



Invest in
Grenoble-Isère,
France

www.grenoble-isere.com

A photograph of a cable car system in Grenoble, France. Several spherical glass cable cars are suspended from a yellow and red metal track, moving over a dense urban landscape. In the background, there are blue-toned mountains under a clear sky. The image is partially obscured by a white diagonal shape in the bottom right corner.

/ KEY ECONOMIC FIGURES
GRENOBLE-ISÈRE
FRANCE / 2016

Located in one of Europe's most dynamic regional economies

GRENOBLE-ISÈRE
CAPITAL OF THE FRENCH ALPS



France's Auvergne Rhône-Alpes Region

A region the size of Ireland and home to more people than Switzerland

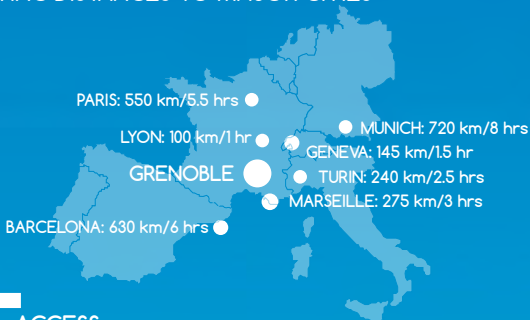
- . Europe's sixth-largest GDP at €239bn
- . France's second-leading region for economic activity and tourism
- . France's top region for manufacturing
- . France's second-largest hub for R&D



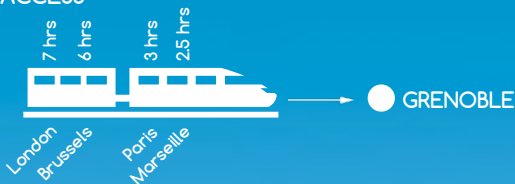


Your gateway to Europe and the world

DRIVING DISTANCES TO MAJOR CITIES



RAIL ACCESS



CONVENIENT ACCESS to three international AIRPORTS

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



The Isère district: a population of 1.3 million and home to 500,000 jobs

A YOUNG, EDUCATED, AND ACTIVE POPULATION

- 33% of the population is under age 25 (vs. 31% for all of France)
- 30% of the population over the age of 15 has completed at least two years of higher education (vs. 26% for all of France)

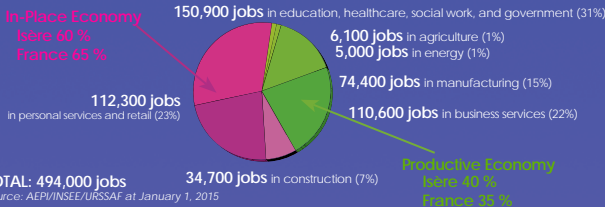


Greater Grenoble metro area 759,000 inhabitants
 Isère District 1,252,000 inhabitants
 Auvergne Rhône-Alpes Region 7,868,000 inhabitants
 France 66,136,000 inhabitants
 European Union 508,191,000 inhabitants

Diagram courtesy of AEPI/INSEE/Eurostat 2014

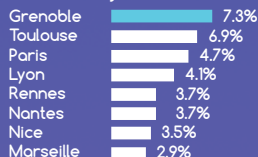
A STRONG MANUFACTURING BASE

- 15% of jobs in Isère are in manufacturing (vs. 11% for all of France)



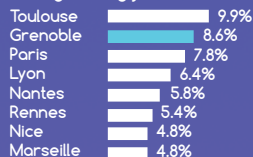
THE GRENOBLE METRO AREA: A WHITE-COLLAR, RESEARCH-DRIVEN JOB MARKET

Top 1 in France
for research jobs



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

Top 2 in France
for engineering jobs



Percentage of engineers in total workforce

Source: INSEE, 2012

A diversified economy



MULTINATIONAL CORPORATIONS DRIVE THE LOCAL ECONOMY

Employees

STMicroelectronics	France/Italy	Microelectronics	6,000–7,000
Schneider Electric	France	Energy management	5,000–6,000
<i>Electricité de France</i> (EDF)	France	Energy	2,000–3,000
Caterpillar	United States	Construction equipment	1,500–2,000
HP	United States	IT	1,500–2,000
BD	United States	Medical technology	1,500–2,000
Atos	France	IT	1,000–1,500
Capgemini/Sogeti	France	IT	900–1,000
GE Renewable Energy (formerly Alstom Hydro)	United States	Hydroelectric turbines	900–1,000
Soitec	France	Microelectronics	800–900
Air Liquide	France	Industrial Gaz	800–900

