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risingSUD
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Economic Development Agency



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WELCOME
TO REGION *Sud*

risingSUD
Sud Provence-Alpes-Côte d'Azur
Economic Development Agency





WELCOME TO THE *Sud* REGION – OPENING REMARKS



Dear readers, welcome to the Sud region!

To facilitate your move to our territory, the Region Sud has considered everything you might need and prepared a welcome guide composed of two complementary volumes: **Welcome to the Sud Region** (which you have in front of you) & **the Practical Guide for Moving to the Sud Region**. These booklets contain all the essential information you will need to prepare for your arrival.

Let yourself be amazed by what awaits you and discover the diverse facets of the Sud region: the economic opportunities, the dynamic research & development ecosystem, the international appeal, the cultural vitality, the quality of life, and much much more.

The Sud region is an authentic territory with a global perspective that is sure to delight you, whether you are coming alone or with family and whether you love the outdoors, culture, or an entrepreneurial atmosphere.

Take one more step towards your new life!

DISCOVER THE *Sud* REGION

The Provence-Alpes-Côte d'Azur region is renowned among tourists worldwide, but along with its traditional postcard-perfect image, we can assure you that the South is embracing the future!

We are proud that we are an attractive region because of our ideal climate and our tremendous natural, cultural, and historical heritage... but let's not overlook our thriving and dynamic economic ecosystem. First, there is our acclaimed training and research network: international high schools, two universities with national labels of excellence, and globally recognized research centers, including the new 3IA center for artificial intelligence. Next, we have a focus on innovation that helps propel our companies; this includes eight competitiveness clusters, diverse business hubs, and four French Tech centers. We are also open to the world and easily accessible thanks to our high-quality infrastructure: Nice has France's #2 airport, Marseille has the #1 port in France and the #3 port on the Mediterranean, and there are high-quality road and rail networks. Finally, our economy features a rich fabric of highly innovative start-ups, SMEs, and micro-enterprises.

And of course, our region is also home to top international companies that are global leaders in strategic sectors such as aerospace, high-tech, defense, and agri-food. These companies' long-standing presence and continued expansion and recruitment prove that the Sud region's superb quality of life and excellent work conditions are a recipe for success.

Talents, entrepreneurs, project leaders, families, students... it is here, in one of the Sud region's six departments, that your future will be built! We will mobilize all of our resources and devote all of our energy to welcome and guide you to ensure your move to the region will be smooth and successful.

Bernard KLEYNHOFF,

President of the Commission on Industry, Innovation, and New and Digital Technologies.
President of risingSUD

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A woman with long blonde hair, wearing a straw hat with a blue band and sunglasses, is shown in profile, smiling and looking out over a scenic coastal view. She has a red backpack on her back. The background features a vibrant blue sky, a clear blue sea, and a harbor filled with numerous white sailboats. In the foreground, there are green trees and a stone wall. The overall atmosphere is bright and sunny, suggesting a perfect day for a vacation.

ENJOY AN EXCEPTIONAL
ENVIRONMENT AND A
mosaic OF TERRITORIES

WELCOME TO THE SUD PROVENCE-ALPES-CÔTE D'AZUR REGION!

Renowned throughout the world, the Sud Provence-Alpes-Côte d'Azur region is an inspiring and authentic territory. The region has produced, helped develop, or welcomed leaders and entrepreneurs from all over the world in the past and it will continue to do so in the future!

Characterized by a remarkable amount of sunshine, the region benefits from numerous natural areas that cover 75% of its territory. It offers diverse landscapes that blend the sea, the countryside, and the mountains. **With 1000 kilometers of coastline, 68 winter sports resorts, nine regional nature parks, and four national parks**, the Sud region offers a wide variety of outdoor activities all year round. Thanks to its five UNESCO World Heritage sites and 400 museums, including five national museums, the territory also enjoys a bountiful cultural heritage that dates back more than a millennium. The Sud region's identity is marked by fragrances, flavors, and quality products that are iconic symbols of local life: olive oil, lavender, Herbes de Provence,

Aix-en-Provence calisson-style cookies, Tarte Tropézienne, Carpentras-style berlingot fruit candies, navette cookies from the ovens of Marseille, Provençal tapenade, pissaladière salted treats from Nice, and rosé wine from the Var... These delicacies are joined by classic products such as perfumes from Grasse, tableware from the Verrerie de Biot, ceramics from Moustiers, soaps from Marseille, fabrics from the Camargue, essential oils, and much, much more.

Go from dreams to reality and come to the Sud region: onatousbesoindusud.fr [site in French]

Thanks to its rich social, economic, touristic, cultural, and sporting traditions, the region regularly hosts globally celebrated events, including the Formula 1 French Grand Prix, the Bol d'Or Endurance World Championship motorcycle race at the Circuit Paul Ricard in Le Castellet in the Var, the Formula One Monaco Grand Prix, the official Ironman triathlon in Nice, the Alpes Aventure Motofestival in Barcelonnette in Alpes de Haute-Provence, the Monte

Carlo Rally, the Enduro World Series mountain bike race in Les Orres in the Hautes-Alpes, the VentouxMan triathlon in the Vaucluse, the Challenge Ski Alpinisme 06 international ski competition in Alpes-Maritimes, the Tour Voile sailing competition and the French Olympic Week for sailing in Hyères in the Var, the Voiles de Saint-Tropez sailing competitions, and the SailGP races in Marseille. The region will also host Rugby World Cup matches in 2023 and events from the Olympic and Paralympic Games in 2024.

Beyond sports, **the Sud region is a dynamic and vibrant cultural territory** with more than 400 festivals held every year. Several of these festivals are internationally renowned, including the Cannes Film Festival, the Festival d'Aix for music and opera, the Roque d'Anthéron international piano festival, the Festival d'Avignon for theatre, the Nice Carnival, and the Rencontres d'Arles international photography festival. The territory also has a thriving cinema industry with more than 1500 days of filming per year.

