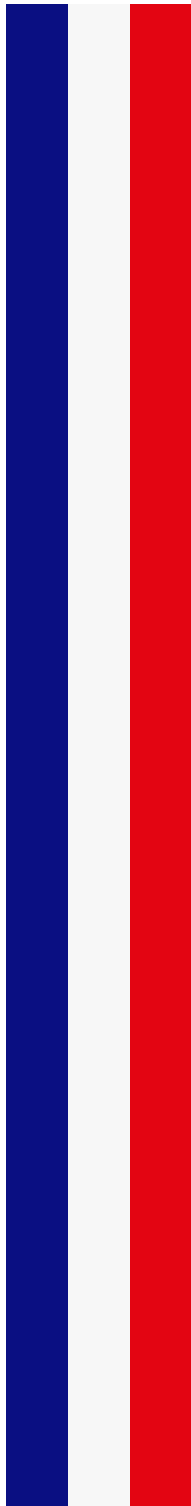




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# MAPPING FRANCE

## THE DYNAMISM OF FRANCE'S REGIONS THROUGH INVESTMENTS BY FRENCH AND FOREIGN COMPANIES

**The diversity of France's regions, coupled with their high-quality infrastructure and workforces, are powerful drivers of their attractiveness to investors.**

The investment decisions confirmed in 2017 generated employment in practically every one. At the same time, the geographical breakdown of projects reflects the attractions of our regions and the fact that the presence of foreign companies frequently draws new foreign investment to the same area. Amid the competition in Europe to attract foreign investment, the thriving economies of France's regions and cities are often a decisive factor.

The following maps highlight the main investments by French or foreign companies, announced or implemented since 2017, which illustrate the economic and industrial dynamism as well as the attractiveness of French territories.

# AUVERGNE-RHÔNE-ALPES

## KEY ECONOMIC DATA

**€250bn** Regional GDP  
**11.4%** Contribution to France's GDP  
**8M** Population

## MAJOR RESEARCH POTENTIAL

As the second most important research region in France and the fifth most important in Europe, with over 600 laboratories and 40,000 researchers, Auvergne-Rhône-Alpes has vibrant innovation ecosystems, interlinked through its 18 clusters, its French Tech cities and its competitiveness hubs.

Lyonbiopôle is a global bio-cluster focusing on pharmaceuticals, particularly for cancer and human and animal infectious diseases (global centre of excellence for vaccines and diagnosis).

## A VIBRANT INDUSTRIAL REGION

Auvergne-Rhône-Alpes has become established as France's second most important economic region and Europe's fifth most important region in terms of wealth creation. It produces 11.4% of national wealth, and its GDP is equivalent to that of Finland. Manufacturing accounts for 18.3% of the region's value added and provides employment for 500,000 people.

The region has a strong and diversified manufacturing base, distinguished by both high-tech industries (development of electronics/digital technology, energy and biotechnology) and well-established traditional sectors (**mechanical engineering, plastics, chemicals, textiles**) that have adjusted to change to remain competitive.

The region boasts 260 big businesses, 2,500 mid-tier companies and 21,000 SMEs.

## A REGION OPEN TO INTERNATIONAL TRADE

Sharing a border with Switzerland and Italy, Auvergne-Rhône-Alpes is strategically placed on main French and European transport routes, making it France's second most important region for imports and exports (app. €60bn of exports annually).

This openness to international markets has led to the setting-up of 4,400 establishments with foreign capital (representing some 3,000 foreign businesses in manufacturing or manufacturing services), and over 700 subsidiaries, joint ventures or trade offices abroad

## FOREIGN INVESTMENT

Auvergne-Rhône-Alpes is the second most important host region for foreign investment projects in France: 154 projects were decided on in 2017, enabling 4,373 jobs to be created or saved.

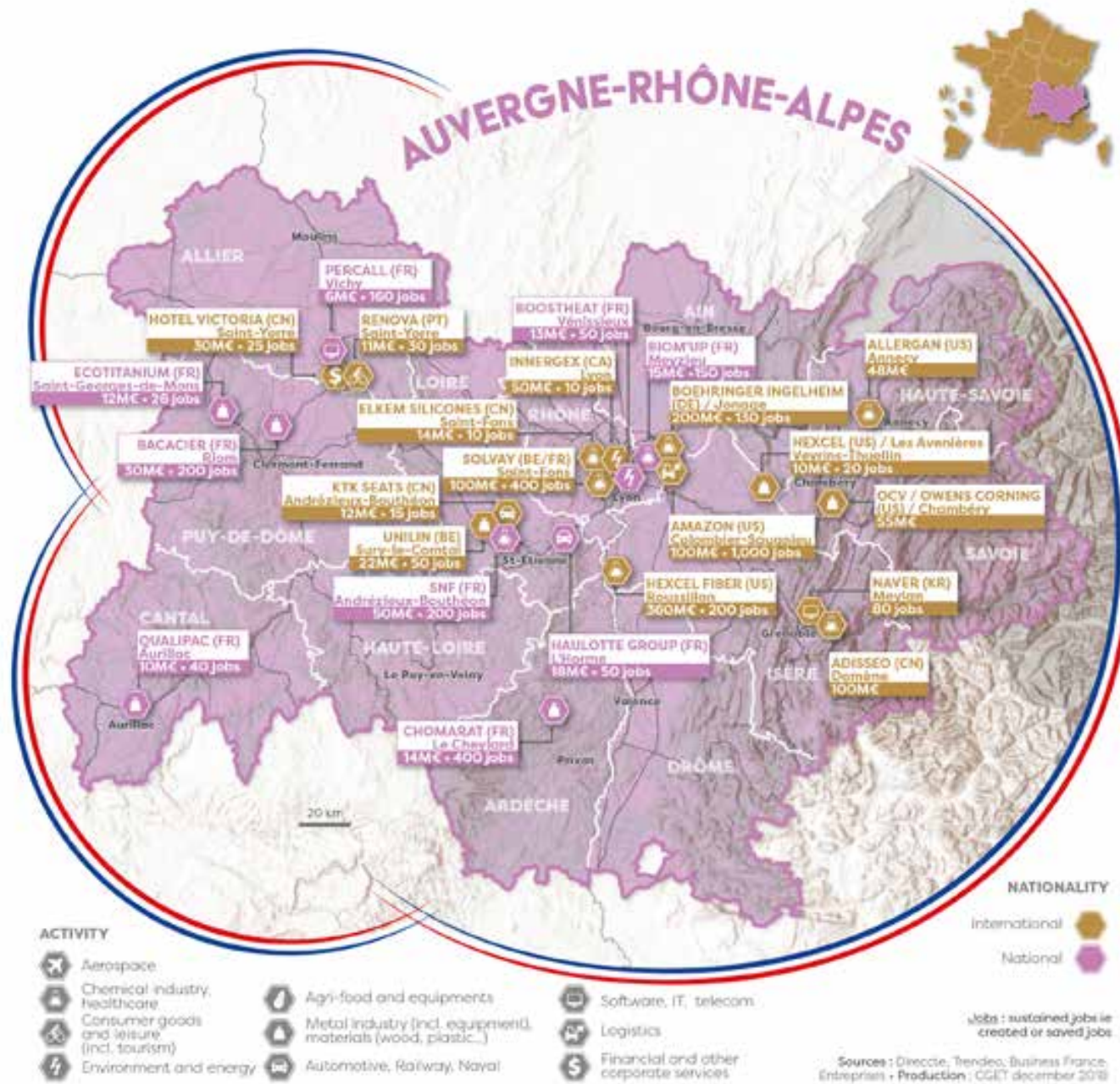
Following its takeover of the French firm Merial in 2017, the German pharmaceuticals group Boehringer-Ingelheim has invested €70m in construction of a new headquarters in the Lyon-Gerland biodistrict for its Animal Health France division. In July 2018 the group also announced that it would be setting up an organic production site for foot-and-mouth disease vaccines in Saint-Priest (Rhône département) with an investment of €200m and the creation of 150 jobs.

In June 2017 Naver, a Korean group, bought its European artificial-intelligence research centre in Grenoble from Xerox, taking over its 80 researchers and employees. Naver is intending to develop applications such as driverless cars, 3D mapping, robotics and voice assistants.

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# BOURGOGNE-FRANCHE-COMTÉ

## KEY ECONOMIC DATA

**€73bn** Regional GDP  
**3.4%** Contribution to France's GDP  
**2.8M** Population

## A REGION WITH A WEALTH OF REMARKABLE NATURAL, CULTURAL AND ARCHITECTURAL HERITAGE

Bourgogne-Franche-Comté has a number of UNESCO World Heritage sites (Cistercian Abbey of Fontenay; Vézelay, Church and Hill; the citadel of Besançon; Cité Internationale de la Gastronomie et du Vin; the Climats, terroirs of Burgundy; the great saltworks of Salins-les-Bains and the royal saltworks of Arc-et-Senans).

It has top-level expertise in luxury products (clocks and watches, jewellery, eyewear and leather goods) and gastronomy (30 Michelin-starred restaurants, 153 products with registered designation of origin, the Cité Internationale de la Gastronomie et du Vin).

The region boasts internationally renowned fine wines, including 33 'grands crus' (Aloxe-Corton, Chablis, Gevrey-Chambertin, Ladoix-Serrigny, Montrachet, Romanée-Conti, Vosne-Romanée, etc.).

## MAJOR MANUFACTURING REGION

Bourgogne-Franche-Comté is a region with a tradition of manufacturing: one employee in five works in manufacturing, and the region has 14,700 industrial plants.

**Mechanical engineering and metalworking:** Proven expertise in machining, mechanical engineering and boilermaking, inherited from the royal foundries and now oriented towards the industries of the future, offering investors state-of-the-art manufacturing solutions. The presence of groups such as Aerospace, Alstom, Vallourec, Aperam Stainless and General Electric bears witness to this high-quality ecosystem, especially for metal processing.

**Car-making:** The region is one of the leading car-making areas in France. With its historic site in Sochaux, PSA Peugeot Citroën has become the second largest car manufacturer in Europe.

**Farming and agri-food:** As a result of its farming (France's second most important farming region for creation of value added; 63% of the regional area is eligible for quality certification), Bourgogne-Franche-Comté has established a major agri-food industry (dairy products, beef, wine, cereals, beverages and spirits).

**Healthcare industries:** Home to flagship pharmaceutical companies (Groupe Uργο, Vétoquinol, etc.) for over a century, with a web of SMEs often having a background in microtechnology and specialising in design of medical devices and subassemblies (Micro-Méga, Proteor, Statice, etc.), Bourgogne-Franche-Comté has historic ties with the healthcare field and a dense ecosystem to support research and innovation.

**Together with 12,160 people employed in R&D**, 14 global research centres working closely with business and research laboratories, 11 technology platforms, a number of engineering schools and clusters, and three French Tech cities (Dijon, Besançon and Chalon-sur-Saône), the region boasts a number of competitiveness clusters, including Vitagora (healthy, tasty and sustainable food), Pôle Véhicule du Futur, Plastipolis (plastics) and Nuclear Valley.

