

Economic profile

20
21

**Bordeaux - Gironde
France**



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REGIONAL DYNAMICS

Gironde, 2nd ranking department for demographic growth, +20,000 inhabitants per year
Bordeaux, 1st ranking employment area after Paris for job creation in 2019 - Sept 2020 (Trendeo)
Gironde, 3rd ranking department for **job creation** in 2019 - Sept 2020 (Trendeo)
A business creation rate exceeding the average for metropolitan areas (12.2 %)

Home to more than 200 company headquarters (of +100 employees)
Capital of FrenchTech
World's leading region for AOC appellation wine production (30% of national production)
France's 3rd ranking aeronautics catchment area
Bordeaux, a leading destination for **sustainable tourism**

Growth indicators

Net salaried job creation in 2019:

- + 8,500 for Bordeaux Métropole
- +11,300 in Gironde

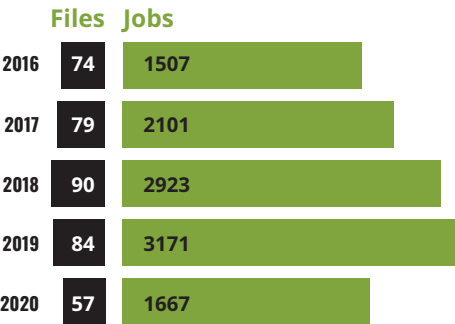
Leading sectors for recruitment:

IT, business services, health and healthcare services, trade

HR and human capital

- A rate of qualified workers (46%) exceeding European metropolis average
- Proportion of higher education graduates in the active population 25% higher than metropolis average

Inward investment track record (Invest in Bordeaux)



Main companies located in the Bordeaux region over the last 3 years with the support of Invest in Bordeaux:

Ubisoft, Deezer, Hermès, OVH, ManoMano, Microsoft, Back Market, Google, Macif direct, Sophia Genetics, BNP BDDF, Betclic Group, Mirakl, One Point, Safran Additive Manufacturing Campus, ACC (joint venture Total-PSA), Arkea, and more

	Nouvelle Aquitaine	Gironde	Bordeaux Métropole
Density (pop. /km²)	70.9	159	1 369
Population per million 2018	5,98	1,60	0,80
Average annual growth rate 2013-2018	+0.5%	+1.2%	+1.3%
Total employment 2018*	2 419 700	729 400	450 000
Employees 2019**	1 461 000	470 500	319 893
Employee growth rate 2018-2019	+1.4%	+2.5%	+2.4%
Employees 3 rd quarter 2020	1 424 000	460 000	
Number of establishments*	471 017	143 942	85 541
Industry	8,5%	5,7%	3,9%
Building	12,9%	12,3%	9,8%
Trade, transport, accommodation/catering	29,7%	28,7%	
Market services	48,9%	53,3%	
Business creation (incl. self-employed) - 2019	67 155	25 794	15 900
Growth rate 2018-2019	+15,7%	+12,6%	+9,9%

Sources: population RGP INSEE 2018- *Total employment and establishments INSEE Sîrène 2019- **Employees URSSAF 2019

7 REASONS TO SET UP IN BORDEAUX

A FRIENDLY REGION

Most popular city for Parisian executives,
Most desirable city to work in,
N° 2 for economic dynamism,
Among the top 10 European cities for economic transition,
One of the top 3 metropolises for quality of life and work

A BUSINESS REGION

TGV Paris- Bordeaux 2 hours,
4 competitiveness centres + 17 clusters,
3 major development operations : Euratlantique, Aéroparc, Innocampus.
They chose Bordeaux : Ubisoft, Deezer, OVH, Hermès, Microsoft, Mirakl, BackMarket, ManoMano, Sophia Genetics.....

A POOL OF QUALIFIED PROFILES AND TALENTS

9 engineering schools
7 business school
3rd most innovative university
100,000 students in the metropolis area
New Campuses : Junia, Elisa, Estaca, etc

INNOVATIVE SCIENTIFIC ENVIRONMENT

N°1 University for patent applications
+100 research laboratories
Robotics, immersive and VR technology, IOT and cognition, advanced materials and 3D printing, optics/laser, etc.

