

WELCOME TO THE Jud REGION

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 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.

Renaud Muselier,

President of the Provence Alpes-Côte d'Azur Region President of the Regions of France

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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: Learn more

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.

Briancon GAP Embrun Laragne-Montéglin Sisteron Orange **DIGNE-LES-BAINS** Carpentras **AVIGNON** Monaco Manosque Grasse Cavaillon NICE Aix-en-Provence Draguignan Istres St Tropez MARSEILLE La Seyne-sur-Mer

Source: Region Sud, Economic Panorama 2020





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)

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**

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



19% Commercial - marketing

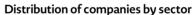
More than 613 000 businesses

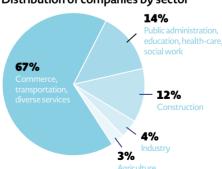
More than 4900 companies with at least 50 employees

BUSINESS & EMPLOYMENT

- 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

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





DISCOVER THE TERRITORY 9 THE SUID B

8% Computers - IT

1% Industrial worksite

Service operations

Purchasing quality, maintenance,

logistics, security

% Administration HR, communication

Finance, accounting, auditing

% Executive suite

Spotlight on

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.

Arkopharma

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.

AROMA = ZONE

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.

Coca Cota Midi

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.

COLLINES

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

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. Thanks to the dedication of its 85 employees, OvinAlp is continuing to develop with its rigorous traceability system and its healthy, sustainable products based on traditions that date back a millennium



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 company has a unique range of industrial capabilities and the ability to set up innovative strategic partnerships, which allows it to meet the needs of its customers. In 2019, this major market power had more than 15 000 employees and a turnover of €3.7 billion. The group is expected to recruit 10 000 to 12 000 new talents by 2028.

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

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Spotlight on

A SELECTION OF MAJOR PROFESSIONAL EVENTS SOME OF THE MAJOR PROFESSIONAL EVENTS CONNECTED TO THE 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, yo 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.

Learn more

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.

Learn more

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.

Learn more

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.

Learn more [site in French]

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 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.

Learn more [site in French]

L'Usine extraordinaire (The Extraordinary Factory] (2nd national edition in Marseille) is an exhibition that aims to take the general public behind the scenes of the modern, inspiring, and connected production site that is today's factory by offering four different tours: Invent, Connect, Manufacture, and Share. Supported by the Fondation Usine Extraordinaire and backed by the French Fab network, this event enables industrial companies to showcase their savoirfaire and attract new talent.

Learn more [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.

Learn more

SILVER ECONOMY -

AgeingFit (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 microenterprises.

Learn more

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.

Learn more

The International Society for Heart and Lung Transplantation (Nice)

The annual ISHLT meetings and sessions bring together the world's leading experts in treating advanced heart and lung disease. These unique meetings offer a comprehensive review of new research, including the latest advances in transplantation, mechanical support, and innovative therapies.



DISCOVER THE TERRITORY 12 THE SUD REGION DISCOVER THE TERRITORY 13 THE SUD REGION

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.

Learn more

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.



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.

Learn more

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.

Learn more

Cannes Film Festival (Cannes): the most prestigious gathering for the film industry and one of the most publicized events in the world. For 12 days, 80 000 festival-goers from around the globe come together to celebrate cinema and reward the best films of the year. The festival is reserved for film professionals, although some screenings are open to the general public.

Learn more

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.



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.

Learn more

Méditerranée du Futur (Marseille) is a day dedicated to Euro-Mediterranean cooperation that brings together high-level speakers and participants with a focus on three themes: 1/ diplomatic cooperation; 2/ investment: and 3/ the shared challenges facing the Mediterranean.

Learn more

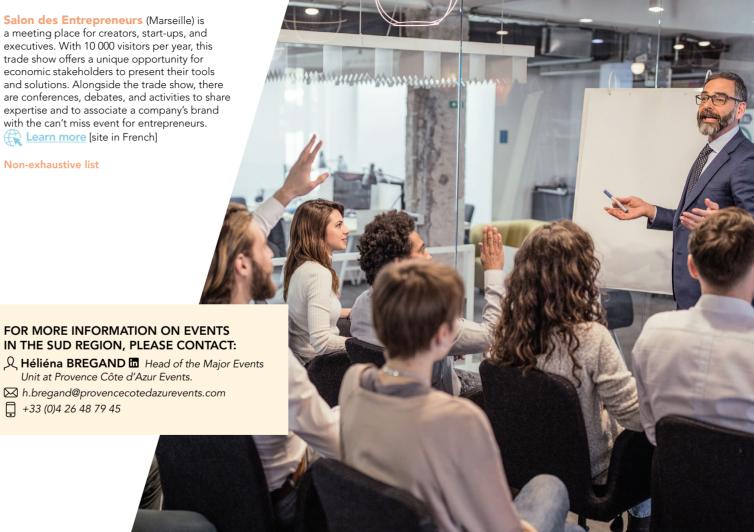
MIPIM (Cannes) is the world's leading trade show for real estate professionals and it brings together the most influential stakeholders in the international real estate industry. It offers a diverse four-day program of conferences, workshops, case studies, and networking opportunities.