## FOREIGN INVESTMENT

Bourgogne-Franche-Comté welcomed 49 foreign investment projects in 2017, enabling 1,358 jobs to be created or saved.

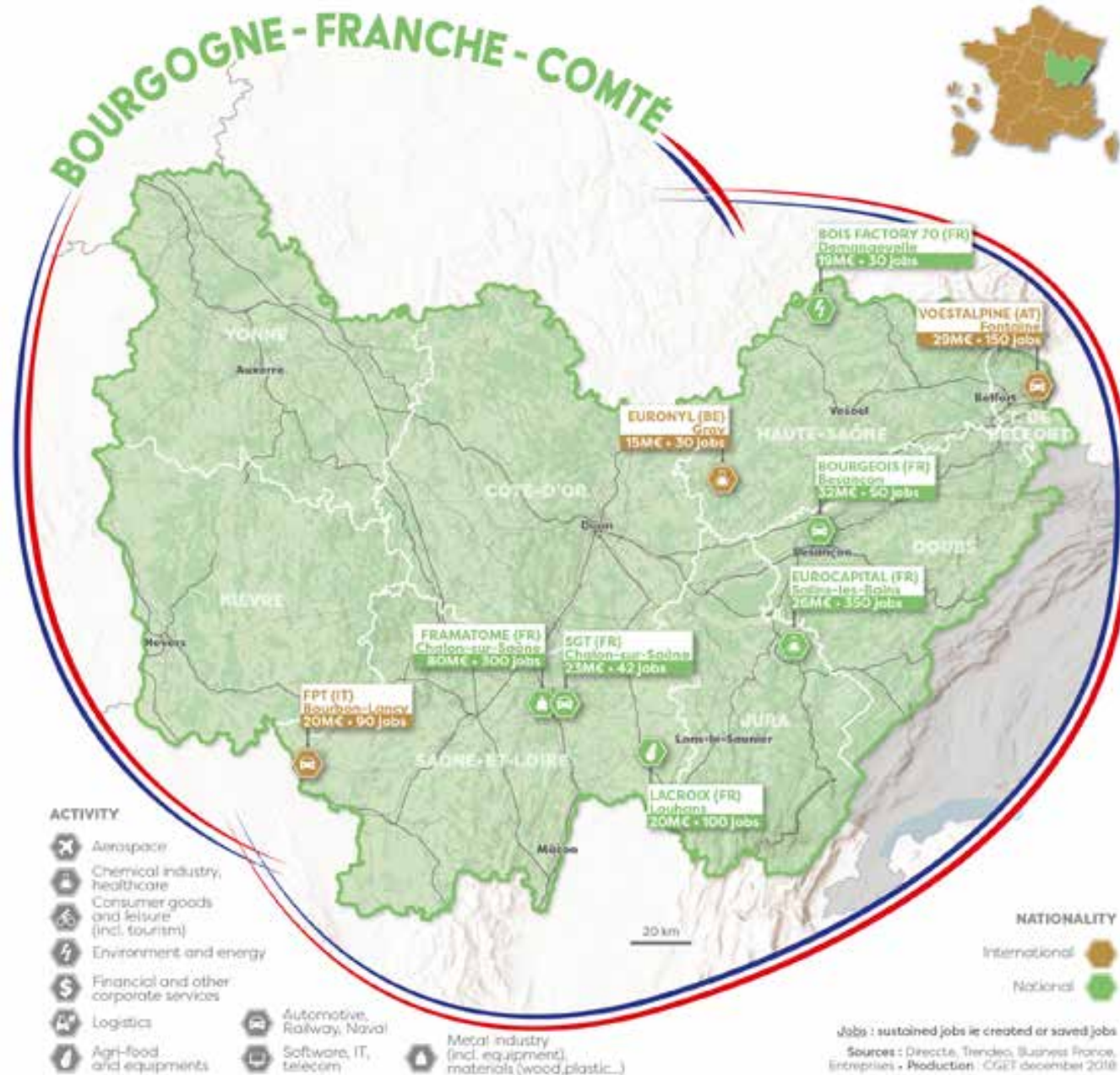
Aperam – a Luxembourg stainless-steel company – has invested €28m in its Gueugnon production site to improve its manufacturing facilities.

The Belgian company Euronyl, the majority owner of Plastigray, a plastics injection moulding firm, has announced a €15m investment and the creation of 30 jobs at its site in Gray (Haute-Saône département).

## CONTACT

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# BRITTANY

## KEY ECONOMIC DATA

**€89bn** Regional GDP  
**4.2%** Contribution to France's GDP  
**3.3M** Population

## TOURISM A MAJOR BUSINESS WITH A REMARKABLE COASTLINE

Brittany is the fifth most popular tourist destination, and its remarkable coastline moves it to second place for seaside holidays, attracting 2.8 million tourists. Tourism generates 57,600 jobs and some 8% of the region's GDP.

## SUCCESSFUL AND DIVERSIFIED MANUFACTURING

An innovative maritime region in the west of France, whose capital (Rennes) is only 1 hour 25 minutes from Paris by high-speed train (TGV), Brittany – with its pleasant environment – offers many advantages, including a vibrant economy and a significant R&D and innovation environment in the European context (competitiveness clusters, 16 innovation centres and a network of 7 technology hubs).

Manufacturing in Brittany – which accounts for 16% of the region's produced wealth – has grown up around a number of key sectors: agri-food, telecommunications, car-making, shipbuilding and (more recently) digital technology.

Historically a farming and fishing region, Brittany has developed a strong ecosystem for the agri-food industry, covering some 70,000 jobs and a third of the region's businesses. It has become established as a leading region for health and nutrition.

**Telecommunications and electronics:** With Brittany being the second most important telecommunications centre in France and the fifth most important region for electronics, Breton manufacturing has built a global reputation in these fields through the establishment of research centres, French and international industrial groups and numerous SMEs.

**Digital technology:** With its highly specialised training facilities, Brittany is a digital technology hub (photonics, big data, Internet of Things, augmented reality) and has become one of Europe's benchmark regions for cybersecurity. It is home to an ecosystem of world-renowned businesses, research teams for top institutions, cyber teams from the French Ministry of Defence and many high-tech SMEs and contractors. It also welcomes investors in digital technology, particularly through its 'image and network' and TES clusters (photonics, big data, Internet of Things and cybersecurity).

**Car-making:** With 250 companies mustering 17,000 jobs, Brittany is harnessing its expertise and production capacity to carbon-free mobility: electric vehicles, intelligent transport and autonomous transport.

**Shipbuilding:** As the fourth most important industry in Brittany, shipbuilding is booming: it covers civil and military shipbuilding and ship-repair yards for fishing, yachting, oceanography and passenger transport.

## LEADING REGION FOR MARINE SCIENCE AND TECHNOLOGY

Brittany is firmly committed to the development of marine renewable energy (MRE), biotechnology and eco-industry. With 36 research teams, the region is host to France Energies Marines, an energy transition institute of excellence, and has become established as a trailblazer for marine science and technology.

## FOREIGN INVESTMENT

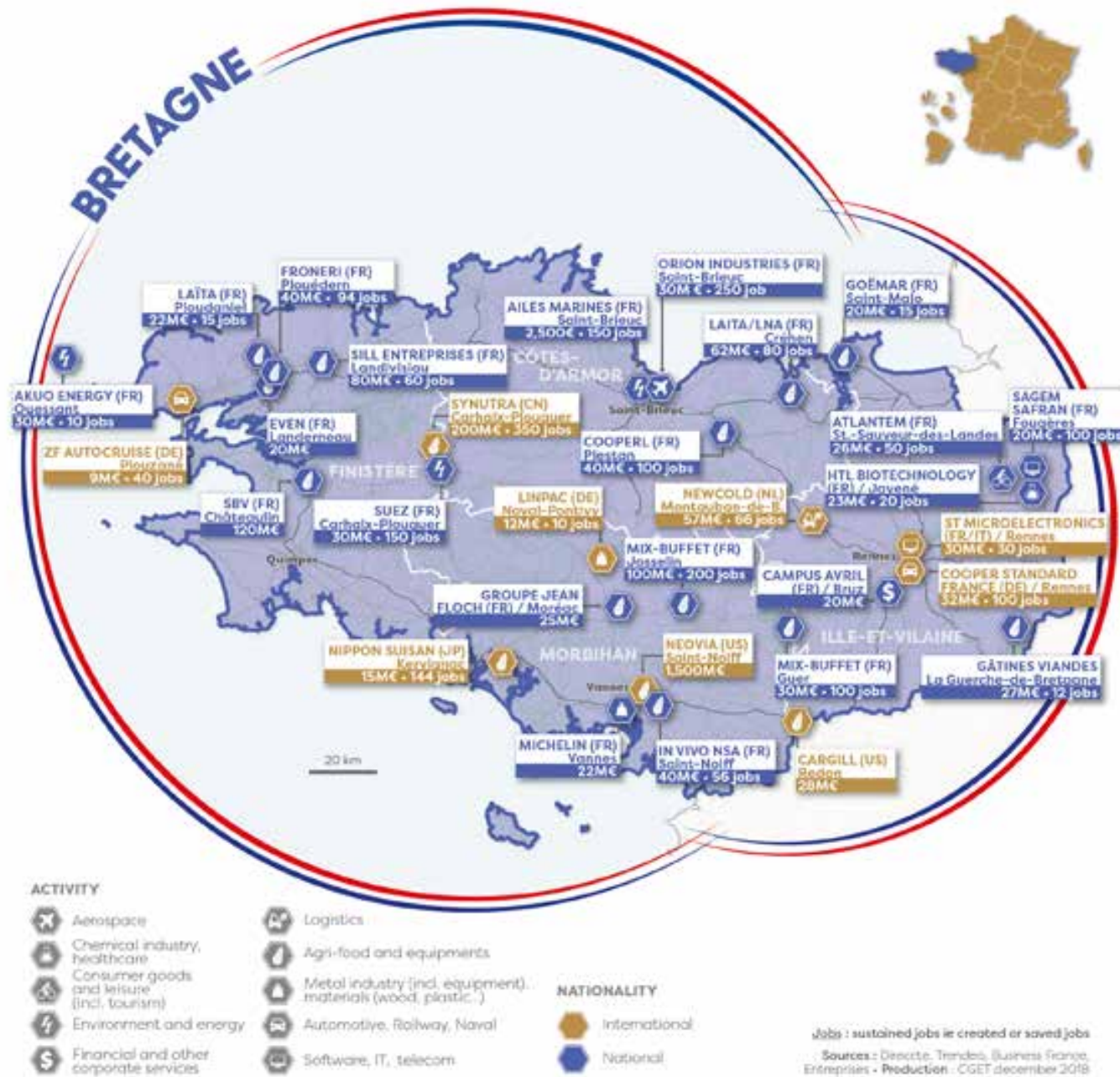
Brittany welcomed 30 foreign investment projects in 2017, enabling 780 jobs to be created or saved.

In 2017 **Nippon Suisan** enlarged its Kervignac plant in Brittany, building a new production unit. The project involved creating some 150 new jobs with an investment of €15m.