A GROWING REGION

20,000 new inhabitants in the Gironde every year
N°2 area for job creation 2019/2020
+10% for business creation in 2019
84 businesses located in 2019 by Invest in Bordeaux / +3,000 jobs in 3 years

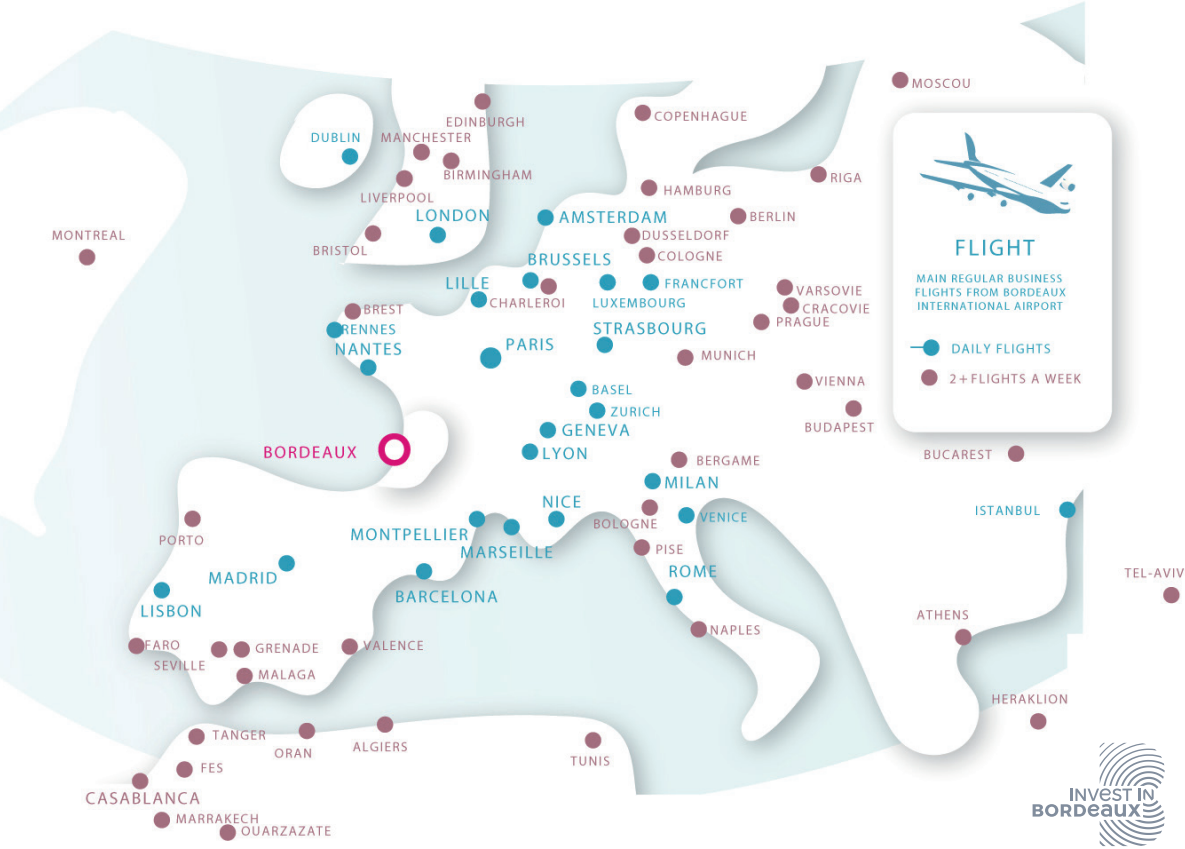
RENOWN

World n°1 region for AOC wine production
N°3 French aeronautics catchment area
N°4 city for international conferences
Around 60 cruise ship stopovers per year