A BROAD RANGE OF INDUSTRIES REPRESENTED

	Number of jobs
Electrical equipment and electronics	23,800
Metallurgy, Mechanics	23,500
Digital technologies, software, engineering, and consulting	22,000
Chemicals, plastics, pharmaceuticals, and medical equipment	14,200
Wholesale	13,500
Logistics and shipping	12,200

Source : Urssaf at January 1, 2015

GLOBAL LEADERS, BORN IN ISERE

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

2014, a trade surplus of €575 million

Source : Douanes, 09/2015

A location of choice for foreign investors

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



- 5 of the top 10 private-sector employers are foreign-owned firms
- More than 34 countries have business interests in Isère
- Isère is home to 470 foreign-owned firms that provide 41,500 jobs

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



UNITED STATES

125 companies and 13,500 jobs
Caterpillar, HP, BD, Xerox, Oracle,
Salesforce.com and GE Renewable
Energy (formerly Alstom Hydro)



GERMANY

73 companies and 4,000 jobs
Siemens, Hager Security, and
Sigma-Adrich



UNITED KINGDOM

39 companies and 3,200 jobs
Rolls-Royce Civil Nuclear, e2v, and
Nemera

Source: AEFI

International high-tech clusters



DIGITAL TECHNOLOGIES 40,000 jobs
6,800 students

Electronics and micro- and nanoelectronics

- €12bn invested since 2002
- One of Europe's five global micro- and nanotechnology clusters, covering design to application sectors
- Home to one-third of France's electronic component manufacturing jobs
- Renowned expertise in EDA and nanoelectronics design software

25,000 jobs

22,000

3,000

in private-sector companies

in government-funded research

Main companies operating in Isère: STMicroelectronics, Soitec, e2v, Sofradir, Ulis, Trixell, Thales Electron Devices, Thales Avionics, ARM, ASML Applied Materials, Tokyo Electron, Mentor Graphics, Synopsys (formerly Atrenta), Cadence, Air Liquide Electronic Systems, Lam Research, Tronics Dolphin Integration, Intel Corp (formerly Docea Power), Radiall, InvenSense (formerly Movea), Entegris and 40-30.

IT and software

- A hub for R&D in hardware-software convergence and the Internet of Things
- One-fourth of jobs in R&D (public and private sectors combined)
- A high-quality workforce: "One of the largest pools of talented engineers anywhere" Parker Harris, Salesforce.com's cofounder
- Digital Grenoble: digital dynamic ecosystem recognized as part of the French Tech initiative

15,000 jobs

13,000

2,000

in private-sector companies

in government-funded research

Main companies operating in Isère: HP, Atos/Bull, Capgemini, Xerox, Oracle, Orange L@bs, Salesforce.com, Business&Decision Eolas, Autodesk, The Mathworks, Comsol, Forgerock, Criteo, Esri, Photoweb, Kelkoo, Spartoo, Bonitasoft, CGI and Persistent Systems.

Minalogic global competitive cluster for smart miniaturized solutions, particularly applied to energy and health markets. 397 R&D projects for total spending of €2bn (incl. €768m in public funding). 300 members, including 270 companies (89% of which are SMEs).



NEW ENERGY TECHNOLOGIES

- . First time in France: deployment in Grenoble in 2015 of 21 hybrid electric/hydrogen commercial vehicles and creation of a charging station
- . Smart Grid Campus in Auvergne Rhône-Alpes Region certified "Campus of Excellence"
- . Grenoble is the world's hydro-turbine capital and home to GE Renewable Energy's global hydroelectric technology center and headquarter.

12,300 jobs
1,200 students

10,300

in private-sector companies

2,000

in government-funded research

Main companies operating in Isère: Air Liquide, Schneider Electric, GE Renewable Energy, Atos Worldgrid, Eaton, CG, EDF ENR PWT, Symbio FCell, McPhy, Siemens, Sylfen and Paxitech.