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. Learn more [site in French]

. Unit at Provence Côte d'Azur Events.

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Non-exhaustive list



AN INNOVATIVE TERRITORY French region for innovation 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
- 16 business accelerators
- a diverse network of more than **30 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

with 396 European

patent applications



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 tragrances and Havors

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



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 received official PARC ENGAGÉ certification for its commitment to quality, while it also benefits from a strategic location and fiber optic infrastructure. The Territoires d'Industrie program promotes local industrial development by mobilizing human, financial, and technical resources
- 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 highperformance 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 Al, 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: an Operation of Interest to the Nation (OIN) that balances economic growth with an environmental approach that fosters iob creation and is dedicated to development and new innovations in areen technology, smart cities, and healthcare
- 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



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
- 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

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.



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

- 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

The flagship structures in the ecosystem

- **SCS** (Secured Communicating Solutions) is a global competitiveness cluster dedicated to digital technologies with 300 stakeholders, more than €1 billion in R&D investments, €500 million raised in investment funding
- For 25 years, **Euroméditerranée** has been designing, developing, and 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

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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.



- €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 worldclass 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.



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.

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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

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

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 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 interprofessional organizations, companies, competitiveness, innovation and research clusters, and technology transfer centers.

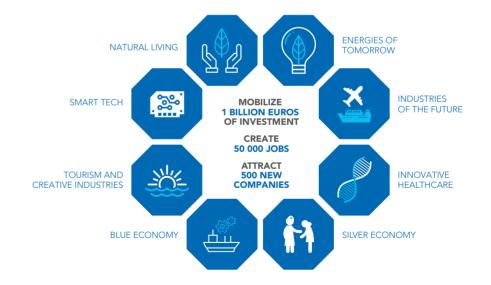


A REGION COMMITTED TO DEVELOPING ITS TERRITORY he Montagne Saint-Victoire outside of Aix-en-Provence (13) Source: risingSUD, 2020

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, ORTEC Group, CMR Group, ENGIE, Safran, Air Liquide, Areva, Dassault, Total, Schneider Electric, Naval Group, CNIM, etc.
- Parcours Sud Industrie 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 Sud



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.

- Medical therapies: 300 ultra-specialized establishments located in the region
- 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
- High-growth companies: Sanofi, 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**

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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
- 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 Nimes, 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 crossdisciplinary 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

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2. THE SMART REGION, COMMITTED TO THE FUTURE

With its initiative to build a Smart region, the 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:

- To cover the entire territory with **high-speed internet** by 2025
- To be recognized as a **leading territory for experimenting with innovative new services** with
 the "Sud Labs" program, which aims to provide
 access to digital technology to everyone across
 the region
- To **encourage data-based innovation** and accelerate the digital transformation with the DataSud initiative, a shared open data platform
- To support the **digital transition of SMEs** and enable them to meet challenges posed by digital technology
- To foster the creation of an **innovation ecosystem** through the Lab4Lab program
- To adopt artificial intelligence as a way to boost development and ease tensions in the labor market



- ITER: the International Thermonuclear Experimental Reactor is an international nuclear fusion research project located at the Cadarache site
- 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 (Bouches-du-Rhône)
- 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)
- HyGreen Provence: an ambitious project for hydrogen production from renewable energies and hydrogen storage in large underground spaces for local use Manosque and surrounding area (Alpes-de-Haute-Provence)

For more information on major structural projects, contact

Caregory VARAGNOL
Business Unit Manager for the OIR strategic sector program

⊠ gvaragnol@risingsud.fr

3. FRENCH TECH RÉGION SUD

French Tech is a network of entrepreneurial communities supported by public stakeholders that aims to make France one of the most attractive countries for launching start-ups.

Through 13 French Tech capitals and 38 French Tech communities in France, it promotes the emergence of start-ups with solid growth potential and the strong possibility of creating value and jobs.