A SUSTAINABLE METROPOLIS

N°1 French metropolis for quality of life
World's 6th most cycle-friendly metropolis
CHU university hospital ranked best hospital in France
N°3 French University in European ranking for most environmentally-friendly universities
55,000 ha for nature

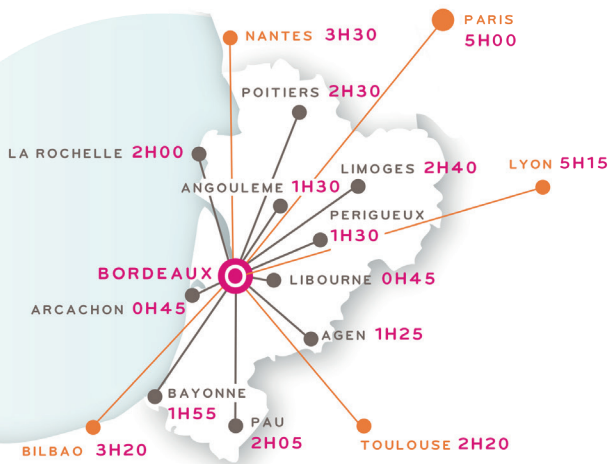
BORDEAUX METROPOLIS ACCESSIBILITY



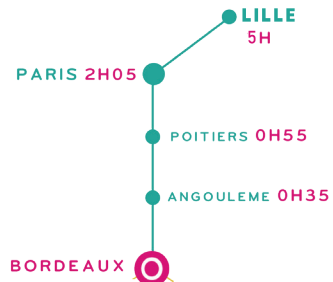
February 2020 (prior to COVID 19)



MOTORWAY



HIGH SPEED TRAIN 2017



A BUSINESS REGION

Accessibility

Bordeaux Mérignac Airport

- 7.7 million passengers in 2019
- International traffic: 60% of total
- 34 companies serving 114 destinations (February 2020)

LGV high-speed rail line Bordeaux – Paris 2h04

- St Jean train station: 20 million passengers per year
- 35 return train journeys per day
- High-speed rail links to Lille and Brussels
- 3 inter-city lines: Bordeaux/Nantes - Bordeaux/Paris/Strasbourg - Bordeaux/Toulouse/Marseille
- 15 regional express lines (TER) from Bordeaux
- Opening of regional express networks (RER) (Libourne, Arcachon, etc.)

Bordeaux is linked to a network of 10 urban areas of more than 100,000 inhabitants

- A 10 (Paris), A 62 (Toulouse), A 63 (Bayonne), A 89 (Clermont- Lyon) and A65 (Pau)

Port of Bordeaux:

- Traffic: between 7 and 9 million tonnes per year
- River port for cruise-ship docking
- Industrial and logistics platform with 7 terminals

International networks

- **56 consulates and diplomatic representatives** including the USA, UK, Germany and Spain, etc.

- **A network of cooperations and twin-towns** (Bilbao, Land de Hesse, Los Angeles, Madrid, Munich, Porto, Quebec, etc.)

- **A member of international organisations:** UNESCO World Heritage cities' club, Eurocities (network of major European cities), Ariane Cities Community, Great Wine Capitals Global Network, Club d'Affaires Russie [Russia Business Club], etc.

Business ecosystems

Business networks: FrenchTech Bordeaux, Bordeaux Place Financière et Tertiaire, Bordeaux Entrepreneurs, Clubs des Entreprises de la CCI (Bordeaux, Libourne, Médoc, Langon), Invest in Bordeaux, ADI Nouvelle Aquitaine, Syrpin, Association pour la Relation Client en Nouvelle Aquitaine

4 accredited competitiveness clusters

Aerospace Valley – (Aeronautics - Space - Embedded Systems): world hub – Europe's leading employment catchment area – 146,000 employees, 1,900 establishments, 8,500 researchers – €10bn in turnover, 3 strategic sectors: aeronautics, space and UAVs.