Source: Region Sud, Economic Panorama 2020





BE A PART OF A REGION
WITH A STRONG AND
vibrant ECONOMY



01 AN ACTIVE POPULATION AND A DYNAMIC ECONOMY



Marseille (13)

DEMOGRAPHICS

- **5th-largest French region** with 5.02 million inhabitants (+207 000 inhabitants in 10 years)
- **55% of the population is between 15 and 59 years old**
- **More than 2.2 million working-age people**, with an activity rate of 72.1%
- **78% of the population is concentrated in the region's four metro hubs:** Aix-Marseille (1 878 061), Nice-Côte d'Azur (563 000), Toulon-Provence-Méditerranée (434 982), and Greater Avignon (192 966)

BUSINESS & EMPLOYMENT

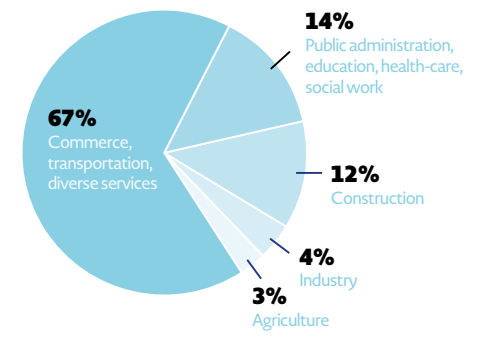
- **More than 613 000 businesses**
- **More than 4900 companies** with at least 50 employees
- **Substantial increase in companies created:** 69 330 in 2018 (11 170 more than in 2017), which makes it the #3 region for new businesses (in 2017)
- **1.9 million jobs** in the Sud region
- **SMEs = 95% of the region's economic fabric**

WEALTH

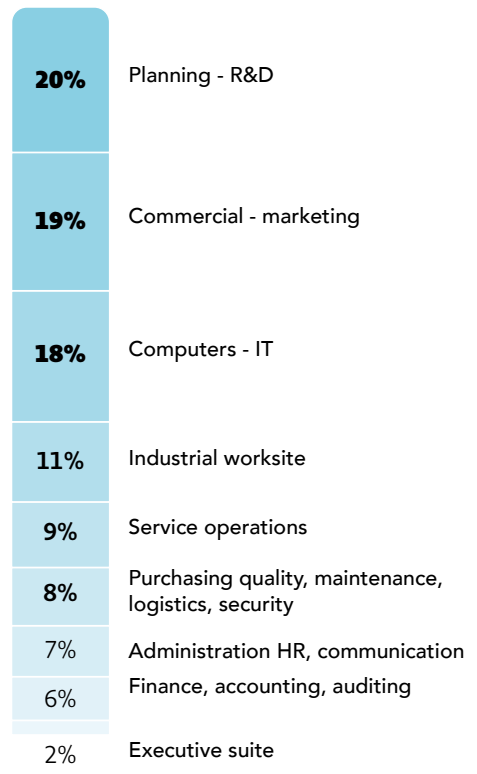
- GDP for the region: **€155 billion**
- GDP per capita: **€31 400 - #3 region in France**
- **14th richest region in Europe**
- Value Added in region: **€138 billion**

- Recruitment of executives and professionals in 2018: **16 070 new hires**, (+16% in one year)

Distribution of companies by sector



The predicted share of executive and professional recruitment by sector in Provence-Alpes-Côte d'Azur and Corsica in 2019.



SOME HIGH-POTENTIAL BUSINESSES AND MAJOR CORPORATIONS IN THE SUD REGION

AIRBUS

Airbus Helicopters is the second-largest private employer in the Bouches-du-Rhône with more than 10 000 personnel (employees and subcontractors). The company chose to set up its main production site in Marignane, just outside of Marseille. At the forefront of aeronautical technology for more than 60 years, the Marignane site is the birthplace of Airbus Helicopters, the world leader in the civil and military helicopter markets.

AMADEUS

Ranked among the top 15 IT companies in the world in 2019, Amadeus provides technology that is exclusively dedicated to the global travel industry. The Sophia Antipolis site hosts the company's main R&D center, which is where the major design and development is done for its products. Amadeus benefits from an exceptional local ecosystem with 4500 people representing more than 60 nationalities.



European leader in phytotherapy and dietary supplements, Arkopharma chose Carros outside of Nice for its only production site. The pharmaceutical company has 1200 employees and seven international subsidiaries. The six-hectare site in Carros includes an R&D center, a supply chain, a marketing office, and a production facility.



A pioneer and global leader in aromatherapy and home cosmetics, Aroma-Zone transferred its headquarters, R&D center, and production facilities to the Vaucluse in 2005. With one million customers and a turnover of €80 million, it has now expanded from e-commerce and opened six boutiques in France, with more boutiques to come.



A producer of bases and concentrates to make beverages, Coca-Cola Midi is part of the Coca-Cola Company. As the second-largest exporter in the Var, the plant employs 210 employees and exports its products to 66 countries. Located in the Signes business park, the company plays a vital role in the local ecosystem with initiatives such as joint recruitment programs, a shared fitness coach for companies, and the creation of a daycare center.



Established in the Alpes-de-Haute-Provence, the Collines de Provence factory produces home fragrances and natural cosmetics by hand. From its contracts with suppliers of raw materials to its work with local artisans, the company is essential to the local ecosystem. Since 2016, Collines de Provence has been recruiting and strengthening its teams in order to fulfill exports to approximately 30 countries. The products are available online and are also distributed at 950 points of sale in France.



A world leader in shipping and logistics, CMA CGM is based in Marseille and employs 2400 people in the city. The company built the tallest building in Marseille to house its corporate headquarters. Deeply committed to the city of Marseille, CMA CGM contributes to the development of the region through numerous projects such as the opening of its first international incubator in 2018 and the construction of the Tour Mirabeau, which should welcome companies in 2023.



From design to manufacturing, Kapsea is a renowned specialist in sturdy and sustainable lighting solutions. Already present in Taiwan, China, and the United States, the company generated revenues of \$100 million in 2018. In order to continue its development, Kapsea has set up facilities in Chorges in the Hautes-Alpes, where the availability and competitive prices of commercial real estate are undeniable advantages.



L'Occitane en Provence manufactures and markets cosmetics and wellness products worldwide. The company's products are created in the Alpes-de-Haute-Provence using natural ingredients from local producers. The presence of this global leader in the territory has created a blossoming network of companies in the cosmetics sector.



A French company founded in 1988 in Ribiers in the Hautes-Alpes, OvinAlp designs and produces fertilizing solutions for professionals. Established at its supply source, OvinAlp has an ultramodern production unit and dedicates 3% of its turnover to research and innovation. The company was born from local traditions and, thanks to innovation, it continues to develop and now has 85 employees.



An international food group with sales of nearly \$5 billion, McCormick established itself in the Vaucluse in the 2000s by acquiring the Ducros and Vahiné brands. Taking over the existing sites enabled the company to benefit from local expertise in the production of herbs and spices. The group continues to develop new products.



As the European leader in naval defense and the leading supplier to the French navy, Naval Group produces some of the most complex equipment in the world and has an extremely high-skilled workforce. Located in the Var region, the group has joined forces with the start-up Cartesium to meet new naval maintenance challenges using NanoEdge AI Studio technology, which integrates machine learning into everyday objects. In 2019, this global leader accounted for 40 000 jobs in the French naval industry and generated €3.7 billion in revenues.

For more information on the companies present in the Sud region, contact the regional representatives.

A SELECTION OF MAJOR PROFESSIONAL EVENTS SOME MAJOR RECURRING OR ONE-OFF PROFESSIONAL EVENTS IN THE OF INTEREST TO THE REGION (O.I.R.) STRATEGIC SECTOR PROGRAM:

SIGNIFICANT ECONOMIC EVENTS IN THE REGION

Every year, the Sud region is host to key professional events related to its sectors of excellence.