Tenerrdis competitive cluster driving the energy transition: 250 R&D projects for total spending of €1.6bn (including €517m in public funding). 190 members, more than 60% of which are SMEs.

CHEMICALS AND CLEANTECH - ECOMATERIALS

- . 80% of France's private-sector research in eco-construction, materials, and processes takes place in the Rhône-Alpes Region, with a particularly dense concentration in northern Isère
- . The area is home to 3 Seveso chemical parks with industry-leading environmental standards, integrating up to 100% of raw material flows
 - > €1bn invested between 2012 and 2017
 - > More than 100 years of expertise

12,500 jobs

11,200

in private-sector companies

1,300

in government-funded research

Main companies operating in Isère: Arkema, Air Liquide, Adisseo, Vencorex, Hexcel, Solvay, Bluestar Silicones, Tera Environnement, Ethera, Ecoat, Kernéos, Parexlanko, Serge Ferrari, Xella, Areva, Novacap, Evonik, Ryb, Artelia, Labaronne Citaf, Recupyl, Wessling, Vicat and Lafarge.

Axelera global competitive cluster for the chemical and environmental industries. 232 R&D projects certified for total spending of €725m. 315 members, half of which are SMEs.



MEDTECH AND HEALTHCARE

- . A job-creating sector: + 3,200 jobs in 15 years
- . A predominantly digital scientific hub, the only one of its kind in the world, delivering disruptive innovations
- . A strong network of support from organizations like Medic@Ips, I-Care, Tasda and Cancerpole-Clara
- . Autonom@Dom®: France's benchmark home healthcare and assisted living demonstrator
- . Grenoble University Hospital: one-stop window to conduct clinical trials

10,600 jobs

9,000 students

8,300

in private-sector companies

2,300

in government-funded research

Companies operating in Isère: bioMérieux, Roche, BD, GE Healthcare, Medtronic, Trixell, Fluoptics, InvenSense (formerly Movea), Wright (formerly Tornier), Eveon, Endocontrol, Genostar, Technidata, Maatel, Fresenius, Patheon, ARaymondLife and Biomatech.

Lyonbiopole and Minalogic global competitive clusters fostering the emergence and development of innovations in Medtech sector technologies, products and services

The Lyonbiopôle global competitive cluster: 183 R&D projects for total spending of €870m (incl. €374m in public funding). 190 members, more than 80% of which are SMEs.



One out of 5 Grenoble's inhabitant is a student

65,500 students / Grenoble-Alpes University: 50,000 students

HIGHER EDUCATION WITH A FOCUS ON THE SCIENCES AND INTERNATIONAL PROGRAMS

- . 15.4% of students are foreigners (vs. 14.5% for all France)
- . 41% of students are enrolled in science programs, especially in fundamental science and engineering
- . #1 French university outside of Paris with the most PhD students (3462)

% of PhD students by French regional education sector



Percentage of students in PhD programs

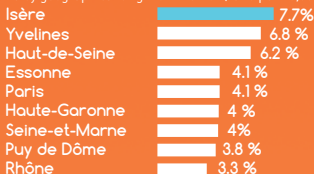
(Sources : MENESR-DGESIP-DGRI-SIES - 2014-2015)

INTERNATIONALLY-RECOGNIZED EXCELLENCE IN HIGHER EDUCATION

- ▶ Grenoble-Alpes University among France's Top 6 in 10 thematic rankings of the 36 subject areas covered by QS World University Rankings 2015
- ▶ Grenoble Ecole de Management ranked among the top 6 business schools in France, the top 20 in Europe, and the top 50 worldwide

ISÈRE, FRANCE'S MOST INVENTIVE DEPARTMENT

Number of patents by geographical origin of inventor (ratio per 10,000 inhabitants)



(Sources : INPI)



More R&D jobs than any other place in France

- . 25,000 R&D jobs, including: 15,000 jobs at gov.-funded research labs and 10,000 at private-sector R&D centers
- . 200 start-ups spun off from gov.-funded research labs in the last decade