ALPHA RLH Photonics and Hyper-frequency waves: 100 start-ups created - 10,000 direct and indirect jobs created - 700 researchers - 200 graduates per year. A scientific facility of worldwide renown: Laser Mégajoule - 10 laboratories.

XyloFutur – Products and materials from cultivated forests: 28,300 establishments – 60,000 jobs – 200 researchers – 34 training and research centres - Turnover: €10.2bn Europe's leading cultivated forest.

AGRI Sud-Ouest Innovation: Agricultural and agri-industrial cluster for the Occitanie and Nouvelle-Aquitaine regions - France's leading agri-cluster – 220,000 jobs – 1,400 researchers - Turnover: €12bn

- **17 business clusters:** Satellite applications, drones, energy storage, eco-building, healthcare ICT, ecological transition, blue growth, wine, robotics, wind turbines, solar power, nuclear maintenance, pharmaceuticals, bio-control, etc.

- **Finance/Capital risk organisations** Public banks (Bpifrance, Banque des Territoires, Nouvelle Aquitaine Participations), guarantees and funds initiated by the Regional Authority (NACO, VitiRev, etc.), regional fund management companies (Aquitati Gestion, Galia Gestion, IRDI SORIDEC Gestion, iXO Private Equity, Newfund, etc.), capital investment subsidiaries of major banks (BNP Paribas Développement, Crédit Mutuel Equity, GSO Capital, Ouest Croissance, Société Générale Capital Partenaires, etc.), major national investors (ACE Management, Demeter, Yotta Capital Partners, etc.), business angels networks (Finaqui, Arts et Métiers Business Angels Sud-Ouest, Female Business Angels, etc.), SIE business funding bodies [social and solidarity funding], and more.

(see Funding page 21)

Host structures for companies

Bordeaux is the 3rd ranking metropolis for co-working spaces (+100 spaces)

► **8 Bordeaux Technowest incubators:** Aéroparc, Ecoparc, E-Choppe, la Place, La Source, Copernic, Newton, Food and Wine Tech

► 1 Bordeaux Unitec incubator: Sportech

► UPGRADE Nouvelle Aquitaine start-up booster

► **3 Bordeaux Unitec location sites, including La Cité Numérique** (25,000 m²)

► **SEML RDL:** Laseris, Cité de la Photonique, AMPeRIs

► **Technology parks:** Bordeaux Montesquieu and Bordeaux Unitec

► **Incubators:** Aerocampus Aquitaine, Arc Sud Développement, Talence Innovation, Ecocréative des Chartrons, Bordeaux Sainte-Croix, Bordeaux Productic, Auberge Numérique, DARWIN Ecosystème, Hauts de Garonne Développement, Sud Bassin and L'Agora (CC Estuaire)