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# CENTRE-VAL DE LOIRE

## KEY ECONOMIC DATA

**€69bn** Regional GDP  
**3.2%** Contribution to France's GDP  
**2.6M** Population

## A PRIME TOURIST DESTINATION

With its 2,500 listed monuments, Centre-Val de Loire attracts 9 million visitors annually thanks to its wealth of unspoilt landscapes (Val de Loire, Sologne, Perche, Berry), two of the most visited châteaux in France (Chambord and Chenonceaux), its wine heritage (third most important wine-growing region in France) and its recreational and nature destinations (Beauval Zoo, Center Parcs holiday village, Loire à Vélo cycle route).

## IDEALLY PLACED IN THE HEART OF FRANCE AND THE EUROPEAN MARKET

On the capital's southern doorstep (one hour from Paris by motorway or high-speed train, TGV), Centre-Val de Loire is ideally placed logistically to serve the country as a whole and offers access to a large pool of consumers (25 million in a two-hour radius) and to key economic hubs in Europe.

Logistics is a distinguishing feature of the region (ranking it fourth nationally in terms of labour force) owing to its excellent geographical position and extensive infrastructure (motorways, rail and air freight, distribution centres).

## NOTEWORTHY INVESTMENTS

Centre-Val de Loire welcomed 27 projects in 2017, enabling 596 jobs to be created or saved.

The German company B. Braun – the leading employer for medical devices in France – has invested €60m to ensure the long-term future of three of its five production sites (mainly that of Nogent-le-Retrou).

In 2018 Merck KGaA (Germany) announced an investment of €19m to increase capacity at its Semoy factory (Loiret département), which specialises in manufacturing and packing oral antidiabetic agents.

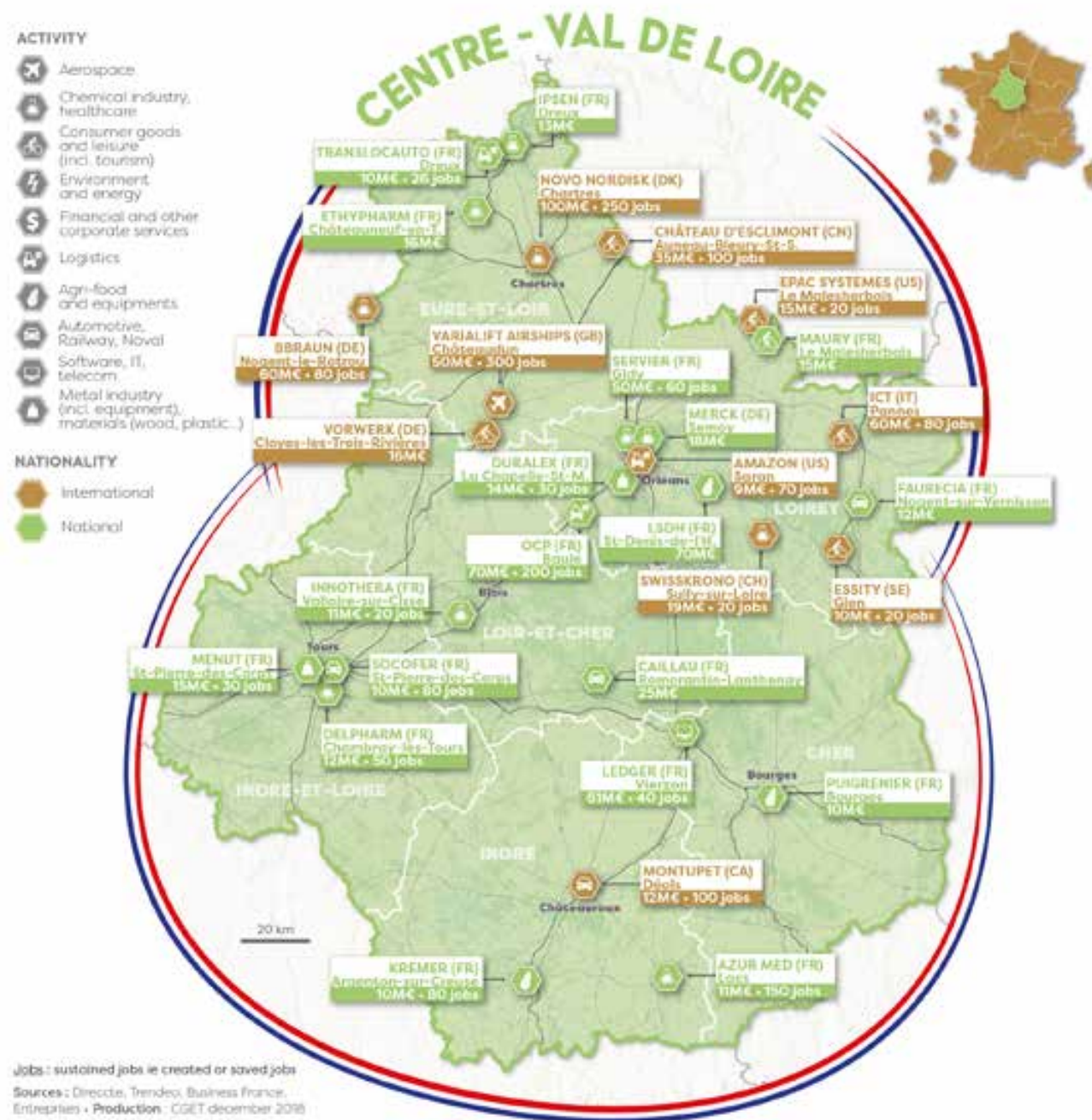
## A WIDE RANGE OF MANUFACTURING WITH A NUMBER OF LEADING INDUSTRIES

With manufacturing accounting for 19.3% of the region's value added, Centre-Val de Loire is a firmly industrial area. It has become established as one of France's leading regions in a number of industries: **perfumes and cosmetics** (Christian Dior, Shiseido, Procter & Gamble, Gemey-Maybelline and Guerlain, for example), **pharmaceuticals** (France's leading region in this sector and ranking third for pharmaceutical exports), **aerospace subcontracting, packaging and plastics processing, and mechanical rubber goods.**

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## CUTTING-EDGE R&D FOR HELPING BUSINESS TO DRIVE ITS INNOVATION PROJECTS

The region has a dense R&D network with 64 public research units, a number of which are globally recognised (INSERM (medical), INRA (agronomy), CNRS (energetics, electronics), BRGM (geology)), a vibrant private research sector (75% of total R&D spending), and competitiveness and other clusters.

The main industries are organised in competitiveness clusters: Cosmetic Valley (leading global resource centre for cosmetics: Chartres); S2E2 (smart energy: Tours); Elastopole (rubber and polymers: Orleans) and the Water Cluster (Orleans).



# GRAND EST

## KEY ECONOMIC DATA

**€150bn** Regional GDP  
**7%** Contribution to France's GDP  
**5.5M** Population

## A REGION FULLY COMMITTED TO THE INDUSTRIES OF THE FUTURE

With 11,500 researchers and over 50 technology transfer and innovation bodies, Grand Est has an ecosystem abounding in players in recognised fields: healthcare, mobility, ecological transition, the bio-economy and materials. It has become established as the fourth most important region in France for European patent applications and boasts a number of competitiveness clusters, including IAR (industry and agricultural resources, bio-economy), Véhicule du Futur (cars) and Alsace BioValley (healthcare, biotechnology)..

## AN EXPORTING REGION LOOKING TOWARDS EUROPE

The region is at the heart of Europe, since it is home to the European Parliament building in Strasbourg.

Grand Est shares 800 km of border with four countries (Belgium, Luxembourg, Germany and Switzerland) and has attractive urban centres only 45 minutes from Paris. This gives the region an unrivalled position in Europe and helps to buoy its international trade. With over 12% of national trade and three quarters of EU trade (including 30% with Germany), it has become established as a top-tier exporting region and a logistics hub of choice for investors.

## NOTEWORTHY INVESTMENTS

Grand Est, which hosted the first regional Choose France summit (Choose Grand Est) in November 2018, ranks as the fourth host region for foreign investment projects: in 2017 it welcomed 131 projects, enabling 3,390 jobs to be created or saved and leading to a number of major manufacturing decisions in 2018.

Daimler has spent €500m on developing its 70,000 m<sup>2</sup> Smart factory in Hambach to prepare for the transition from combustion to electric by 2020 and produce the new Mercedes electric SUV.

Garnica, a Spanish group that is a leading plywood manufacturer on the European market, is investing €45m in Troyes to set up a plywood factory that will employ 120 people in three years' time.

In Moselle, Knauf Insulation is investing €110m to set up a plant in Illange to produce stone wool (100,000 tonnes a year) for the West European market (50% France, 40% Germany and 10% Benelux).

## A STRONG REGIONAL MANUFACTURING BASE

The region's manufacturing strength is apparent in several highly specialised sectors: **metalworking and manufacturing machinery and equipment, the chemicals industry, the wood industry and the agri-food industry.** They account for a fifth of the region's value added and 16% of its jobs.

The European Commission has recognised Grand Est as one of the ten leading industrial transition regions. The region is pursuing a strategy heavily geared towards the bio-economy, drawing on highly developed manufacturing facilities and expertise for production of bio-based materials and molecules from agricultural biomass and forest resources, and based on a Bio-Pact signed with the Hauts-de-France and Ile-de-France regions.

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## KEY ECONOMIC DATA

**€154bn** Regional GDP  
**7.2%** Contribution to France's GDP  
**6M** Population

Competitiveness clusters have grown up in seven fields: transport (i-TRANS), retailing (PICOM), nutrition and health (NSL), consumer goods (Euramaterials), seafood (Aquimer), agricultural resources (IAR) and eco-business (Team<sup>2</sup>).

## FOREIGN INVESTMENT

Direct access to a global environment has facilitated establishment of some 2,000 foreign businesses. Hauts-de-France is the fourth most important exporting region in France and is regularly ranked second (in terms of jobs) for foreign investment projects in France, behind Ile-de-France.

The Japanese group Kubota has chosen Crépy-en-Valois for its tractor R&D centre, which will employ a hundred or so engineers and technicians in three years' time.

In 2018 the British pharmaceuticals group AstraZeneca invested €135m in its Dunkirk site producing inhalers for asthma and bronchial pneumonia.

Booking.com, the leading online hotel booking website, which has been in Tourcoing since 2011, is going to move to a new building in order to accommodate its future employees. This US company (part of the Priceline group) currently employs 430 people in Tourcoing, a figure that will rise to 600 in three years' time.

IBM France has set up in Lille on a long-term basis with the opening of its French security operations centre (SOC). The Lille SOC will be working with French customers (partnership with Auchan group), including those abroad, for crisis rooms, badge and biometric access, data isolation for essential operators, and UPS or generator power protection. IBM will employ a hundred or so IT attack detection specialists and analysts.