- By participating in one of these events, you will be able to meet fellow professionals, share your experiences, expand your network, discover new business opportunities, and unearth new talent.
- As a speaker, you will have the opportunity to present your expertise at an international level and receive recognition for your research and experience.
- These events also present strategic and economic opportunities for the host cities and venues.

The Sud region benefits from a reliable and dynamic economy that helps to ensure the success of events. The major events unit of the regional convention office, Provence Côte d'Azur Events, is always eager to help you.



ENERGIES OF TOMORROW —

Floating Offshore Wind Turbines

Congress (Marseille) is the world's largest event dedicated to floating offshore wind energy. It is an international event with more than 50% of participants from outside of France, and numerous official delegations and global companies.

www.fowt-conferences.com/en

ITER Business Forum (Sud region) helps keep industrial companies informed about the progress of the ITER project, purchasing procedures, and upcoming calls for tenders, while also facilitating industrial contacts and partnerships within Europe and around the world.

www.iterbusinessforum.com

BLUE ECONOMY —

Euromaritime (Marseille) is a professional trade show for the main industrial and economic stakeholders in all sectors of the marine and river economy (construction, equipment, ship repair, fishing, marine renewable energy, waterways, and ports). The trade show presents all the expertise and technological innovations in the sector.

www.euromaritime.fr/9-visitors

System Factory Day (Toulon) brings together large companies, SMEs, and start-ups in the fields of maritime safety, security, and sustainable development of the sea and coastline, while highlighting the cutting-edge technologies of the System Factory project.

www.systemfactory.fr [site in French]

SUD REGION THAT ARE CONNECTED TO THE OPERATIONS

INDUSTRIES OF THE FUTURE —

Forum Industria Méditerranée

(Nice) is an annual industrial convention that aims to enhance the reputation of industrial professions and promote industrial expertise. It also serves as a technological showcase where companies can present products and services, unveil innovations, and demonstrate their expertise to a qualified professional audience.

French Fab Tour (events in Marseille, Nice, and Toulon) is an exceptional national tour with 60 events throughout France that bring together students, job seekers, and industrial ecosystems. The aim is to promote industry, encourage young people to take up an industrial career, propose job offers, and co-create the industry of tomorrow.

www.lafrenchfab.fr/tournee [site in French]

NATURAL LIVING —

MED'AGRI (Avignon) is a trade show dedicated to all of the agricultural sectors and it welcomes more than 15 000 professional visitors over three days. It is attended by producers (wine growers, vegetable and fruit growers, arboriculturists, olive growers, breeders, horticulturists...) from the Sud region and neighboring regions, as well as stakeholders in the agricultural production sector.

www.med-agri.com [site in French]

SILVER ECONOMY —

Ageing Fit (rotates between the French cities of Lille and Nice) is a convention that boosts innovation in the Silver Economy and healthcare sectors, while promoting innovative products and services for the seniors market. This event is a platform for preselected meetings, partnerships with financing structures, sourcing of innovative technologies and products, and exchanges between private and public stakeholders, SMEs, and micro-enterprises.

www.ageingfit-event.com

INNOVATIVE THERAPIES —

BioFIT (rotates between the French cities of Lille, Strasbourg, and Marseille) is the European meeting point for technology transfer and innovation research. The trade fair brings together academics, technology transfer organizations, and research institutions in the field of biotechnology. More than just a trade fair, BioFIT is the place where university-industry collaborations begin.

www.biofit-event.com/biofit-event/organisers

SMART TECH —

Emerging Valley (Aix-en-Provence) is a new hub for emerging innovations between Europe and Africa. This international summit attracts African investors, start-ups, and emerging digital ecosystems that want to strengthen their international appeal, develop their business relationships, and accelerate their impact on a global scale.

www.emergingvalley.co/?lang=en

OCOVA AlpMedNet (Les Orres) is part of the Alps-Mediterranean Euroregion program and is dedicated to IoT, ICT, and communicating solutions. Its goal is to facilitate innovation and to put companies, key accounts, and end-users in touch with each other. Among its working areas are the development of tourism potential and cultural heritage through new means of communication; using technology to control and sustainably manage water, energy, waste, and natural and industrial risks; and new modes of transport.

www.ocova.eu [site in French]

Trustech Event (Cannes) is a payments, identification, and security trade show that acts as a global marketplace and welcomes international exhibitors, sponsors, and start-ups. It's a great place for companies to showcase their latest innovations and announce the launch of new products and solutions.

www.trustech-event.com

TOURISM AND CREATIVE INDUSTRIES —

FOOD HOTEL TECH (Nice) is a trade show dedicated to technological and digital innovations for hotels, restaurants, and beach resorts. Its ambition is to attract the largest number of decision-makers from the HoReCa (Hotels-Restaurants-Cafés) sector in the Mediterranean basin and to facilitate meetings and exchanges.

www.foodhoteltech.com/en/

HEAVENT Meetings (Cannes) is a business convention dedicated to event venues, hotels, event agencies, and service and technical providers. It is a privileged crossroads for meetings and networking thanks to its business platform that allows meetings to be organized between top decision-makers and exhibitors.

www.heavent-meetings.com/en

ECONOMIC CONFERENCES / OTHER KEY SECTORS —

International Private Equity Market (Cannes), is Europe's largest private equity conference and trade show, focusing on business meetings between institutional and private investors, fund managers, service providers, and entrepreneurs seeking financing for their development. The event welcomes more than 1200 private equity players from

35 countries, including 250 investors and 200 entrepreneurs.

www.ipem-market.com

Rencontres économiques d'Aix-en-Provence is a major gathering for reflection and debate in France's economic world. Every year, it brings together more than 300 economic stakeholders, academics, and political and social leaders from around the world. At the end of the three days of meetings, the Cercle des Économistes publishes a final statement that includes a series of proposals.

www.lesrencontreseconomiques.fr/en/

Méditerranée du Futur (Marseille) is a one-day event dedicated to Euro-Mediterranean cooperation that brings together high-level speakers. It focuses on three themes: i) finding ambitious projects to finance on both shores of the Mediterranean; ii) meeting key investment players in a special atmosphere that facilitates networking; and iii) detecting investment opportunities in the Mediterranean.

mediterraneedufutur.com/en/home/

MIPIM (Cannes) is the world's leading trade show for real estate professionals and it brings together the most influential stakeholders in the international real estate industry. It offers a diverse four-day program of conferences, workshops, case studies, and networking opportunities.

www.mipim.com/en-gb.html


Salon des Entrepreneurs (Marseille) is a meeting place for creators, start-ups, and executives. With 10 000 visitors per year, this trade show offers a unique opportunity for economic stakeholders to present their tools and solutions. Alongside the trade show, there are conferences, debates, and activities to share expertise and to associate a company's brand with the can't miss event for entrepreneurs.


www.salondesentrepreneurs.com/fr/marseille [site in French]

Non-exhaustive list

FOR MORE INFORMATION ON EVENTS IN THE SUD REGION, PLEASE CONTACT:

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02 AN INNOVATIVE TERRITORY

#3

French region for innovation
with 396 European
patent applications

#3

**French region for
R&D researchers**

The Sud region

an exceptional combination of:

- **8 competitiveness** clusters
- **a network of research** centers
- **4 cutting-edge** universities
- **8 world-class** laboratories
- **industry** associations
- **technology** platforms
- **technology transfer** specialists
- **start-up incubators**

The territory is **the #2 French region for international R&D investments** and more than **29 000 people** work in this sector (including 19 000 researchers), while the Sud region is also home to Europe's largest technology park: Sophia-Antipolis.