► **Bioparc, University and University Hospital sites**

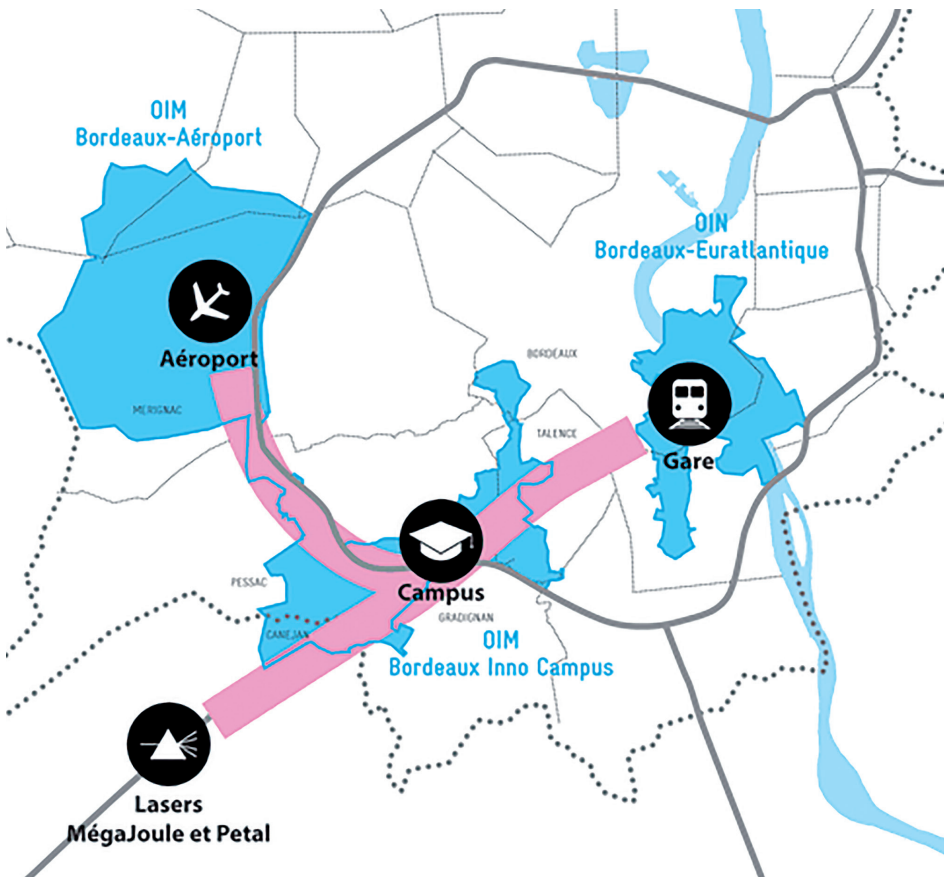
► **Gironde Synergies business park (Blaye)**

► **Sylva 21 business-industrial park (Val de l'Eyre)**

► **Local public companies:** Fabrique de Bordeaux Métropole (La Fab) - Bordeaux Métropole Aménagement (BMA)

► **A new property offer in the conurbation:** AMI AIRE ('design, innovate, re-design and execute')

3 Major Development Operations



Bordeaux Inno Campus/BIC

Health, Research and Innovation

Partnership Development Project covering 1,350 hectares

4 municipalities: Pessac, Talence, Gradignan and Bordeaux.

Partners: Bordeaux Métropole, municipalities; the French State, CHU (university hospital) and universities

Development and upgrading of facilities on the campus and hospital sites

N°3 business centre in Bordeaux Métropole: 48,500 jobs, 8 hospitals and 66,000 students.

3 excellence centres: Healthcare, Materials and Laser Optics

3 pôles d'excellence: Santé, Matériaux, optique laser

Bordeaux Aéroparc

An aeronautics excellence

eco-system

Operation of Metropolitan Interest covering 2,500ha, including 400ha for development

3 municipalities: Mérignac, Le Haillan and St Médard en Jalles

1 industrial cluster with 40,000 jobs, and a forecast rise of 10,000 jobs by 2030

Development of the aeronautics and space sector

3 programmed development operations

Tarmaq: the future centre for aeronautics and space expertise

SpaceHub: centre for excellence innovation in the space sector

Bordeaux Euratlantique

The largest urban project in France

Operation of National Interest around Gare St Jean train station, 738ha

3 municipalities in the conurbation (Bordeaux, Bègles and Floirac)

Mixed property development projects: offices, housing, facilities and parks, etc.

A business centre: Upper tertiary, creative & digital economy, eco-businesses

Deliveries: Cité Numérique, co-working spaces, MECA, Tour Innova, Quai 8.2, etc.

50,000 inhabitants, 30,000 jobs, 540,000 m² of office space, 20,000 housing units, 50 ha of green space

€5.5 billion in private & public investments

Other development operations in the metropolitan area

Bassins à Flot: between the River Garonne and the Lake, 162 ha of office space, housing, educational facilities and co-working spaces

Brazza: 53 ha in the heart of the conurbation, mixed urban development

Bastide Niel: 35 ha on the right bank, including 30% planted public spaces

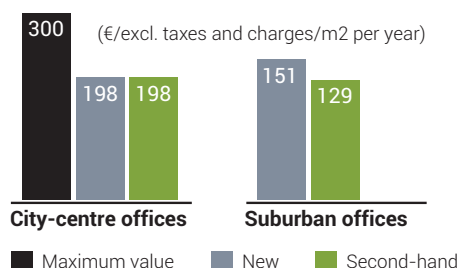
45^{ème} Parallèle: international business district in the vicinity of Mérignac airport