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## A FRENCH REGION AT THE HEART OF EUROPE'S LARGEST CONSUMER MARKETPLACE

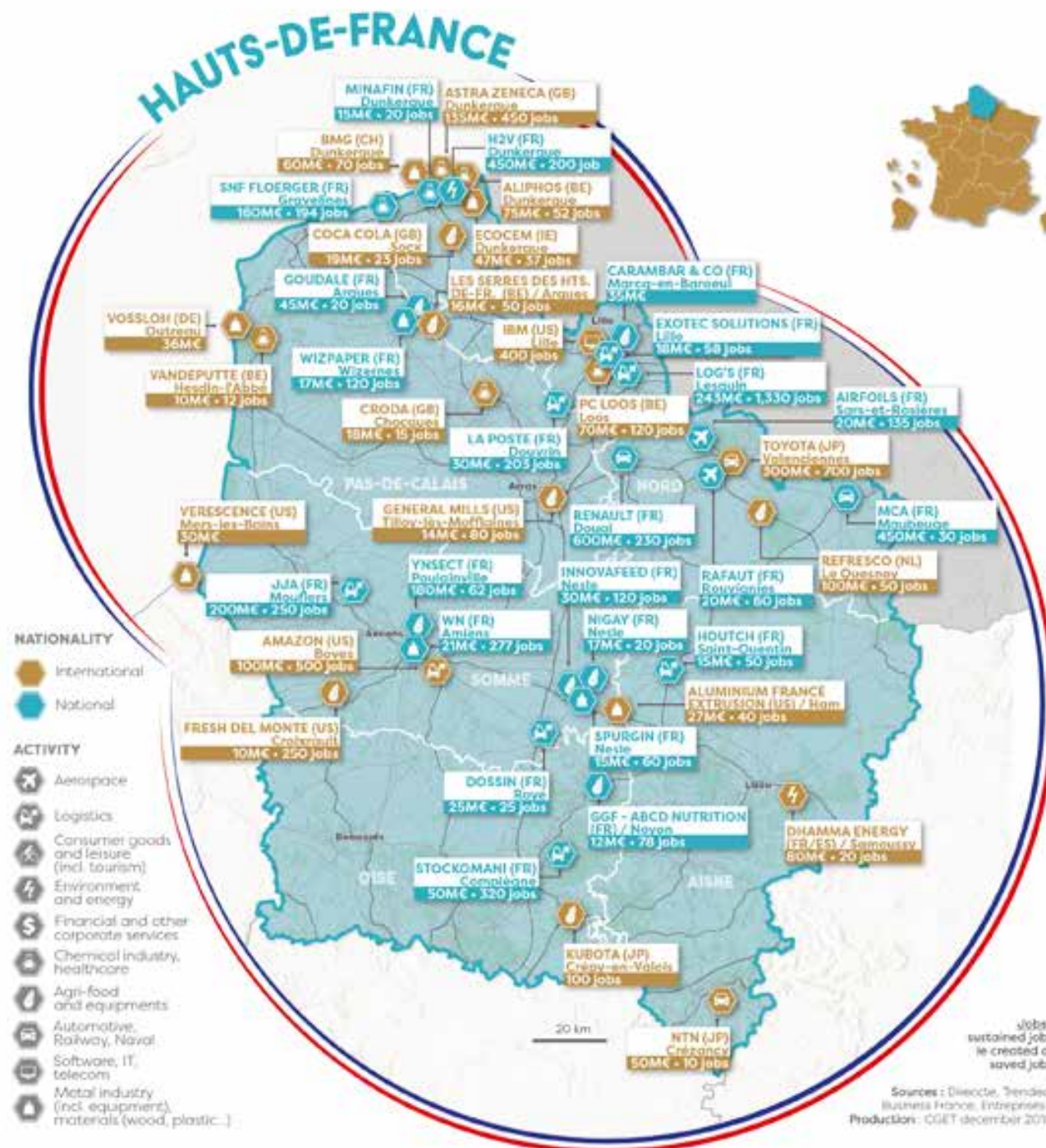
Hauts-de-France has an outstanding coastline of more than 190 km. Its extensive transport network connects with this wide seaboard through three major ports: Dunkirk (national port for rail freight), Boulogne-sur-Mer (fishing and seafood processing) and Calais (national passenger port). The opening of the Seine-Nord Europe Canal by 2022 will link the Paris area and the port of Le Havre to the whole of the north European system. This advantageous geography means that the region is able to attract a large number of logistics firms.

## A MANUFACTURING AREA

Manufacturing accounts for 16.7% of the region's value added and provides employment for 17% of the Hauts-de-France labour force. The region is firmly established in various fields, through major international groups and a dense web of SMEs: it ranks first for **railway rolling stock** (Alstom, Bombardier) and manufacturing hollow glassware (Arc International, Saverglass), second for **textiles, steel production** (Arcelor Mittal), **building construction and support activities** (call centres), and first for the **car industry** (Renault, PSA, Toyota, Sevelnord, Valeo). Hauts-de-France also enjoys a leading position in the **agri-food industry** (1,400 establishments), geared heavily towards export, with, amongst other things, vegetable packing.

## TRANSITION TO GROWTH SECTORS AND HIGH-TECH FIELDS

Hauts-de-France is developing research into use of bio-based molecules in the plant-derived chemistry sector. Traditional industries – cars, textiles, agri-food, chemicals – have started to change though high value-added innovation. New growth drivers are emerging in biology, healthcare, digital technology and the environmental industries.





# ILE-DE-FRANCE

## KEY ECONOMIC DATA

**€650bn** Regional GDP  
**30.4%** Contribution to France's GDP  
**12M** Population

## THE WORLD'S LEADING TOURIST DESTINATION

As the world's leading tourist destination, Ile-de-France receives 49 million tourists a year. The region contains the French capital and is supported by business tourism (Nine million visitors to the region's 440 trade fairs and 1,110 congresses), its abundance of remarkable heritage and its outstanding cultural offering: 4,000 historical monuments, 140 museums, 700 theatres and cinemas and five opera houses. Its cultural and tourist sites are known throughout the world: Disneyland® Paris, Notre Dame, the Sacré Cœur, the Louvre Museum, the Eiffel Tower and the Palace of Versailles.

## EUROPE'S LEADING BUSINESS REGION

Ile-de-France is the prime business region in Europe and one of the most important in the world. By itself it accounts for 4.5% of European GDP. It is distinguished by a highly concentrated productive system, with 1,055,000 businesses, and is home to almost two thirds of headquarters of French businesses employing over 2,000 people. It has the greatest amount of corporate real estate in Europe.

It is the largest employment area in Europe, with six million jobs and a highly skilled labour force (35% of French executives).

Paris is the largest EU stock market in terms of capitalisation, trading and number of listings and Europe's leading bond market. France leads the asset management industry in continental Europe (ranking second in Europe as a whole), and on this market Paris has an asset management ecosystem unrivalled in Europe. Over 600 specialist companies are established there, and four French firms number among the world's twenty leading asset managers. Paris has the largest concentration of foreign banks and financial institutions in Europe.

## A FUTURE-ORIENTED GLOBAL MEGALOPOLIS

Ile-de-France has the global ambition of becoming a megalopolis driving future innovation and promoting major international events. By doubling the size of the Paris metro system, the Grand Paris Express – the largest infrastructure project in Europe – will take the region into this new dimension. Paris will also be hosting the 2024 Olympic Games, which will generate major infrastructure and construction projects.

## LEADING REGION FOR FOREIGN INVESTMENT

Ile-de-France receives 27% of foreign investment in France. The region boasts a large number of decision-making centres. In 2017, 414 investment projects were decided on, enabling 7,649 jobs to be created or saved.

Fujitsu announced in 2017 that it was expanding its AI research capacity in France with an extension of its Paris-Saclay premises and further recruitment (€50m investment). Fujitsu has also been selected to take part in a European Union AI research programme.

## A KEY REGION FOR RESEARCH AND INNOVATION

Ile-de-France is Europe's leading R&D region with overall R&D spending equivalent to that of Silicon Valley. Research and development provides employment for 162,000 people in global R&D centres and in the many businesses at the forefront of global innovation. This global appeal is underpinned by internationally recognised hubs such as Grand Roissy, La Défense and Paris-Saclay. Ile-de-France currently has a number of competitiveness clusters operating in its area, covering over 4,300 members, including more than 3,600 businesses. The region also has an extremely dense innovation ecosystem, with over a hundred incubators and accelerators to support the growth of entrepreneurial projects. The opening of Station F, the world's largest incubator, in 2017 is part of this process, bringing together thousands of creators, partners, investors and talents in one spot.





# NORMANDY

## KEY ECONOMIC DATA

**€90bn** Regional GDP  
**4.2%** Contribution to France's GDP  
**3.3M** Population

## A FOCAL POINT FOR EUROPEAN MARKETS AND FOREIGN INVESTMENT

With the Haropa port system in Le Havre and its strategic location near Paris, Normandy is a gateway not only to a market of 200 million potential consumers but also to all international markets.

Normandy benefitted from 34 foreign investment projects in 2017, which created or saved 2,179 jobs.

LM Wind Power, a wind turbine blade manufacturer that was acquired by General Electric in 2017, confirmed that it will build a €120m production plant in Cherbourg, which is expected to create 550 jobs.

In 2018, GlaxoSmithKline announced that it will invest €90m in its Evreux site to manufacture the Ellipta, a new type of dry-powder inhaler that the company has developed.

## STRONG INDUSTRIAL POTENTIAL

Industry accounts for 20.3% of the region's value added and 23% of jobs, making Normandy a significant industrial region. It is the location of many large companies, including the two largest French refineries (Total and Exxon Mobil), three nuclear power plants (Paluel, Penly and Flamanville) as well as the La Hague nuclear fuel reprocessing site and major plants for the automotive (Renault) and aeronautics (Snecma, Thales Aerospace) sectors.

Normandy generates nearly 15% of French electricity and is the country's flagship region for marine renewable energy.

Four clusters, TES, Hippolia, Mov'eo and Nov@log, are Normandy-based.

