National Center for Scientific Research)

CSTB (The Center for Science and Technology for the Construction Industry)

INRA (The National Institute for Agricultural Research)

INRIA (The National Institute for Research in Computer Science and Automation)

INSERM (The National Institute for Health and Medical Research)

IRSTEA (The National Institute for Research in Environmental and Agricultural Technology)

. Grenoble's R&D ecosystem focuses heavily on transferring new technologies to industry

PRIVATE-SECTOR R&D CENTERS

. HP, Xerox, Salesforce.com, Siemens, Oracle, Air Liquide, Ahlstrom Paper Group, BD, STMicroelectronics, Schneider Electric, Orange L@bs, Bull, Alstom Hydro, Lafarge, Vicat, Soitec, and bioMérieux.

WORLD-CALIBER ACHIEVEMENTS IN SCIENCE

- . 3 Nobel Prizes in Physics (1961, 1970, 1985)
- . 2 Nobel Prizes in Chemistry (2009, 2012)
- . 1 Turing Award (2007)
- . 1 Blue Planet Prize (2008)
- . 1 Wolf Prize in Physics (1985)
- . 1 Droper Prize (2014)

Made with pride in Isère



Cable transportation systems worldwide, with flagship projects in the United States, Brazil, Egypt, China, and Russia.



Safety equipment for climbing, caving, work-at-height, and search-and-rescue.



The global leader in lighting balloons, Airstar's innovative lighting and event solutions are at the crossroads of technology and design.



HP's Grenoble campus is behind the technology that drives 70% of the world's text messages.



Ski equipment and outdoor apparel with headquarters and marketing and design departments based in Isère.



"Chartreuse, the only liquor so good they named a color after it."
Quentin Tarantino in Death Proof.



CHARTREUSE

Flagship local development projects



GIANT (Grenoble Innovation for Advanced New Technologies)

Located in Grenoble, this global innovation campus will contribute to overcoming some of society's major technological hurdles in the fields of energy (GreEN), healthcare (Nanobio), and communication (MINATEC).

- . 250 hectares
- . €1.2 bn in investment through 2015
- . 10,000 residents
- . 10,000 students
- . 10,000 manufacturing jobs



THE SALAISE-SABLONS RIVER PORT AND INDUSTRIAL COMPLEX

A strategic complex with advanced industrial ecology and multi-modal transportation practices

- . 340 hectares in the Rhône Valley
- . 40 minutes from Lyon and Valence
- . Multimodal transportation infrastructure for river, rail, and road
- . The 2nd largest rail and river terminal in the Rhône-Saône basin
- . 900 jobs, mainly in manufacturing
- . Focus on ecotechnology, renewable materials, smart distribution, and high-tech chemistry



An attractive commercial property market

AVAILABLE COMMERCIAL PROPERTY

- 624 hectares of commercial land
- 163,600 sq. m of office space
- 767,870 sq. m of commercial buildings, including logistics facilities

Source: AEPI, Dec. 20, 2013

BUSINESS PARKS SPECIALIZING IN STRATEGIC INDUSTRIES

From manufacturing and high-tech to chemicals, logistics, and green IT, Isère is home to a broad range of business parks.

1. Bièvre Dauphine Industrial Park
2. La Grande Île Industrial Park
3. Centr'Alp 2 Industrial Park
4. Le Parc Technologique High-tech Business Park
5. Salaise-Sablons Port and Industrial Complex
6. Parc de Chesnes Logistics Park
7. Parc d'activités des Couleurs Business, Industrial, and Logistics Park
8. Grenoble Air Parc Aerospace Park
9. Euréalp Business and Industrial Park
10. Inovallée High-tech Business Park
11. Roches-Roussillon Chemical Park
12. Grenoble Chemical Park



COMMERCIAL REAL ESTATE PRICES (new and renovated properties)

	Office space	Other commercial/ industrial space		Office space	Other commercial/ industrial space
Sophia Antipolis	160/200	90/130	Marseille	135/270	40/100
Lyon	155/285	42/75	Bordeaux	130/162	40/70
Montpellier	145/160	75/90	Lille	125/200	38/60
Grenoble	145/160	73/82	Toulouse	120/170	46/95

Prices are in € per sq. m per year, not incl. taxes and fees (source: CBRE, 06/13)

In Grenoble, office leases range from €145 to €160 per sq. m per year; other commercial/ industrial leases range from €73 to €82 per sq. m per year (not incl. taxes and fees).

Quality of life, a prime advantage

GRENOBLE AND ISERE, SUSTAINABILITY AND ENVIRONMENTAL RESPONSIBILITY

- Isère is home to 3 of the 13 "EcoQuartier"-certified green neighborhoods in France
- Grenoble was France's first urban area to adopt a Climate Plan (2005)
- GIANT was one of 13 projects to earn "Ecocité" certification from the French Ministry for Sustainable Development; the project represents €1.4 bn in investments over ten years
- The Greater Grenoble Intermunicipal Authority won a French government award for its support of energy-efficiency improvements to buildings for its insulation campaign in 2013

QUALITY INTERNATIONAL EDUCATION

Some 1,500 students of all ages enrolled in Grenoble-area schools benefit from international programs taught in languages other than French.

The Grenoble International School is public and, therefore, free of charge. It provides middle- and high-school students with instruction delivered in English, German, Arabic, Spanish, Italian, and Portuguese.

GRENOBLE, THE EU'S MOST ACCESSIBLE CITY

- Excellent public transportation
- Innov'Access, a groundbreaking program to promote handicapped accessibility
- One of France's top two bikeable cities with 300 km of bike paths





A RICH, INNOVATIVE PERFORMING-ARTS COMMUNITY

Home to national performing-arts programs

- . Hexagone de Meylan National Theater for the Arts and Sciences
- . Jean-Claude Gallotta and the National Center for Choreography of Grenoble
- . Mark Minkowski and les Musiciens du Louvre
- . Le Magasin National Center for Contemporary Art
- . MC2: Maison de la Culture Performing Arts Center

Offering a year-round calendar of cultural programming.

Grenoble's Museum of Art offers one of Europe's richest collections of 20th-century art.



SPORTS AND OUTDOOR ACTIVITIES

Grenoble-Isère is the perfect starting point for a broad range of sports and outdoor activities:

- . 30 minutes from the nearest ski resort
- . Water sports
- . Extreme sports
- . Hiking for all ages and abilities in the Ecrins, Chartreuse, and Vercors natural parks

The place for active lifestyles!



A broad range of arts, culture, and sporting activities

FESTIVALS, PERFORMANCES, AND SPORTING EVENTS ALL YEAR ROUND

Cabaret Frappé contemporary music festival, Festival Berlioz classical music festival, Jazz à Vienne jazz festival, Festival du Théâtre Européen à Grenoble theater festival, Coupe Icare free-flight and aerial sports festival, Jumping International equestrian competition, Critérium Cycliste du Dauphiné cycling race, la Foulée Blanche cross-country ski race, la Traversée du Vercors backcountry and cross-country ski race, and more.



The Grenoble-Isère Economic Development Agency, or AEPI, leverages the research of its in-house economic observatory to deliver unique insights into the area's world-class industries and promote foreign investment in this dynamic economy.

The Isère General Council is the AEPI's main source of funding. The agency's role is to contribute actively to local economic development by:

- . Reaching out to French and foreign firms that could benefit from a foothold in Isère
- . Assisting businesses throughout their relocation to the area
- . Helping local governments build effective economic development programs
- . Providing economic intelligence through the AEPI observatory
- . Promoting Isère as a smart place to do business



www.lcomunik.com

Traduction : SFM-Traduction

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