Property dynamics: 3rd ranking regional market

Office market

- ▶ 201,000 m² of take-up (OIEB - 2019)
- ▶ 313 transactions
- ▶ 126,000 m² 1-year offers

Office rental costs (3rd quarter 2020)



Bordeaux Campus development operation

Some forty property and development projects in public spaces, across 4 university campuses and covering more than 260 ha. 180,000 m² for renovation. 50,000 m² of new buildings. €475m in investments.

Local business and warehouse market

- ▶ 234,000m² of take-up (OIEB - 2019)
- ▶ 158 transactions
- ▶ 303,000 m² 1-year offers

COMPANIES










Among the largest employers in Gironde (number of employees)

Ariane Group	Aeronautics	3,400
Thales	Aeronautics	2,800
BNP Personal Finance	Finance	2,000
Keolis	Transport	2,500
CDiscount	ecommerce	2,200
Dassault Aviation	Aeronautics	2,400
EDF Centrale nucléaire du Blayais	Energy	1,300
CEVA Santé Animale	Health	1,000
Construction Navale de Bordeaux	Shipbuilding	1,000
AIA - Atelier Industriel de l'Aéronautique de Bordeaux	Aeronautics	1,000
GT Solutions	Logistics	1,000

Major French industrial groups are present



Main international groups

- 
Germany:
 Merck, KSB, Dekra Automotive Solutions, groupe Schunk
- 
Japan:
 Furuno, Kurita
- 
Belgium:
 Dedalus Healthcare Etex, Solvay
- 
The Netherlands:
 Stelia Composites, Nouryon
- 
Canada :
 Magma, Vermilion
- 
Scandinavia:
 Ahlstrom Paper Group, Recipharm, Yara, Valmet...
- 
USA:
 Stryker Spine, IBM Corp, Mondelez, PNY Technologies, Ol Manufacturing, Steris Surgical Corporation, Mylan, Zimmer Spine, Thermo Fisher Scientific
- 
Switzerland:
 Lindt, Nestlé, Sopra Group, Sophia Genetics...
- 
UK, Ireland:
 Milleis, Maincare Solutions, Smurfit Kappa, Sage

INNOVATION

Leading French university for patent applications (INPI ranking 2020)

3rd French university in the European ranking of eco-friendly universities

Location of the Microsoft AI School and Microsoft Experiences Lab

Nouvelle-Aquitaine '**Usine du Futur**' programme (720 companies incorporated since 2014)

Innovation support bodies: SATT Aquitaine Sciences Transfert, ADI Nouvelle Aquitaine and ADERA

Start-up eco-system

- Bordeaux: 3rd region for employment after Paris and Lyon for the number of start-ups (2019)
- **Start-ups emerging from Bordeaux-based research:** Fine Heart, Oliikrom, Poietis, Hace, Tree Frogs Therapeutics, etc.
- Strong presence of start-ups in the Winetech, Foodtech, Edtech and Fintech sectors
- Capital raised by Gironde-based start-ups in 2019: €57.3 million
- **Participatory funding:** Bordeaux Gironde Funding Lumo, Solylend, Hello Asso, Happy Capital, Tudigo, etc.
- **Support structures:** Unitec, Bordeaux Technowest, Technopole Bordeaux Montesquieu
- The **French Tech Central** tailored support programme for start-ups
- +20 business boosters and incubators