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## VARIED AND ABUNDANT AGRICULTURE AND FISHING

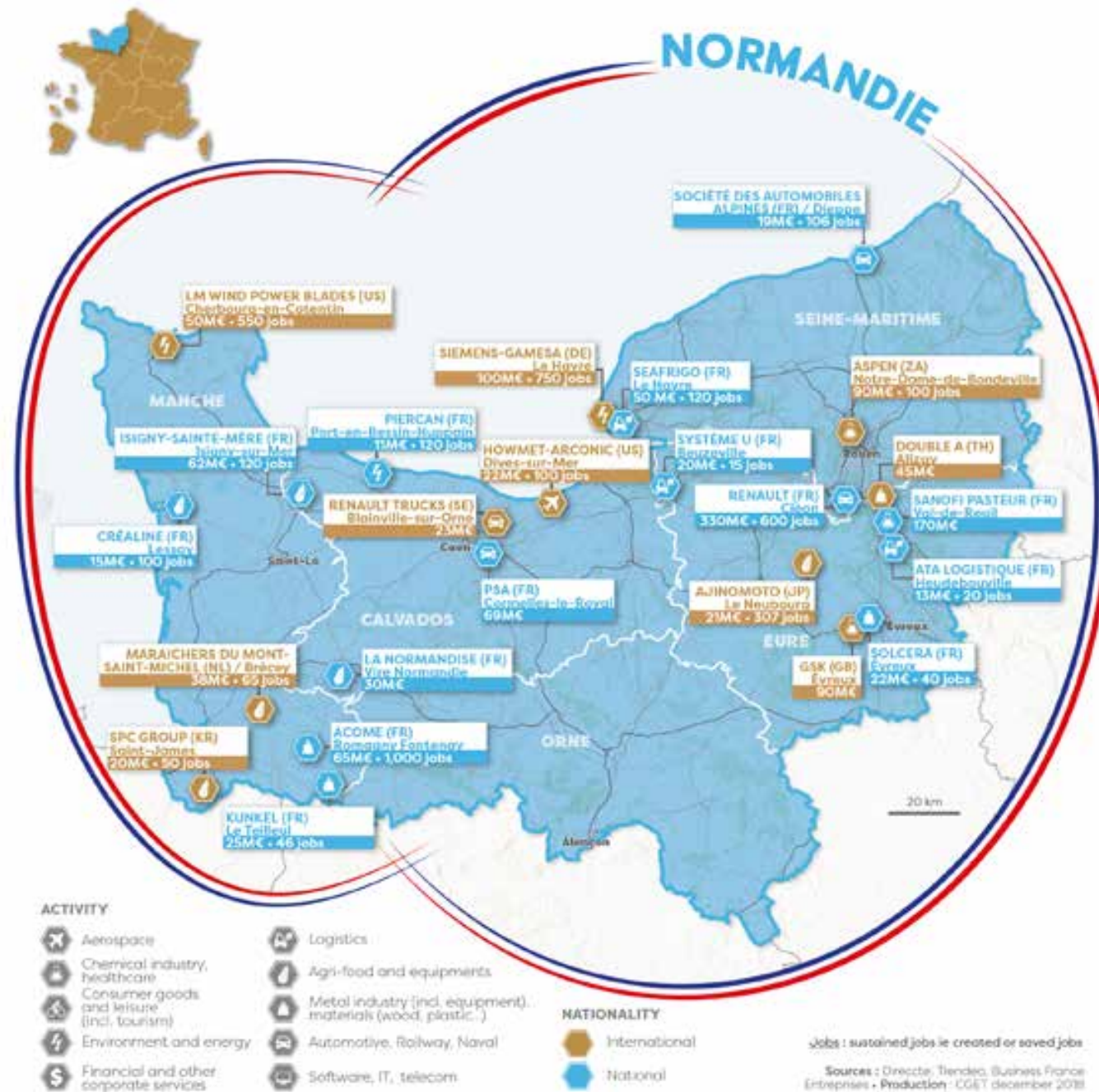
Normandy is a bountiful agricultural region where livestock and farming zones coexist. With 600 km of coastline, the region has extensive fishing grounds. It is also home to one of the largest oyster- and mussel-farming catchment areas. As France's top cheese-producing region, Normandy is well-known for its many Protected Designations of Origin (PDO).

## 18 MILLION VISITORS EACH YEAR

Normandy is a favourite destination for green tourism, thanks to the quality of its natural spaces. Tourists can enjoy unspoiled seaside getaways in a variety of forms.

The region boasts several sites on UNESCO's World Heritage List. With 2.5 million visitors annually, Mont-Saint-Michel and its bay are among the most-visited tourist sites in France. There is also the Le Havre city centre, which was rebuilt by Auguste Perret, the Vauban observatory towers in Tahihou and La Hougue, and the Bayeux Tapestry, which has been included in UNESCO's Memory of the World Register.

Remembrance tourism enjoys a special status in Normandy, with the D-Day landing beaches and many locations focusing on the Second World War (the Caen Memorial Museum in particular).





# NOUVELLE-AQUITAINE

## KEY ECONOMIC DATA

**€160bn** Regional GDP  
**7.5%** Contribution to France's GDP  
**5.8M** Population

number of investors. High-powered ecosystems help buoy the region's cities: ceramic materials in Limoges, insurtech in Niort, oil and gas in Pau, sailing in La Rochelle, EdTech in Poitiers, surfing in Bayonne and graphic novels in Angouleme.

## 27 MILLION TOURISTS PER YEAR – ONE OF FRANCE'S MOST-VISITED REGIONS

With its 720 km of shoreline, Nouvelle-Aquitaine is the second most-visited region in France. Visitors have a vast number of tourist destinations to choose from, set in a variety of landscapes (Bordeaux, the Dune of Pilat, Biarritz, the Arcachon basin, and more).

## FOREIGN INVESTMENT

Nouvelle-Aquitaine is home to more than 1,300 foreign companies, which employ more than 55,000 people.

New Aquitaine is the fifth-largest region in terms of foreign investment: 97 FDI projects were finalised in 2017, creating or saving 1,701 jobs.

In 2017, the Swiss company Sophia Genetics – which was ranked among the 50 most intelligent companies in the world by MIT – set up its R&D centre in the Izarbel technology park in Bidart (Pyrénées-Atlantiques département) with 50 jobs planned. Sophia Genetics, the global leader in data-driven medicine, specialises in bioinformatics in oncology and genetic illnesses. Since moving to the region, it has announced the opening of a second R&D centre in Bordeaux, where it plans to create 30 jobs.

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## A MAJOR INDUSTRIAL REGION

Nouvelle-Aquitaine is France's largest region by surface area, and the third largest economic region by GDP. It is home to four major industrial sectors.

As Europe's leading agricultural region – the second-largest in terms of the number of organic farms – Nouvelle-Aquitaine boasts a large and diverse **agri-food industry**: arable crops in Aquitaine and Poitou-Charentes, wine-growing with the vineyards in Bordeaux and Cognac, livestock (meat and dairy) in Limousin and Pyrénées-Atlantiques.

**Aerospace and defence** have an established presence in southwest France, with strong impetus provided by the Aerospace Valley cluster. Bordeaux is a European aeronautics decision-making centre.

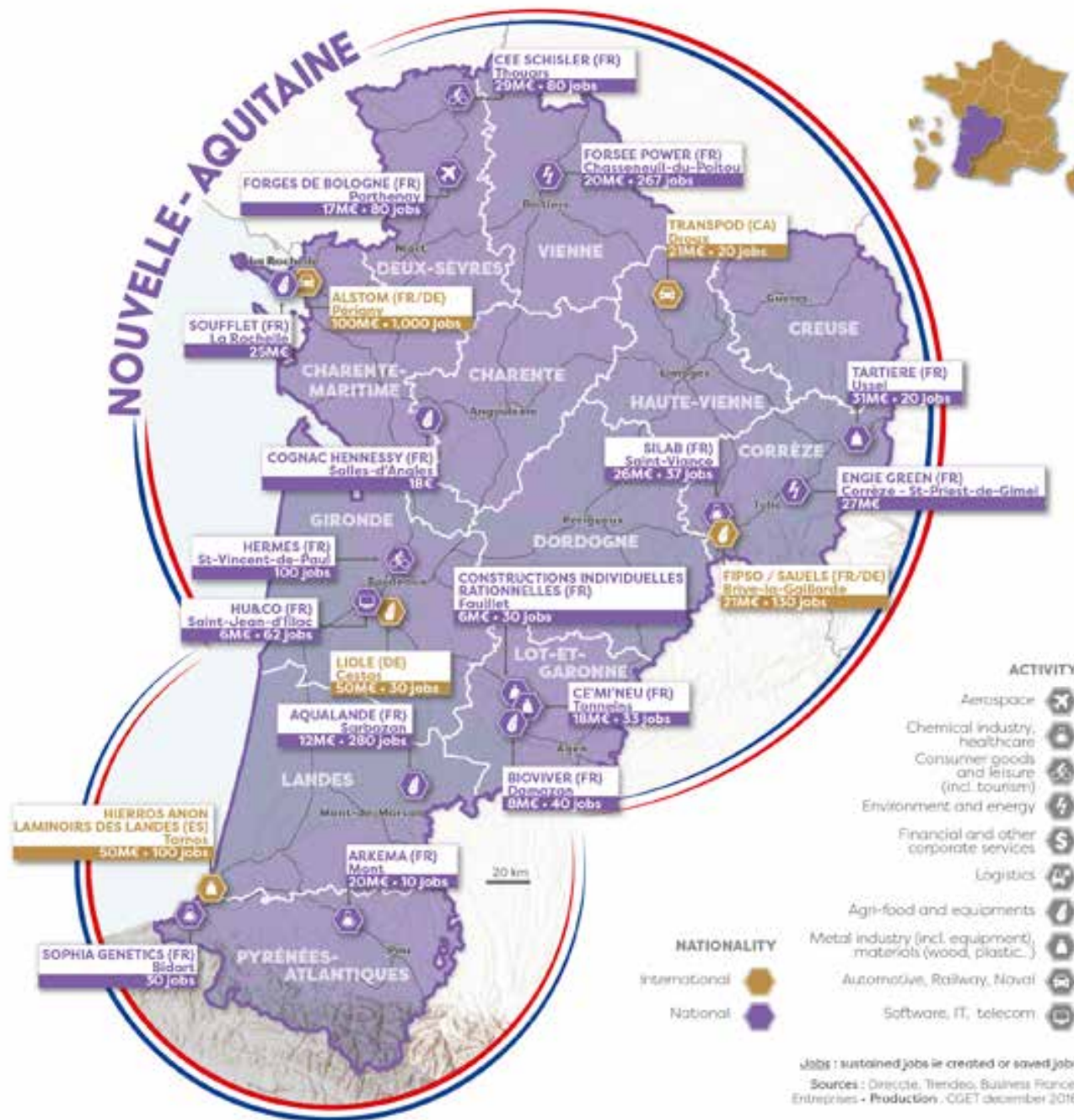
As mainland France's leading region in terms of wooded areas (2.8 million hectares), Nouvelle-Aquitaine is home to timber harvesting, sawmilling and furniture-making activities, as well as the paper industry.

Thanks to the Energies Stockage cluster, the region is also well-positioned in terms of renewable energies (especially wind, geothermal, marine and solar energy). The cluster brings together stakeholders to address shared challenges, including management of intermittent renewable energies, energy storage including new forms of batteries, solar energy, hydrogen and cooperation with other materials sectors, and digital technology.

## A SOLID ECOSYSTEM TO SUPPORT TECHNOLOGY TRANSFER AND INNOVATION

As France's leading region in terms of support for R&D, the Nouvelle-Aquitaine ecosystem is home to a large number of clusters, "third places" (fab labs, coworking spaces) and competitiveness hubs that drive innovation in the region's strategic sectors.

Bordeaux, which has been named a "French Tech city", promotes ecosystems that are conducive to the creation and growth of start-ups. The Digital Aquitaine cluster provides support and impetus for joint efforts between regional companies and the digital sector. Areas such as virtual and augmented reality, video games, IT services and e-healthcare are expanding and welcoming an increasing





## KEY ECONOMIC DATA

**€153bn** Regional GDP  
**7.2%** Contribution to France's GDP  
**5.6M** Population

## A STRATEGIC LOCATION IN THE HEART OF SOUTHERN EUROPE

Occitanie is France's second-largest region in surface area, with two European-sized cities, Toulouse and Montpellier. It is strategically located in the heart of southern Europe. A sea-facing region, Occitanie is home to France's largest network of regional ports providing value in terms of shipping and logistics thanks to its three commercial ports.