STRONG GOVERNMENT-FUNDED RESEARCH

International, interdisciplinary and firmly focused on technology transfer to industry

► Large international scientific instruments

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

► National research organizations

CEA (The French Alternative Energies and Atomic Energy Commission)
CEN (The National Center for Snow Studies)
CNRS (The National Center for Scientific Research)
CSTB (The Center for Science and Technology for the Construction Industry)
INRA (The National Institute for Agricultural Research)
INRIA (The National Institute for Research in Computer Science and Automation)
INSERM (The National Institute for Health and Medical Research)
IRSTEA (The National Institute for Research in Environmental and Agricultural Technology)

PRIVATE-SECTOR R&D CENTERS

International companies choose Grenoble-Isère

- . HP, Xerox, Salesforce.com, Siemens, Oracle, Air Liquide, Ahlstrom Paper Group, BD, STMicroelectronics, Schneider Electric, Constellation, Orange Labs, Atos/Bull, GE Renewable Energy (formerly Alstom Hydro), Lafarge, Vicat, Soitec, Usharesoft (Fujitsu) and bioMérieux.

WORLD-CALIBER ACHIEVEMENTS IN SCIENCE

- . 3 Nobel Prizes in Physics (1961, 1970, 1985): R. Mössbauer, L. Néel, K. von Klitzing
- . 2 Nobel Prizes in Chemistry (2009, 2012): A. Yonath et V. Ramakrishnan, B. Kobilka
- . 1 Turing Award (2007): Joseph Sifakis, the only one in France
- . 1 Blue Planet Prize (2008): Claude Lorius
- . 1 Wolf Prize in Physics (1985): Philippe Nozières
- . 1 Draper Prize (2014): Rachid Yazami
- . 1 Lasker Prize (2014) and 1 Breakthrough Prize (2015): Alim-Louis Benabib

Made in Grenoble-Isère



CG, Smart Grid solution provider, is one of the 6 companies chosen by the French power grid ERDF to manufacture Linky meters.



Smart solutions.
Strong relationships.

Since the launch of the Grenoble brand in 2008, FST HANDWEAR has produced 20,000 gloves & manufactured derivative accessories (20% growth per year).



FST
HANDWEAR

With 12,000 tons per year on average over the past decade, Noix de Grenoble [Grenoble walnuts] account for a third of France's production.



With more than 500 patents, Xerox Research Centre Europe (Xerox-RCE) continues to drive global innovation in services.



Trixell supplies 90% of the world's radiology equipment manufacturers. Thales manufactures nearly 50% of the image intensifiers used worldwide.



In 2014, ARaymond produced 2 billion automotive fasteners in France: 1 billion metal clips, 750 million plastic clips and 135 million connectors, used to connect fluids such as fuel, coolant, and more.



ARaymond 
MORE THAN FASTENERS

Flagship local development projects



GIANT

(Grenoble Innovation for Advanced New Technologies)

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

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



INSPIRA

The Salaise-Sablons river port and industrial complex

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

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





An attractive commercial property market

AVAILABLE COMMERCIAL PROPERTY

- 632 hectares of commercial land
- 156,780 sq. m of office space
- 749,698 sq. m of commercial buildings, including logistics facilities

Source: AEPI, nov. 30, 2015

BUSINESS PARKS SPECIALIZING IN STRATEGIC INDUSTRIES

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

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



COMMERCIAL REAL ESTATE PRICES (new and renovated properties)

	Office space	Other commercial/ industrial space		Office space	Other commercial/ industrial space
Sophia Antipolis	180/220	90/120	Lille	130/220	39/60
Marseille	150/270	41/100	Toulouse	125/160	46/87
Montpellier	145/165	75/90	Bordeaux	128/180	42/65
Grenoble	145/160	73/82	Lyon	120/260	42/85

Prices are in € per sq. m per year, not incl. taxes and fees (source: CBRE, 06/15)

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

Quality of life, a prime advantage



SUSTAINABLE LIVING

- . Isère is home to 9 French certified "Positive energy regions for green growth"
- . Grenoble's *Caserne de Bonne* district won France's top "Ecoquartier" green neighborhood award
- . *Grenoble Presqu'île* is one of the 13 projects awarded "Ecocité" certification by the French Ministry for Sustainable Development; the project represent €1.4bn investment over ten years
- . Grenoble is the EU's second most accessible city