A few more key figures:

- **8543 public-sector researchers**
- **10 836 private-sector researchers**



The Sud region shines thanks to the vast array of expertise and savoir-faire found in its territories.

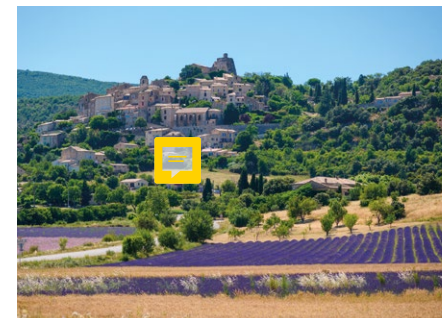
With thriving sectors such as agriculture, food processing, cosmetics, the blue economy, military and civil safety and security, research and innovation, industry, and tourism, the region is capitalizing on its areas of excellence with strong development potential.

Each territory has a strong identity and contributes to the overall economic vitality of the region.

ALPES-DE-HAUTE-PROVENCE (04),
land of Fragrances and Flavors

The fragrance and flavor sector includes major food and cosmetics companies whose leaders have made the Alpes-de-Haute-Provence internationally renowned. As France's leading producer of fragrant plants, the department offers a privileged environment to develop industrial projects with high added value.

The agricultural and food industry benefits from rich local traditions that facilitate the highest possible quality of processing and are officially recognized through the territory's 17 agricultural quality certifications. These symbols of quality are the fundamental link between a product, a territory, and a savoir-faire.



The fragrance-flavor industry in figures:

- **€348 million worth of exported products**, i.e., more than 55% of total departmental exports
- Sector **features 205 companies** and **2220 employees**
- Portion of employment in the agricultural and food industry is proportionally 80% higher than the regional average

The flagship structures in the ecosystem

- **The Terralia-PASS competitiveness cluster** (Perfumes, Aromas, Fragrances, Flavors), which was rebaptized Innov'Alliance in June 2020, is an international showcase, a strong economic stimulus, and a true hub for scientific and technological development
- **The La Cassine industrial park** has the most land and space for companies out of all such facilities in the Sud region
- **The UESS (European University of Flavors and Fragrances)** in Forcalquier provides training for both professionals and the general public

ALPES-MARITIMES (06)

(The Côte d'Azur),
an international reference in

Research and Development

The Côte d'Azur is globally recognized as **an advantageous and highly appealing destination** for companies, investors, and international business travelers.

The Côte d'Azur supports a high-performance ecosystem focused on innovation and development and it has a research community that includes 5000 researchers in information and communication technologies, life sciences, and ecotechnologies. There are also 44 research laboratories, including major national institutions such as CNRS, INRIA, and Mines Paris Tech.

The territory features a robust business and innovation network that helps propel sectors of excellence

such as CleanTech, Services, HealthTech, IT, and nutricosmetics. There is an international talent pool with more than 35 000 students, 20% of whom are

international, more than 400 companies, as well as a dozen incubators and accelerators and high-performance infrastructure. The Côte d'Azur, which has the official 3IA label for its expertise in AI, brings together the entire artificial intelligence ecosystem with focuses on eHealth and Smart territories. All of this makes the Côte d'Azur a place where talent and development opportunities converge.

- **Sophia-Antipolis**, Europe's #1 technology park, is home to the largest concentration of international R&D centers in France
- **Nice Écovallée**: one of the biggest O.I.N. national infrastructure projects in France that generates growth and jobs connected to green technologies and Smart cities
- **The Carros Industrial Activity Zone** is part of the French government's "Territoire d'Industrie" program and it is home to 600 companies, 10 000 jobs, and €1 billion in annual turnover



Nice (06)

The flagship structures in the ecosystem

- **ETSI and 3WC** are leading standardization organizations for the Information and Communication Technology (ICT) field that provide international guidance and mechanisms for the European and global marketplace; the European Heart House is a key administrative site for the European Society of Cardiology
- **IMREDD** (Mediterranean Institute of Risk, Environment, and Sustainable Development) is a reference center and cooperation link between the academic world, businesses, and the Côte d'Azur area
- **MIA** (Maison de l'Intelligence Artificielle) is a demonstration site and a place to share new technologies and ideas connected to Artificial Intelligence

BOUCHES-DU-RHÔNE (13),

a benchmark territory for the

Industries of the Future

The Bouches-du-Rhône features a diverse economy that is characterized by two major sectors: **industry and technology**. The department has a local environment conducive to the development of these sectors with connections to European platforms, adapted infrastructure, a wide variety of resources, and major research centers. Industrial activity is driven by cutting-edge facilities in the energy sector, including the La Mède biorefinery and the Berre L'Étang petrochemical hub, while the aeronautics sector is structured around major international companies such as Airbus Helicopters, Thales Alenia Space, and Dassault Aviation. The tech sector is supported by leading companies such as Thales Digital Identity and Security and STMicroelectronics, and their presence helps bolster the pool of skilled experts in the region.



Marseille (13)

Today, the entire value chain is represented in the territory's tech sector.

- **The industrial sector in Provence** represents more than 80 companies, 50% of which have international capital

The flagship structures in the ecosystem

- **SCS** (Secured Communicating Solutions) is a global competitiveness cluster dedicated to digital technologies with 310 members, more than €1 billion in R&D investments, and more than €250 million in fundraising already accomplished
- For 25 years, **Euroméditerranée** has been designing, developing, and

- **Airbus Helicopters** is the world's leading producer of civil-sector helicopters

- **14**: This is the number of subsea fiber optic cables connecting the territory to more than 4.5 billion people around the world

building the sustainable Mediterranean city of tomorrow in the heart of the Aix-Marseille-Provence metro area

- A unique space for entrepreneurial creativity, networking, and personal enrichment in the Aix-Marseille area, **CISAM** (Cité de Innovation et des Savoirs Aix-Marseille) is the collaborative brainchild of the world's largest French-speaking university, Aix-Marseille University

HAUTES-ALPES (05), *a Land of Opportunities* in a pristine natural setting

The Hautes-Alpes is a highly developed territory and **tourism is a driving economic force**, accounting for 35% of local wealth. This sector acts as a foundation for other activities such as retail, crafts, construction, agriculture, and food processing. There is an urban hub in Gap while sectors such as renewable energies, tech, and light aeronautics complete the territory's panorama of key economic activities. The department's exceptional natural sites have forged its reputation: there are **three major nature reserves** – Les Ecrins, Queyras, and Baronnies Provençales – as well as the Vauban fortifications in Briançon and Mont-Dauphin that are on the UNESCO World Heritage list, the Serre-Ponçon lake, the Route Napoleon, the mythical mountain passes at Galibier, Izoard, and Lautaret, and 27 mountain resorts such as Serre-Chevalier.