## A BOOMING NATIONAL AND EUROPEAN-LEVEL ECONOMY

Demographically, Occitanie is growing by leaps and bounds – its population increases each year by 50,000 inhabitants – and the region's economic appeal is noteworthy. Its per-capita wealth puts in in line with Catalonia. It is the leading region in France in terms of rates of business creation.

Agriculture, which takes up half of the region's land mass, drives a powerful **agri-food sector** whose key features are quality, organic farming (it is the country's top organic region, with more than 7,000 organic producers, accounting for 20% of the total), regional specialties and a strong Mediterranean emphasis. It is also the world's largest "appellation" wine region.

Its expertise in **aeronautics, space and embedded systems are known the world over**. With more than 800 companies, 86,000 jobs – one-fourth of the European space workforce – Occitanie is the leading European region in these sectors, notably due to the presence of Airbus, Thales Alenia Space, and the National Centre for Space Studies (CNES).

**Renewable energies** are one of Occitanie's strong points: the region has immense green energy potential and is poised to become Europe's first Positive Energy Region by 2050. Within France, it ranks second in terms of renewable energy production, photovoltaic production and hydroelectric production, third in terms of wind power and fifth when it comes to biomass.

## INTELLECTUAL CAPITAL AND A THRIVING INNOVATION ECOSYSTEM

With 35 grandes écoles and two universities, Occitanie

has the third-largest student population in France (nearly 230,000), together with 29,400 researchers, ten institutions dedicated to technology transfer (including the IRT Saint Exupéry Technology Research Institute, Toulouse Tech Transfer, AxLR), and several dozen clusters and business networks (including one global cluster and two with a global focus).

In 2018, the city of Toulouse hosted the 8th edition of the Euro Science Open Forum, Europe's largest interdisciplinary professional gathering devoted to science and innovation. This was a first for France.

Montpellier has become a leader in France in the field of **video games**. Ubisoft has set up shop here in the 1990s, and a number of independent studios open their doors each year, creating an ecosystem that is propitious for start-ups. By way of example, in 2018, Ubi Global ranked the Business & Innovation Centre (BIC) in Montpellier the second-best incubator in the world.

## A THRIVING TOURIST SCENE DRIVEN BY WATER SPORTS AND HYDROTHERAPY

Occitanie's Mediterranean shoreline, two mountain ranges and robust historical and cultural identity make it the fourth most popular tourist destination in France. It is also the country's number one spa region, welcoming 166,000 visitors each year.

## FOREIGN INVESTMENT

The Occitanie region is the third-largest destination for foreign investment in France: 140 projects were finalised in 2017, creating or saving 3,349 jobs. Biotricity, an American company, is investing €70m in a combined heat and power (CHP) plant fuelled by biomass in Maubourguet (Hautes-Pyrénées département). This project was one of the winners of an invitation to tender from the Ministry for the Ecological and Inclusive Transition.

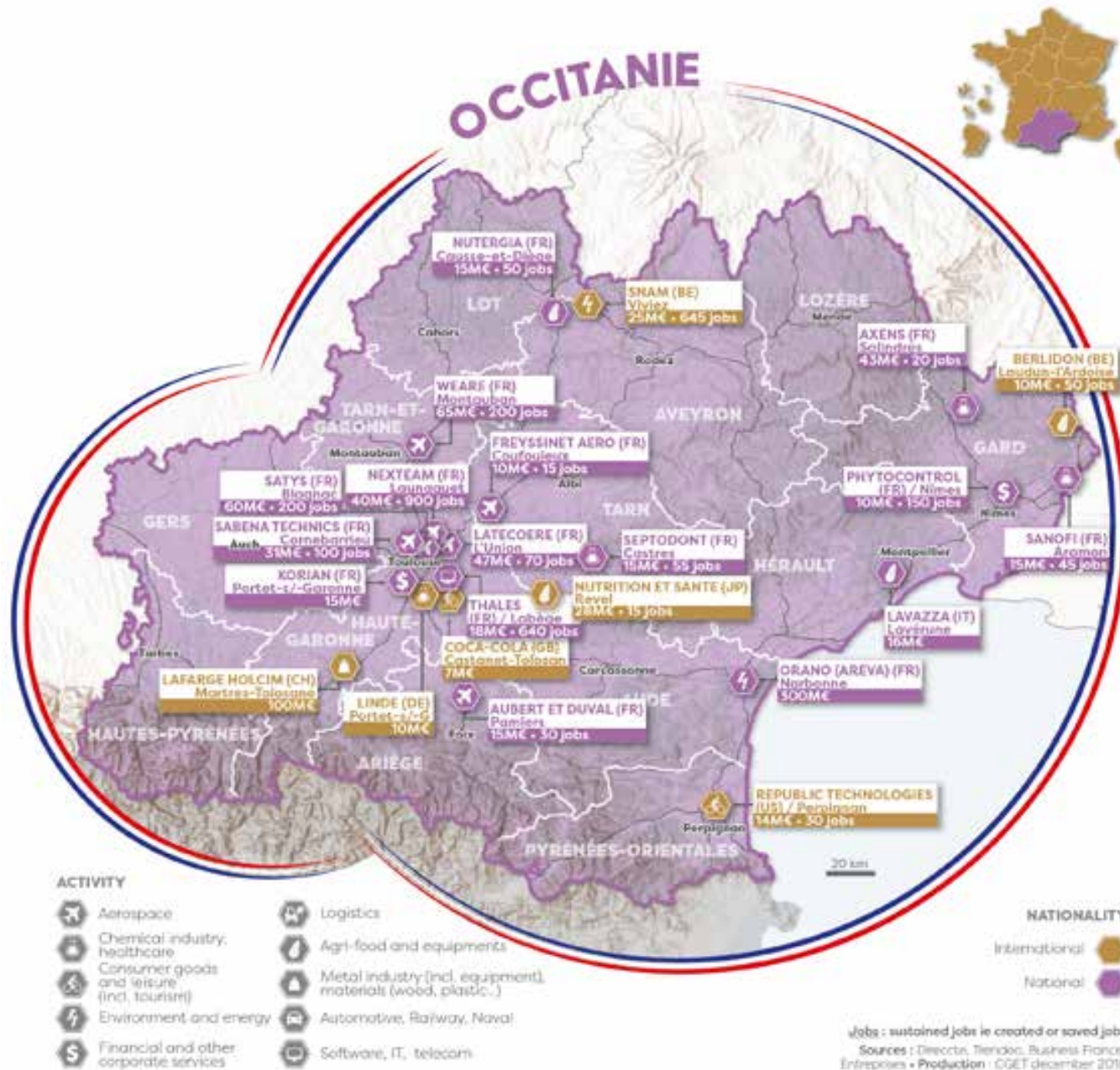
Privately-held company Lavazza has invested €16m to make the Lavérune (Hérault département) plant a centre of excellence for locally-produced coffee.

## CONTACT

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# PROVENCE-ALPES-COTE D'AZUR

## KEY ECONOMIC DATA

**€152bn** Regional GDP  
**7.1%** Contribution to France's GDP  
**5M** Population

at Le Castellet and the 2024 Summer Olympics, for which some events will be held in Marseille.

## AN INTERNATIONALLY-ORIENTED REGION

The Sud region is home to 100,000 foreign residents of 160 different nationalities, as well as more than 2,200 foreign companies.

Over the past decade, it has been the focus of 674 foreign investment projects, which have created or saved nearly 20,000 jobs – an average of one project per week.

The Sud region is also home to ITER, the world's largest fusion experiment, representing more than €18bn in investments.

## GLOBAL CONNECTIONS

Marseille Fos Port, the gateway to southern Europe, providing access to Africa and the Middle East. Toulon, Europe's largest military port.

**International airports:** Nice Cote d'Azur (France's second-largest in number of passengers), Aix Marseille Provence.

## AT THE FOREFRONT OF INNOVATION

The Sud region employs 29,000 people in R&D and is home to Sophia-Antipolis, Europe's largest technology park. It has 300 public research laboratories, four leading universities, four French Tech ecosystems and a number of clusters.

## NEW ARRIVALS IN 2017

The German company Sartorius Stedim Biotech, which specialises in the production of single-use biopharmaceutical bags and containers, is investing €23m in R&D and in its plant near Marseille. It is also boosting production capacity and investing €10m to expand its logistics platform, creating 200 additional jobs.

Symphony, which was set up in 2014 in California's Silicon Valley, has decided to open its first European R&D centre in Sophia Antipolis, employing 100 engineers.

Mercedes opened an "Advanced Design Centre" in Sophia Antipolis, with a surface area of more than 3,000 m2 and space for 50 designers.

The Indian IT firm Infosys has opened a development and innovation centre in Marseille with 80 engineers.

## CENTRES OF EXCELLENCE

**Industries of the Future:** over 23,000 industrial firms, including Airbus Helicopters, Thales, Naval Group, CMA CGM, the CNIM group and L'Occitane

**Intelligent tech:** 22,000 companies

**Innovative healthcare:** the Sud region is a French leader in terms of clinical trials

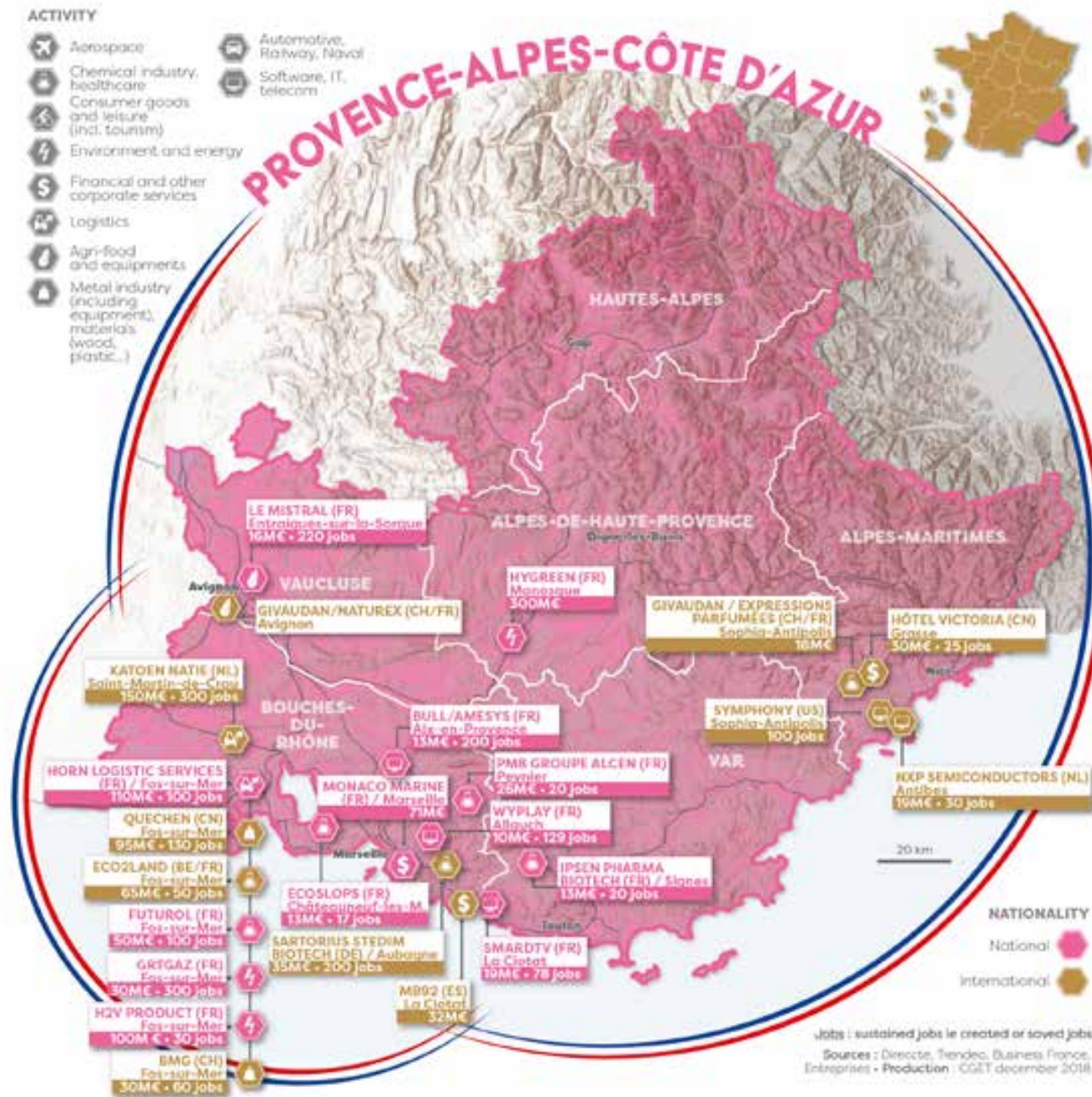
**Renewable energies:** smart grids, hydroelectric plants, and France's number one region for solar power