ACCESS TO OUTSTANDING NATURE SITES

- . 9,000 kms of signposted hiking trails
- . 1 national park: Ecrins, and 2 regional parks: Vercors and Chartreuse
- . 120 sensitive and preserved nature areas
- . 4 mountain ranges: Belledune, Chartreuse, Oisans and Vercors

RICH HERITAGE TO BE EXPLORED

- . 120 museums, castles and heritage sites open to the public
- . 6 major archeological sites such as Vienne and Charavines
- . Predominant religious sites such as *Grande Chartreuse* Monastery, Saint-Antoine-l'Abbaye Abbey and *Notre Dame de la Salette* sanctuary.





VIBRATE TO THE RHYTHM OF MORE THAN 1000 CULTURAL AND SPORTS EVENTS

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

A TASTE OF THE ART OF LIVING IN ISÈRE

- . Outdoor recreation for all tastes, winter and summer, in the mountains and plains: 22 winter sports resorts, 30 Nordic sports sites, 17 lakes and leisure centers, 5 trail running sites, 31 via ferrata trails and adventure parks, 11 golf courses, and more.
- . Regional specialties: *Noix de Grenoble* walnuts, *Liqueur de Chartreuse*, *Bleu du Vercors* blue cheese, *Saint-Marcellin* cheese, *Jambon d'Aoste* ham, *Ravioles du Dauphiné* stuffed pasta, and more.
- . Renowned gastronomy: 4 Michelin-starred restaurants, nearly 100 professionals certified "*Maîtres restaurateurs*"

NOT TO BE MISSED IN GRENOBLE-ISÈRE

- . *Grande Chartreuse* Monastery,
- . *Saint-Antoine-l'Abbaye* Abbey
- . *Choranche* caves
- . 21 bends in the road to *Alpe d'Huez*
- . Europe's largest skiable glacier in *Les-Deux-Alps*
- . First urban cable car in *Grenoble*
- . *Jazz Festival* in *Vienne*
- . *Museum of the French Revolution* in *Vizille*
- . Famous people from *Grenoble-Isère*: *Hector Berlioz*, *Aristide Bergès*, *J.F. Champollion*, *Étienne Bonnot de Condillac*, *Xavier Jouvin*, *Jean Kuntzmann*, *Olivier Messiaen*, *Emmanuel Mounier*, *Jean Pomagalski*, *Abel Rossignol*, *Stendhal*, *Jacques Vaucanson*, *Louis Vicat*, ...





5 reasons to choose Grenoble-Isère

A REGION IN THE HEART OF THE EU MARKET

- . #2 region in France with a local market of 7.5 million inhabitants
- . Located close to major decision-making centers: Paris, Lyon, Geneva
- . Europe's #1 onshore logistics platform (Saint-Quentin-Fallavier) and a multimodal industrial port area on the banks of the Rhône river (INSPIRA)

AN EXCEPTIONAL INNOVATION ECOSYSTEM

- . More R&D jobs than any other place in France
- . Grenoble-Isère, France's most inventive Department
- . International, interdisciplinary public research, firmly focused on technology transfer to industry

A DIVERSIFIED ECONOMY WITH GLOBAL REACH

- . Sectors of excellence covering three societal challenges: the information society, the energy transition and healthcare
- . A dense, diversified industrial fabric
- . Attractive for foreign investors with 4 out of 10 industrial jobs in foreign-owned companies

A HIGHLY QUALIFIED TALENT POOL

- . A world-recognized university center: 15.4% foreign students, 180 different nationalities
- . A young, educated and active population

SUPERIOR QUALITY OF LIFE

- . An appealing environment for employees and their families
- . Nature, sports and culture in the heart of the French Alps

Invest in Grenoble-Isère, France-AEPI, your partner in business and regional economic development

Customized engineering to support your projects



A local and international
business link
Prospecting new investors



A partner
in business relocation
and development



An in-house
economic
observatory



A regional
engineering and
promotion tool

Grenoble-Isère, France, the smart move
Contact us!



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