The Lake of Serre-Ponçon, the dam and the compensation basin, Espinasse

Photo credit: ©Bertrand Bodin

- **€1.23 billion in tourism revenue** and **15 000 jobs** in the tourism sector
- **Gap-Tallard is Europe's #1 airfield for aerial sports and leisure activities.** It is the foundation of an ecosystem with 15 industrial companies and the Polyaéro training center
- **One of the biggest sources of renewable energy in France** with the hydroelectric dam at Serre-Ponçon

The flagship structures in the ecosystem

- **The Micropolis and GAAAP incubators** in Gap and the Altipolis and Lucéo incubators in the Briançon-Ecrins area
- **Aix-Marseille University – Gap campus has five degree programs:** STAPS physical education studies, Business and Administration Management, Multimedia-Internet-Web Design, Sustainable Management of Mountain Territories, and Aeronautics
- **Capénergies:** This competitiveness cluster dedicated to energy sectors is a partner of the Hautes-Alpes to test new solutions in energy efficiency and smart grids (Emilie and Flexgrid projects)

THE VAR (83) and its maritime economy: a true *Mediterranean hub*

Throughout history, **the Var has been open to the Mediterranean**, and its economy has been heavily linked to the development of the navy, the merchant marines, pleasure boating, and all activities related to the sea... this tradition now serves as the foundation for numerous opportunities today. The territory excels in these fields thanks to a high-performance maritime ecosystem. The Toulon naval base has fostered the development of a world-class network of scientific, industrial, and research stakeholders that are focused on developing cutting-edge technology within the local economic fabric. **The department is home to leading companies** in the fields of ship maintenance and repair, maritime safety and security, and marine and submarine technologies such as Naval Group, CNIM, ECA Robotics, Alseamar, Lapp Muller, and Sofresud.



La Rade de Toulon (83)

Photo credit: ©Yves Colas

The Var also benefits from the presence of System Factory, an accelerator for innovative industrial projects aimed at maximizing the use of fully developed technological components in all of the territory's sectors.

- **Toulon naval base:** #1 industrial site and #1 employer in the Var department
- **Technopôle de la Mer in Toulon:** Europe's #1 science and technology park dedicated to maritime and coastal activities
- **432 kilometers of coastline, 300 beaches, 57 ports**

The flagship structures in the ecosystem

- **Pôle Mer Méditerranée**, is an internationally oriented competitiveness cluster with a network of more than 420 members focused on developing the maritime and coastal economy by promoting innovative projects and supporting the growth of companies. With the support of the TVT Innovation economic development agency, which assists start-ups and SMEs on technical and financial matters.
- **Riviera Yachting NETWORK** has more than 110 members around the Mediterranean basin that are dedicated to yacht refit, repair, and services.
- **IFREMER** is a research institution located on the Technopôle de la Mer's marine base and it is a major contributor to a number of scientific and technological fields. It is a European and global leader in aquaculture, the marine environment, fisheries, and underwater technology.

**THE VAUCLUSE (84),
a pioneer in food
innovation and natural living**

With a stellar international reputation for its tourism, culture, and lifestyle, the Vaucluse is a warm and welcoming territory that attracts talents, companies, and visitors every year. Thanks to its prime location and its highly developed transport infrastructure, the region enjoys a superb quality of life and has thriving, future-oriented economic sectors such as **agri-food, the creative and digital**

economy, tourism, cosmetics and well-being, industry, and logistics.

A pioneer in food innovation and natural living, **the Vaucluse is a leading agricultural production area** that hosts a vibrant fabric of micro-enterprises, SMEs, and large companies that are active throughout the value chain. The territory specializes in quality food (foodtech, organic, local, circular economy, etc.), plant-based ingredients (flavorings, active ingredients, etc.), food supplements, and natural cosmetics, as well as innovative solutions for agriculture

and winegrowing. The Vaucluse also benefits from a strong concentration of expertise and an ecosystem with many opportunities to join a business or start or take over a company.

- **Agri-food is the #1 industrial sector** in the Vaucluse
- Provence **is the #1 location for fruit production** and aromatic and medicinal plant agriculture in France
- **€7.7 billion in turnover** in the Sud region

The flagship structures in the ecosystem

■ **The Innov'Alliance** competitiveness cluster is a concentrated network of companies and research centers in the food, well-being, and natural living sectors. The cluster is surrounded by many other specialized structures such as the University of Avignon and its agrosciences faculty, the INRAE agronomic research institute, the CTCPA agro-food research institute, and the Food in Provence network.

■ **The Cité de l'innovation** (the Avignon technology hub) brings together a unique concentration of expertise to support companies in the natural living sector. Its network includes Ma Première Usine in Carpentras, which is an incubator for agri-agro production companies, and the Cité du Végétal in Valréas, which is an incubator specializing in plant development activities.

■ **The Campus des Métiers et des Qualifications 3A** (Agrosciences, Agribusiness and Food) brings together institutions and training centers, professional and inter-professional organizations, companies, competitiveness, innovation and research clusters, and technology transfer centers.



The Pont Saint-Bénézet in Avignon (84)

04 A REGION COMMITTED TO DEVELOPING ITS TERRITORY



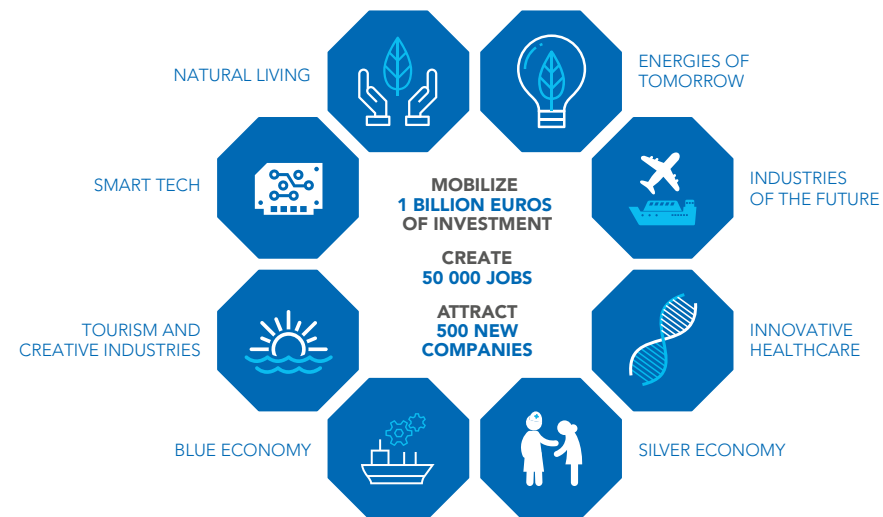
The Montagne Saint-Victoire outside of Aix-en-Provence (13)

Source: risingSUD, 2020

1. OUR STRATEGIC SECTORS AND OUR SECTORS OF THE FUTURE

In close partnership with the business community, the Region Sud has designed an economic policy that is based on specialization in eight strategic sectors that have a record of excellence, offer unparalleled advantages, and benefit from dedicated resources.