**The natural world:** cosmetics, agri-food, plant extracts, and home to 50% of France's production of scents

## CONTACT

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## THE FRENCH WAY OF LIFE

The Sud region attracts more than 34 million tourists annually. Set between sea and mountains, the region is well-known for the beauty of its natural landscapes. Its cultural heritage is no less remarkable, with more than 2,200 listed historical monuments and five sites on the UNESCO World Heritage list. The region hosts 220 festivals each year, including several of international scope – the Cannes film festival, the Festival International d'Art Lyrique in Aix and the Festival d'Avignon, among others – as well as major sporting events such as the French Grand Prix



# PAYS DE LA LOIRE

## KEY ECONOMIC DATA

**€106bn** Regional GDP  
**5%** Contribution to France's GDP  
**3.7M** Population

## FIRST-CLASS WINE TOURISM

The 800-kilometre Loire Valley Wine Route winds its way through one of Europe's top ten vineyards, which is also listed as a UNESCO World Heritage Site. It produces 50 appellations, designations and other labels

## INDUSTRIES OF THE FUTURE

Thanks to the presence of nine clusters, an international clientele, subcontractors and cutting-edge facilities, advanced production technologies are a top priority in the Pays de la Loire region. "Jules Verne Manufacturing Valley" certification symbolises a top-flight French ecosystem of production know-how, and boosts the region's reputation as a vanguard for advanced manufacturing.

The region particularly shines in the areas of aeronautics (Airbus, Thales, Spirit Aerosystems, Daher, etc.), agri-food (1,000 companies with 50,000 employees) and healthcare (bioformulation, development of anti-cancer vaccines, immunology and e-healthcare in particular).

In the automotive sector, the Pays de la Loire region offers investors a robust ecosystem focused on the car and on future mobility issues (presence of car manufacturers, top-flight subcontractors and embedded electronics gathered around the ID4CAR cluster). The region also organises the 24 Hours of Le Mans, one of world's most prestigious sports car races.

## AN EXCELLENT PLACE FOR FOREIGN INVESTMENT

The Pays de la Loire has appeal for foreign investors. The region's economic fabric, with its robust industrial component consisting primarily of mid-tier companies, is of particular interest to foreign investors.

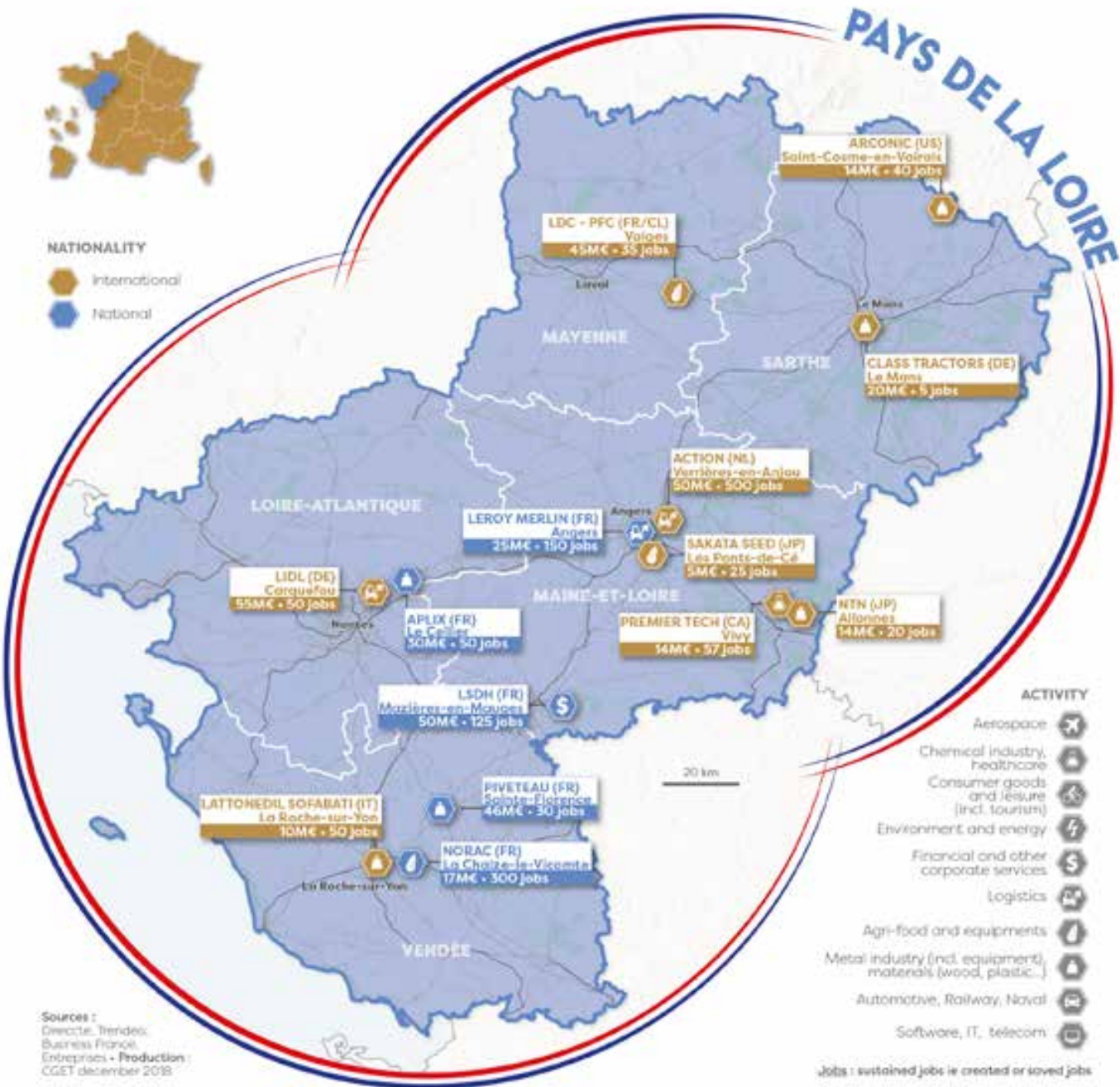
A total of 57 foreign investment projects were finalised in 2017, creating 1,626 jobs.

The American company Arconic (formerly Alcoa), which specialises in manufacturing and machining metal parts, has invested €14 in upgrading its plant at Saint-Cosme-en-Vairais (Sarthe département). The site employs more than 700 people and produces screws and nuts for the aerospace and automotive industries.

## CONTACT

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## THE NEW MARITIME ECONOMY

For a century and a half, the Pays de la Loire has been France's top region in terms of naval and nautical industries. Harmony of the Seas, the world's largest cruise ship, was launched from the STX shipyard in Saint-Nazaire.

It is also France's capital for marine renewable energy (MRE). The region generates one-third of the country's offshore wind power and is home to leading manufacturers (Alstom-GE, DCNS, Rollix, STX), as well as Neopolia EMR, a cluster that brings together 115 companies throughout the MRE value chain.

Nantes Saint-Nazaire Port provides companies with a logistics platform and access to the sea,



## KEY ECONOMIC DATA

**€8.8bn** Regional GDP    **0.4%** Contribution to France's GDP    **337 796M** Population

## DEVELOPMENT PROSPECTS LINKED TO SPECIFIC ADVANTAGES

Tourism is the island's leading economic sector (24% of GDP excluding air and sea transport, some 19,000 seasonal jobs, 72% filled by locals and the remaining 28% by outsiders).

Corsica boasts an innovative, forward-looking entrepreneurial fabric in the **agri-food, digital and aeronautics** sectors (Corse Composites Aéronautique, the region's top exporter, is a world-class equipment manufacturer; companies in this sector have joined forces as part of the Corsica Aeronautics Industries Cluster).

Due to its many territorial advantages, Corsica offers promising development prospects in such areas as:

- Renewable energies: solar, biomass and wind power
- The environment: nature, landscape, water sports, maritime in the broad sense, wood (Corsica is France's most wooded region)
- Digital technology (digital firms grouped under the Corsican Tech initiative are establishing dedicated ecosystems in Bastia and Ajaccio)
- Natural and cultural heritage, including eco-tourism.

## A SPLENDID NATURAL SETTING IN THE HEART OF THE MEDITERRANEAN

Set in the Mediterranean some 170 km southeast of the French Riviera and 80 km from the west coast of Italy, Corsica offers a connection to international capitals.

A mountainous island offering an incomparable quality of life, over a thousand kilometres of coastline, four airports and six seaports spread across the region, the "Island of Beauty" is one of the world's most-visited destinations.

## ONE OF FRANCE'S MOST ATTRACTIVE REGIONS

Since 2009, Corsica has experienced strong demographic growth – nearly twice that of the French average.

This trend is reflected in the brisk pace of housing construction and renovation, which gives the construction sector a predominant place.