In the Sud region, two French Tech capitals and two French Tech communities serve as motors for the region's tech ecosystem: start-ups, support structures, investors, public decision-makers, and major companies work together to promote

For more information on the French Tech network in the region, contact: French Tech Aix-Marseille: communication@lafrenchtech-aixmarseille.fr French Tech Côte d'Azur: A Farouk RAÏS, Coordinator - +33 (0)6 12 98 40 52

French Tech Grande Provence (Avignon):

Q Etienne LAFFAIRE, Startup Manager & Corporate ☑ etienne.laffaire@lafrenchtech-grandeprovence.fr +33 (0)4 90 22 72 24 – +33 (0)6 03 67 13 81

French Tech Toulon: Q Jean-Yves KBAIER, Chairman of French Tech Toulon +33 (0)4 94 03 89 66 - +33 (0)6 34 30 09 55 the development of local start-ups and contribute to their international influence.

The national French Tech 120 program targets high-potential French start-ups. It aims to create world-class tech leaders through enhanced support from public stakeholders (the French government, the Banque de France, the URSSAF social security system, the French treasury department, etc.).

Coordinated by the Bpifrance public investment bank, the French Fab initiative is a showcase of French industrial expertise that aims to attract international talent and investment. It brings together companies in the French industrial ecosystem that are committed to growth, innovation, and international development.









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 Turks.



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



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).



Port:

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



RENOWNED INTERNATIONAL SCHOOLS

The Sud region has a high concentration of international schools with more than 60 public and private establishments offering international education from kindergarten to high school. These include the International School of Marseille, the International School of Nice, Sainte Victoire International School, the International Bilingual School of Provence in Luynes, the Mougins School, the Institut Stanislas in Cannes, and the Centre International de Valbonne.

Higher education offers a wide range of international courses through **international partnerships**, specialized Masters degrees, and multidisciplinary programs.

Renowned language centers provide their services to international students and residents wishing to improve their language skills.

FOCUS ON THE CITÉ SCOLAIRE INTERNATIONALE IN MARSEILLE

Beginning in 2024, the Cité Scolaire Internationale will open its doors to nearly 2100 students from primary school to high school and will offer a unique educational program in five different languages.

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 (DELF) or the British IGCSE (International General Certificate of Secondary Education).



- 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 €7 billion in investments).
- Nice Écovallée, the largest Operation of Interest to the Nation in France, is proposing a new development and urban planning model that combines economic and environmental goals with the aim of boosting the economy and the quality of life 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 center dedicated to positive impact projects. It has three missions: 1/ To support and initiate strategic and sustainable economic transformations by adopting innovative methods 2/ To provide continued training to foster change 3/ To organize events that provide meaningful experiences.



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 / ÉA ÉCO ENTREPRISES (Delegation the Sud region) - Water services Aix-en-Provence (13) / Nice (06)

Four strategic focuses to provide solutions and innovations for the social, economic, and environmental challenges of water management and its uses:

- Identification and mobilization of resources
- Coordinated resource and use management
- Reuse of water from all sources
- Institutional and societal approaches





CAPENERGIES - Low-carbon energy sector cluster Aix-en-Provence (13)

Mission: To facilitate the emergence of innovative projects and support their development to accelerate the energy transition.

Three strategic focuses:

- Decarbonize energy use and improve energy efficiency
- Optimize and secure energy systems
- Produce low-carbon energy





Marseille (13) – Nice / Sophia Antipolis (06) – in the Occitanie region (Toulouse, Montpellier)

Dedicated to healthtech (biotech, medtech, e-health). The cluster provides resources and offers dedicated solutions to companies and research organizations in the health sector to help them innovate, identify financing, and develop their companies in order to improve patient care and quality of life.

www.eurobiomed.org



INNOV'ALLIANCE Competitiveness cluster for the natural living sector Avignon (84) - Grasse (06)

Supporting the environmental and technological transition of the agriculture sector with a focus on food and beverages. cosmetics, health ingredients & food supplements, and flavors & fragrances. Customized services to boost your network and develop your business!

www.pole-innovalliance.com



MER MÉDITERRANÉE - Cluster with an international scope Ollioules (83)

To sustainably develop the maritime and coastal economy in the Mediterranean basin and around the world by promoting the emergence of innovative projects and supporting the growth of companies.





Marseille (13)

Competitiveness cluster specializing in optics, imaging, and photonics (use of light).

www.pole-optitec.com



SAFE CLUSTER

Aix-en-Provence (13)

Competitiveness cluster focused on the aeronautics & space, security & safety, defense, and risk management sectors.

www.safecluster.com



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

Brings together leading stakeholders in the fields of IoT, Big Data & Al, microelectronics, and digital security technologies.

List in alphabetical order

www.pole-scs.org/en/scs-cluster/about-us/

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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

clusters

15

business incubators, including 3 with ministry certification

More than

30

business start-up facilities



risingSUD

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Côte d'Azur Metro Area government; the Toulon Provence Méditerranée Metro Area government; and Provence Côte d'Azur Events.