This policy is built around the Operations of Interest to the Region (O.I.R.) strategic sector program that aims to support and consolidate major structural projects in the regional territory and to encourage investment to create an attractive and innovative economic environment.





ENERGIES OF TOMORROW —

One mission to help safeguard the future: become the #1 Smart Region in Europe. And one goal: to ensure long-term regional energy independence.

- **Eight related fields:** hydrogen and renewable gas; marine energies (floating offshore wind turbines); renewable energies including solar/photovoltaic; energy storage; retrofitting buildings for better energy performance; smart grids; hydro energy; and nuclear energy
- **A complete and diversified value chain** from energy production to energy storage to smart grids to sustainable consumption, with a scope that also includes the construction sector and technology companies
- **One of three official smart grid territories in France** with the Flexgrid program
- **3700 public and private establishments** involved in the sector, accounting for more than 40 000 jobs
- **Wide-ranging opportunities** with a global market estimated at \$1.4 trillion per year and a potential for job creation in the regional renewable energy sector of 60 000 jobs (FTEs) by 2023, then 126 000 by 2030 and up to 415 000 by 2035



INDUSTRIES OF THE FUTURE —

A common objective: a widespread industrial revival with new projects that foster the development of skills and expertise while embracing social and environmental issues.

- An international ecosystem with **21 000 industrial companies and 155 000 employees** (nearly 10% of total regional jobs)
- **Three key hubs** with high-performance infrastructure and equipment: PIICTO, TEAM Henri-Fabre, and System Factory
- Global champions based in the region: Airbus Helicopters, CMR Group, ENGIE, Safran, Air Liquide, Areva, Dassault, Total, Schneider Electric, Naval Group, CNIM, etc.
- **Révélateur 4.0:** a customized support program for 500 regional industrial companies
- **One dedicated campus** for training in the industries of tomorrow: the Campus des Métiers et des Qualifications Industrie du Futur Henri-Fabre



INNOVATIVE HEALTHCARE —

A project: to create an ecosystem that is a European benchmark for the design and development of the healthcare and therapies of the future.

- A leading international research center: **one of the Top 3 immunology sites in the world**, #1 clinical trial capacity in France
- A world-renowned site of excellence: **the Marseille Immunopole** in Luminy
- Medical therapies: **300 ultra-specialized establishments** located in the region
- High-growth companies: Sartorius, Innate Pharma, Nicox, Sangamo, Virbac, Pfizer, Qiagen, Ipsen, Immunotech, etc.
- **The #1 health cluster in Southern Europe:** a powerful network of 41 000 stakeholders and 170 000 employees (public & private sectors combined)
- **A concentration of academic and industrial excellence** in pharmaceuticals, biotechnologies, MedTech, diagnostics, and health services, which is laying the groundwork for the healthcare of the future



SILVER ECONOMY —

One ambition: to build a flexible, innovative, and welcoming silver region.

- **Five target markets:** i) connected health / eHealth / telemedicine; ii) accident prevention / securing homes; iii) collective, inclusive, and connected housing; iv) senior mobility / mobility of the future; and v) sports, health, and active aging
- **A structured ecosystem:** with specialized centers and clusters (including the Pôle Services à la Personne for home services, Eurobiomed for health innovation, SCS for connected solutions, and Gérontopôle Sud for the science of aging); dynamic companies and world leaders (ADMR, AG2R La Mondiale, Arcade, Bluelinea, Senioriales, Carsat Sud-Est, Exo Stim, Korian, Oui Care, etc.); customized real estate solutions; and a vast talent pool with qualified skills
- **#1 silver region in Europe**
- **Innovation support programs:** competitiveness clusters, R&D centers, promotional campaigns, market access, and shared resources at all stages of projects (from R&D to marketing)
- More than **82 000 jobs**



BLUE ECONOMY —

The environment and international operations: two interconnected dimensions of the maritime and logistics sector.

- With its exceptional seafaring legacy, its rich natural environment, and its renowned industrial history, the region is one of the world's leading stakeholders in the global maritime sector
- **An international ecosystem** with 7000 maritime companies and 126 000 employees (26% of total jobs in the French sector)
- **Seven major projects fast-tracked**, six of which are already operational: System Factory (and the Technopole de la Mer), Floating Offshore Wind Turbines, the PIICTO platform, Port Vauban (Antibes), La Ciotat Shipyards, and the super-yacht facilities in Marseille
- **Révélateur 4.0**: a customized support program for 500 regional industrial companies
- **A Campus des Métiers et des Qualifications** based in Toulon to train people for tomorrow's maritime professions



TOURISM AND CREATIVE INDUSTRIES —

A magnificent resource: creative and sustainable territories with valued heritage, diverse forms of tourism, strong local cultural traditions, and clear links between culture, tourism, and digital technology.

- **Eight major areas of excellence**: wine tourism / major events and business tourism / heritage / museums and art galleries / development of cultural assets / mountain tourism / business and academic tourism / film, image, and content industries
- **Three world-renowned geographic areas**: Provence, the Alps, and the Côte d'Azur
- **Numerous sites and platforms to foster innovation**: film studios such as Victorine Studios in Nice, the Pôle Média Belle de Mai in Marseille, The Bridge for tourism industry support in Arles, Avignon, and Nîmes, the creative technology business district in Cannes, etc.
- **26 innovative projects** providing structure to the ecosystem: demonstrators, high-profile venues, major events, training centers, etc.
- **75 000 establishments and 194 000 employees** in tourism and creative sectors in the Sud region



SMART TECH —

Smart territories of the future: smart systems are laying the groundwork for the economy of tomorrow in the Sud region and are equipped with innovative and cross-disciplinary technologies and services, with a focus on benefiting residents in a "Tech for Good" approach.