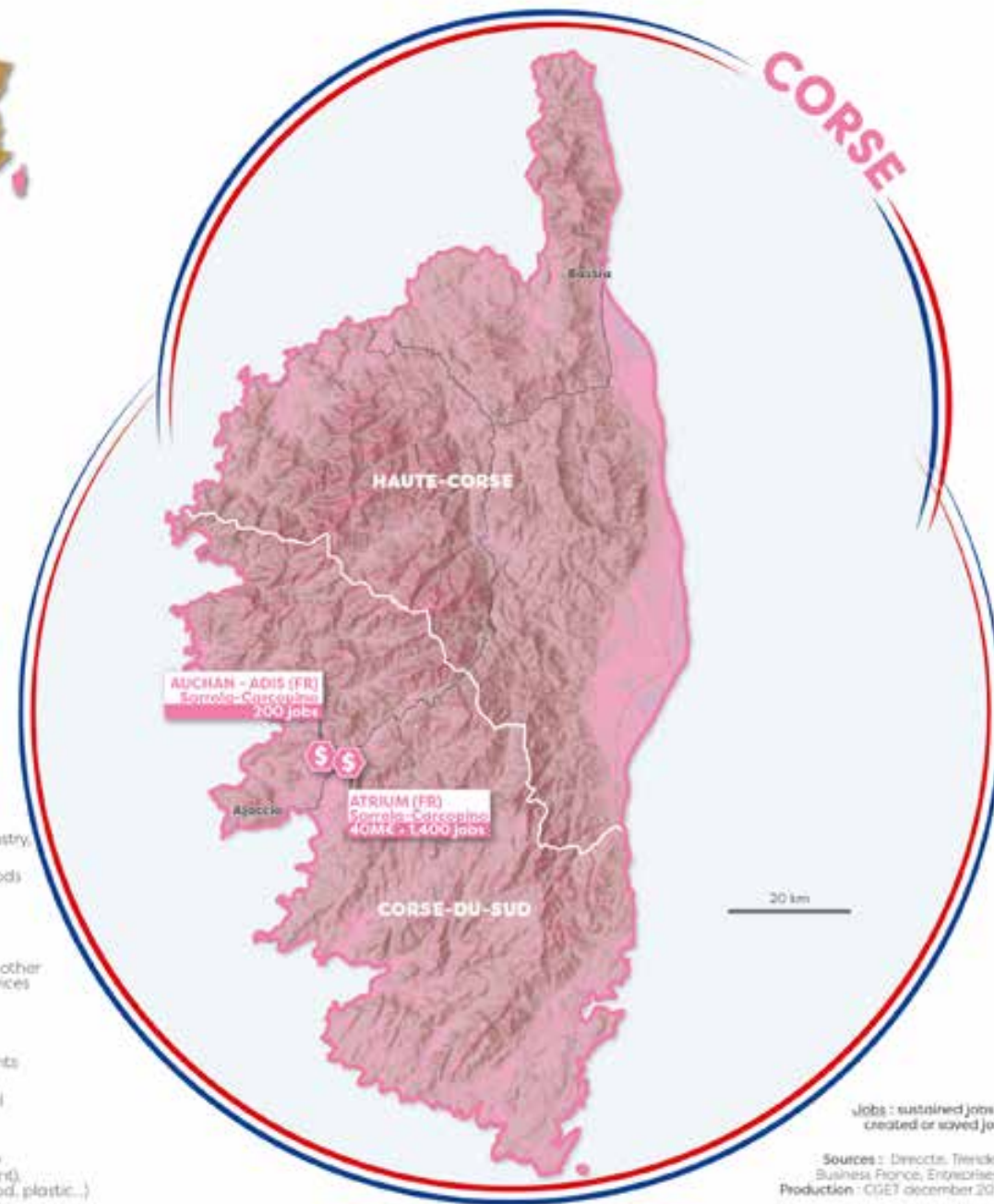
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**NATIONALITY**  
 International  
 National



# FRANCE'S OVERSEAS TERRITORIES

There are 12 overseas territories: Guadeloupe, French Guiana, Martinique, Réunion, Mayotte, New Caledonia, French Polynesia, Saint Barthélemy, Saint-Martin, Saint-Pierre and Miquelon, the French Southern and Antarctic Lands, and the Wallis and Futuna islands, which together have almost 2.6 million inhabitants. Because of its overseas territories, France is the only EU country that is present in three separate oceans. They help consolidate France's second place worldwide in terms of maritime reach and make a telling contribution to the rollout of the country's maritime and "blue growth" policies. These territories enshrine the future of energy as they are the "100% renewable energy" forerunners of the energy transition and the promotion of clean transportation.

## MAYOTTE: A CROSSROADS FOR MARITIME TRADE BETWEEN EUROPE AND THE INDIAN OCEAN

Located at the northern entrance of the Mozambique Channel and 250 km from Madagascar, the island of Mayotte has been a crossroads for maritime trade between Europe and the Indian Ocean for centuries. The island's natural and cultural advantages provide strong potential and the sharp increase in the number of air passengers, together with the introduction of a direct flight between Paris and Mayotte, are leveraging growth.

### CONTACT

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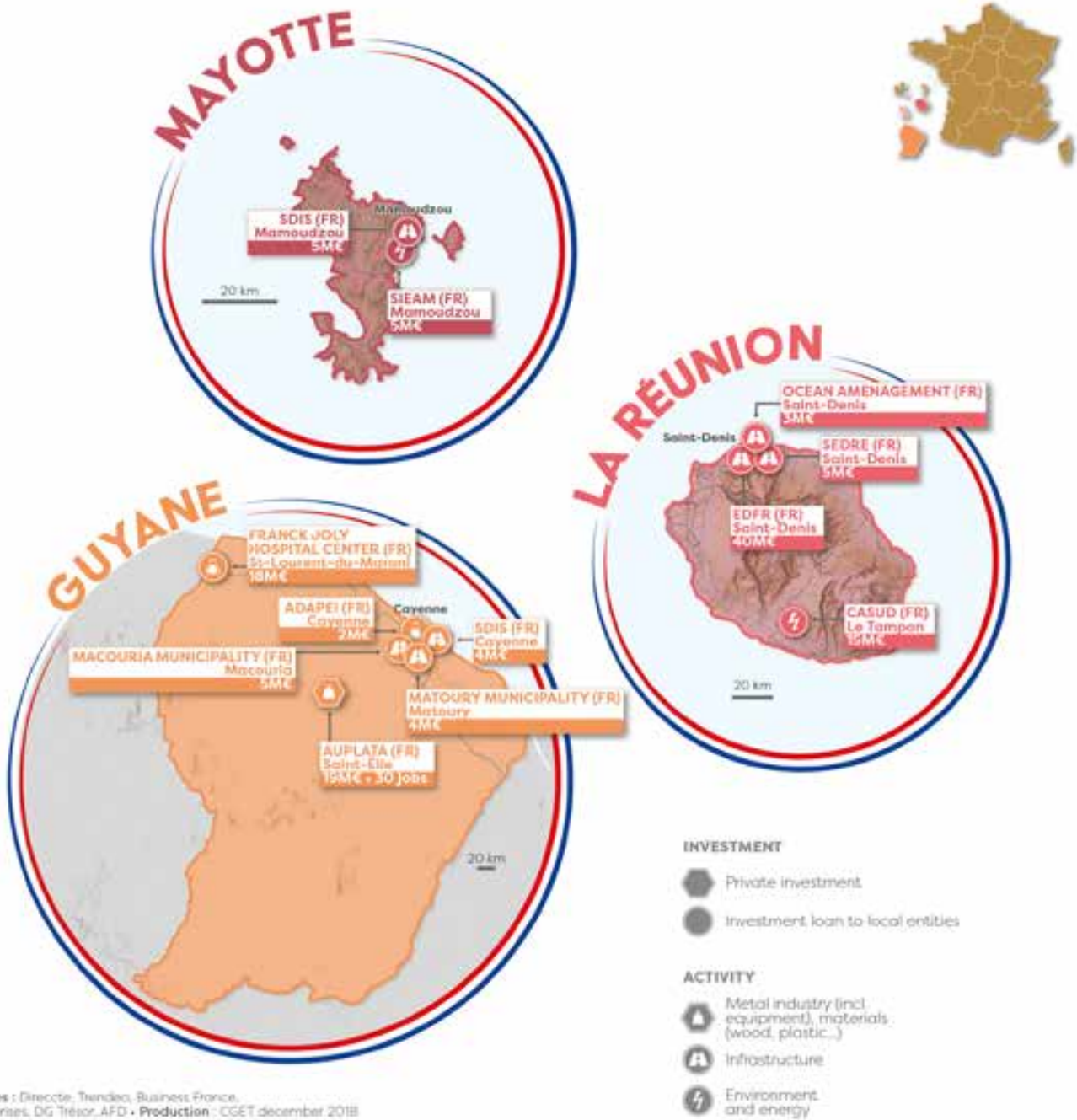
Mayotte contact: **Agence de Développement et d'Innovation de Mayotte, Frantz Sabin, Managing director**  
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## FRENCH GUIANA: A EUROPEAN PRESENCE IN SOUTH AMERICA

French Guiana is located on the north Atlantic coast of Latin America and its growth is based on its exceptional geostrategic location, a qualified and competitive workforce, and an abundance of natural resources. Aerospace-related activity, which is centred on the Guiana Space Centre and a number of research centres, mean that French Guiana has the second-highest proportion of research jobs in all of France's regions, just behind the Greater Paris region. French Guiana also has substantial resources (gold, iron, bauxite and diamonds) as well as major ecological treasures: the Amazon rainforest covers 95% of its surface area, i.e. over eight million hectares. Seafood-related trade puts Cayenne in fourth place for French fishing ports.

## REUNION: EUROPE IN THE MIDDLE OF THE INDIAN OCEAN

With its unique geographical location, its status as an ultra-peripheral region and its vibrant environment, Réunion has many competitive advantages, fostering access to the economic markets of the Indian Ocean area, Asia, the Middle East, Africa and Europe. The island provides an ideal bridgehead for the expansion of economic activities towards these regions. Its economy, which is focused on agriculture and tourism, is driven by the presence of major companies and a flourishing innovation ecosystem coordinated by a Technopole and a cluster (Qualitropic) which is centred on the tropical bioeconomy.



Sources : Direccte, Trendeo, Business France, Entreprises, DG Trésor, AFD • Production : CGET décembre 2018



# FRANCE'S OVERSEAS TERRITORIES

## GUADELOUPE: A FRENCH REGION AT THE HEART OF THE AMERICAS

Guadeloupe is located in the Caribbean at three-hour's flight time from the USA. Its port infrastructure is comprised of 13 multipurpose ports, 10 fishing ports and three marinas. Grand Port Caraïbes is ISO 14001-certified and is recognised and has won awards for the standard of its services at Caribbean level. Guadeloupe Pôle Caraïbes airport, which can handle four million passengers per year, is the overseas territories' leading airport. The island has innovation centres, clusters and technical networks (Synergile, GuadeloupeTech, Cluster Maritime Guadeloupe, RITA).

## CONTACT

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## MARTINIQUE: THE PEARL OF THE FRENCH ANTILLES

Martinique, which lies halfway between Brazil and the USA, is an associate member of the Association of Caribbean States (ACS). The fact that it is part of French national territory, coupled with its status as an EU ultra-peripheral region, mean that the island is aligned with French standards in terms of business climate whilst being able to represent Europe in a thriving region with a North American influence. Martinique has the seventh busiest French port infrastructure in terms of traffic as well as top-tier airport facilities.