- **The infrastructure to meet future challenges together**: high-speed internet, big data and open data, tech for good, artificial intelligence, Internet of Things, contactless technology, etc.
- **Iconic hubs and locations**: including thecamp, Smartseille, the Smart City Innovation Center, smart ports and airports, Nice Méridia, La Coque accelerator, the IMREDD research institute, Accélérateur By TVT Innovation, 3IA artificial intelligence center, etc.
- **Two competitiveness clusters**: Secured Communicating Solutions (global) and Optitec, as well as the Novachim professional network
- **19 innovative projects that provide structure to the ecosystem** demonstrators, high-profile venues, major events, training centers, etc.
- The Nice-Côte d'Azur metro area is ranked in the **Top 5 of the world's smart cities**
- **27 000 companies with 66 500 employees** in the tech and optical sectors



NATURAL LIVING —

The Natural Living sector is focused on five priority markets: quality foods, natural ingredients, nutraceuticals, natural cosmetics & perfumes, organic controls & natural inputs.

- With its **wealth of resources**, its specific agricultural facilities to grow the raw materials needed for finished products, and its one-of-a-kind natural environment, the Sud region's natural living ecosystem guarantees quality, safety and traceability
- **An exceptional network of research and training centers** (Campus 3A, CTCPA, etc.), competitiveness clusters (Innov'Alliance), associations, unions, consular chambers, business groups, etc.
- Highly attractive and internationally **renowned hubs with excellent facilities** and infrastructure that offer all the services and equipment required
- **A leading French region** in terms of organic farming and responsible, sustainable production in relation to both the environment and people
- **More than 12 200 employees in 368 establishments** with celebrated international companies that act as ambassadors for the region, including Arkopharma, Calissons du Roy René, Kopper, Mane, Naturex, L'Occitane-Melvita, and Robertet

2. THE SMART REGION, COMMITTED TO THE FUTURE

With its initiative to build a Smart region, Region Sud is affirming its commitment to developing an intelligent, innovative, and versatile territory that uses digital tools and services to both improve people's daily lives and to respond to the major challenges of tomorrow. The regional policies and the programs being deployed make the Sud region the leading location for experimental projects and innovative services.

Ambitious objectives:

- **A 25% reduction in greenhouse gas emissions** from transportation by 2021
- Become **carbon neutral** by 2050
- Invest massively in **renewable energies**
- Implement **green growth policies**, that will create sustainable jobs
- Develop local supply chains
- Open the Fond RESPIR to **finance environmentally friendly projects**
- Plant one million trees in the Sud region by 2021



SPOTLIGHT ON SOME MAJOR STRUCTURAL PROJECTS IN THE REGIONAL TERRITORY:

- **Flexgrid:** national smart grid program
- **Floating Offshore Wind Turbines:** located off the coast, this technology takes advantage of strong and regular marine winds and frees the renewable energy industry from land-based constraints
- **Hynovar:** green hydrogen mobility project (public transport buses, maritime shuttles, utility vehicles) in the Var department
- **Jupiter 1000:** a project to convert surplus renewable electricity into "green" gas
- **PIICTO:** Mediterranean platform dedicated to excellence in the energy transition (Fos-sur-Mer)
- **SYSTEM FACTORY:** an accelerator for innovative industrial projects that aims to maximize the use of cutting-edge technological tools in the region's industries (Toulon)
- **ITER: the International Thermonuclear Experimental Reactor** is an international nuclear fusion research project located at the Cadarache site

For more information on major structural projects, contact:

 **Gregory VARAGNOL** 

Business Unit Manager for the OIR strategic sector program

 gvaragnol@risingsud.fr

3. FRENCH TECH

French Tech is a unique ecosystem that brings together start-ups, investors, decision-makers, and community builders. The objective is to support members of the network in their development, particularly in terms of international expansion. There are 13 French Tech networks in France, each with its own objectives, programs, and personnel.

In the Sud region, there are four French Tech networks:

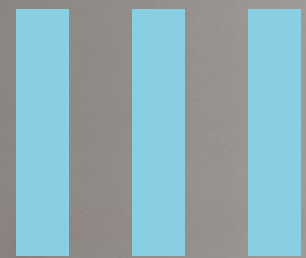
- **two French Tech capitals:** Aix-Marseille and the Côte d'Azur
- **two French Tech hubs:** Toulon and Grande Provence (designated for "Culture")

Members of the French Tech network are linked to multiple key domains: #HealthTech, #Biotech, #MedTech, #Health, #IOT #Manufacturing, #EdTech #Entertainment, #CleanTech, #Mobility, #Security #Privacy, #Sports.



Photo credit: ©Joël Assuied

The national French Tech 120 program is aimed at high-potential French start-ups. It aims to develop global tech leaders through enhanced support from public-sector stakeholders (the French government, the Banque de France, the URSSAF social security network, the French treasury department, etc.).



JOIN A REGION
THAT IS *open*
TO THE WORLD





01

A MELTING POT REGION

**more
than 160**

**nationalities: a strong tradition
of welcoming newcomers**
and a mobile population that is open
to other cultures.

**more than
520 000**

people with immigrant backgrounds
call the Sud region home.

The most represented nationalities, in order,
are **Algerians, Moroccans, Italians, Tunisians,
Spanish, Portuguese, and Turk.**

Sources: ARII policy document; Region Sud; 2019 annual report;
Economic Panorama 2020

02 AN ATTRACTIVE REGION AT THE CROSSROADS OF THE MEDITERRANEAN



Port of Marseille (13)

#7

French region for
external trade

On average

2

incoming investments are finalized
per week in the Sud region

#2

French destination for
international tourists
(after the greater Paris area),
with approximately 34 million
tourists per year

Key numbers

- Exports: **€21.7 billion**
- Imports: **€33.9 billion**

- **More than 2200 companies** with foreign capital (50 000 jobs)

- Main sources of investment: United States, Germany, Italy, United Kingdom, Asia, the Netherlands, Scandinavia, Switzerland, and Belgium

- **327 incoming projects** have located to the region since 2016, resulting in the creation or maintenance of more than 7500 jobs; this makes the Sud Provence-Alpes-Côte d'Azur region one of the most attractive in France

- **€18.6 billion** in revenues, or 13% of GDP

- **141 000 direct jobs**, representing 7.5% of the region's jobs, including 120 000 full-time, permanent jobs

- **25 000 businesses** in sectors related to tourism

03 AN EASILY ACCESSIBLE REGION

The Sud region is a strategic hub for both North-South and East-West routes, and it links both Italy and Spain to the primary French and European markets.



High speed train stations Airports Ports Highway

Bay of Nice (06)

- The region offers the **ideal infrastructure** for investors in industry, shipping, renewable energy, and logistics. **The Port of Marseille Fos**, France's #1 port, is the natural gateway to Europe. It is an ideal solution for access to French, European, African, and Middle Eastern markets. Companies can also rely on the **ports of Nice and Toulon**.



High speed train stations

- **15 high-speed TGV train stations** linking the Sud region to the main French and European cities (Paris is just three hours away by train).
- **Creation of a new Provence-Côte d'Azur line** linking the three main metro areas (Marseille, Toulon, Nice) in order to improve the quality of the rail service and to facilitate travel in the region.

- **Major highway network** with the A7 (running North-South for access to Lyon and Paris); the A8 (running West-East for access to Nice, Italy); and the A9 (running East-West for access to Montpellier, Spain).



Airports

- The Sud region has three international airports: **Nice Côte d'Azur** (direct connections to the USA, China, Russia, and the Gulf states), **Marseille Provence**, and **Toulon Hyères**, which rank respectively as the #1, #3, and #25 airports outside of Paris and together serve more than 160 direct destinations worldwide and had more than 25 million passengers in 2019 (including 62% international).



Ports

- **Port of Marseille Fos**: #1 cruise port in France and more than two million passengers pass through the port each year. Able to receive maritime, logistics, and industrial activities.
- **Toulon**: #1 port for service to Corsica, expanding the capacity to welcome cruise ships and handle bulk & Ro-Ro traffic, providing support for the #1 military port in the Mediterranean
- **Nice-Cannes-Villefranche-Monaco**: 780 912 passengers
- **Antibes**: Europe's largest marina

04 A REGION WITH GLOBALLY RENOWNED TRAINING AND EDUCATION



Key Numbers:

- **More than 18 000 students** enrolled in international, binational, or European sections
- **176 European sections**
- **25 binational sections**
- **37 international sections**
- **26 international schools** for primary and secondary education: 15 in the Alpes-Maritimes, seven in Marseille, three in Avignon, and one in Manosque

RENOWNED INTERNATIONAL SCHOOLS

SPOTLIGHT ON EIPACA (ÉCOLE INTERNATIONALE PROVENCE-ALPES-CÔTE D'AZUR) IN MANOSQUE

Located 20 minutes from the ITER site, the school welcomes the children of employees working on the nuclear fusion reactor project as well as many local students of European and non-European nationalities. **It has a capacity of more than 1000 students.**

The school has an educational system that is unique in Europe. From kindergarten to high school, it offers a curriculum adapted to the diversity of families who wish to send their children there. **It has six language sections in which 50% of the teaching is done in French and 50% in the chosen language** (up to 80% in English for English speakers) and also offers additional courses in other foreign languages.

Students have the opportunity to take **the international option in the baccalaureate** and to take other certifications to attest to the level they have acquired in the language, such as the Diplôme d'Etudes en Langue Française (DELFP) or the British IGCSE (International General Certificate of Secondary Education).

THE CÔTE D'AZUR

The Côte d'Azur offers the **#2 concentration of international schools** (after the Paris region): 18 schools offer bilingual or international courses from kindergarten to high school in **seven different languages**, including schools such as the Centre International de Valbonne, the International School of Nice, and the Mougins School.

The higher education system offers many internationally oriented courses through **international partnerships**, specialized Master's degrees, multidisciplinary programs, and other initiatives.

Renowned language centers offer their services to international students and residents who wish to improve their language skills.

05

A REGION THAT IS HOME TO INTERNATIONAL PROJECTS



Cogedim in Marseille (13)

■ **ITER (International Thermonuclear Experimental Reactor)** in Cadarache is developing a new energy for our future. This fusion program is the result of a worldwide collaboration (35 countries/€20 billion) and aims to achieve a lofty ambition: reproducing the unlimited energy of the sun and the stars here on Earth.

■ **Euroméditerranée** in Marseille is the largest urban renewal operation in Southern Europe and is driving economic, social, and cultural development while increasing the attractiveness and the international influence of the Marseille metro area (more than €10 billion in investments).

■ **Ecovallée Plaine du Var** is one of the largest Operations of Interest to the Nation development projects in France. It is creating a new urban planning model that combines economy and ecology to foster economic growth in the Nice-Côte d'Azur metro area.

■ **Sophia Antipolis** is Europe's leading technopole and is a world reference in innovation and R&D. Every year, more than 1000 new jobs are created at the technopole in key sectors such as artificial intelligence, biotechnology, or self-driving and Smart cars.

■ **De Mayol à Pipady** is a partnership project that will shape the future of the Toulon metro area for the next 50 years. It is both an urban development and restructuring project for a vast area of 44 hectares between land and sea around the Bay of Toulon.

■ **thecamp** in Aix-en-Provence is an innovation campus dedicated to digital transformation, emerging technologies, and new approaches.



ANNEX

**COMPETITIVENESS
CLUSTERS AND OTHER LOCAL
INFRASTRUCTURE**

COMPETITIVENESS CLUSTERS IN THE SUD REGION

The Sud region has an elaborate economic ecosystem that favors the development of projects across its territory and allows for local companies to expand internationally.

Each of the eight competitiveness clusters embodies one of the region's main, high-growth industrial sectors. These sectors account for nearly 1/3 of private jobs in the region, which is 400 000 people either directly or indirectly employed.



AQUA-VALLEY/EA ÉCO ENTREPRISES
(cluster with global connections)
Aix-en-Provence (13)

Four strategic focuses:

- Identification and mobilization of water resources
- Management of resources and use
- Water recycling
- Institutional and societal solutions

www.pole-eau.com

CAPENERGIES
Aix-en-Provence (13)

Three objectives:

- Meet the challenges of the energy transition
- Develop a benchmark energy sector
- Manage industrial research and development projects

www.capenergies.fr

EUROBIOMED – CBS
Marseille (13) - Nice (06)

Innovation at the service of health and life sciences.

www.eurobiomed.org

INNOV'ALLIANCE
(Formerly Terralia-PASS)
Avignon (84) - Grasse (06)

Network for innovation and growth in the agricultural, agri-food, food technology, cosmetics, flavorings, and fragrances sectors in the southeast of France.

www.pole-innovalliance.com

MER MÉDITERRANÉE
(cluster with global connections)
Ollioules (83)

Facilitates the sustainable development of the maritime and coastal economy.

www.polemermediterranee.com

OPTITEC
Marseille (13)

Complex systems for optics, photonics, and image processing.

www.pole-optitec.com

SAFE CLUSTER
Aix-en-Provence (13)

Development of new applications in aerospace (aircraft and embedded systems) and environmental monitoring and risk management systems.

www.safecluster.com

SCS (Secured Communicating Solutions)
Rousset (13) - Sophia Antipolis (06)

ICT (Information and Communication Technologies) applied to optics, electronics, software & telecommunications.

www.pole-scs.org

List in alphabetical order

Land of opportunities

The Sud region is a land of opportunities and it abounds in local infrastructure that contributes to the development of companies in a broad range of key areas (biotechnologies, digital & IT, fashion, culture & tourism, green transition, natural living, immunology, health, blue economy, personal services, communication, agri-food, chemistry & materials, etc.).

You will definitely find the right partner to support you and your project among more than:

16
accelerators

16
clusters

15 
incubators with
ministry certification

More than
30
business start-up facilities