Innovation centres for start-ups

- La Cité Numérique/L'Auberge Numérique
- **Incubators:** Le Campement (Darwin), eco-creative incubator, Arc Sud Développement, Talence Innovation, Hauts de Garonne, Sud Bassin, L'Agora (CC Estuaire), etc.
- La Banquiz, booster for digital start-ups in the software and open-source sector
- **Innovation boosters:** Héméra, 1Kubator, 33Entrepreneurs, Snark Factory, Digit 'Halles, e-business hub
- Up Grade Nouvelle Aquitaine start-up booster, Croissance Premium (Region, ADI, CCI)
- **Corporate incubators:** Startup Booster and The Warehouse (Cdiscount), Theophraste (Sud-Ouest), Village by CA, Popup by Veolia, Fayat Accélération Startup (FAST), CEBLab, etc.
- **Higher education institution incubators:** (INSEEC, Kedge, UBee Lab, Digital Campus, Bordeaux INP)
- Sportech, sports incubator
- SATT Aquitaine Sciences Transfert incubator
- Les Premières Nouvelle Aquitaine incubator
- Factory Lake, the first shared industrial spaces (2021)

Social and Inclusive Economy (SIE): a new development model

- 10% of jobs in the metropolitan area (35,000 employees), 54,000 jobs in Gironde
- Around 3,000 employer organisations (non-profit groups, cooperatives and foundations, etc.)
- SIE inter-university network
- Master in Strategies, Regions and Innovative Projects for the Social and Inclusive Economy.

SIE Actors

- CRESS, SIE Regional Chamber
- Coopérative des Tiers Lieux (280 in Nouvelle Aquitaine)
- ATIS, social innovations incubator
- SCOP Nouvelle-Aquitaine
- La Ruche, national network of incubators for responsible companies
- HelloAsso, funding platform for the charity sector in France
- GEEV: Collaborative platform for food and other donations
- SocialLAB Rive droite
- France Active Nouvelle Aquitaine
- Réseau d'Economie Circulaire et d'Innovation de la Nouvelle-Aquitaine

Clusters, support for innovation

- **Aeronautics and space:** Aerospace Valley, Aerocampus Cluster, AETOS (drone systems), TOPOS (satellite applications)
- **Digital:** Digital Aquitaine, Naos (open-source software), Bordeaux Games, EdTech, Aquitaine Robotics, Club Commerce Connecté, Smart4D, CATS - Cluster Aquitain du Transmedia Storytelling
- **Healthcare:** GIPSO, ALLIS NA
- **Eco-friendly activities:** Aquitaine Chimie Durable, SOLTENA (ecological transitions), ODEYS (sustainable building), XyloFutur
- **Energy:** Energie et Stockage, Cluster éolien [wind turbines], Sysolia (industrial solar systems), E-Clide

- **Laser Photonics:** ALPHA RLH Photonics and Hyper-frequency waves
- **Agri-food / wine:** Agri Sud-Ouest Innovation, Inno'vin (wine sector), Biocontrôle et Biosolutions cluster
- **Shipbuilding:** Bordeaux SuperYachts Refit

Excellence in scientific research

- **5th most innovative French university** (Reuters)
- **Research excellence fields:** neuroscience, healthcare technologies, materials of the future, optics/laser, cardiology, archaeology, digital and systems certification, environment and climate, intelligent transport
- **Shanghai ranking:** On a world ranking, Bordeaux University holds 66th place in the 'engineering science, IT and technology' category
- **Presence of major national research centres:** CNRS, INSERM, INRAE, INRIA, IRSTEA, INRETS, IFREMER, CEA, Institut d'Optique Graduate School, Institute of Vine & Wine Science (ISVV), etc.
- **Bordeaux University Foundation**
- Cognitive Science & Technology Chair (IBM, ENSC)
- Science & Technology for Digital Transformation Chair (Arts et Métiers – ENSAM)

Major private R&D centres located in Bordeaux area

- ArianeGroup, Thales, Dassault
- CEA/CESTA
- EUROVIA, world centre
- LECTRA
- LYRE, Suez
- JointLab: L'Oréal, Laboratoire Chimie Polymères
- MERCK
- SAFT, world research centre
- SOLVAY, Laboratoire du Futur
- PSA-open Lab Competitive Intelligence
- EVBox, an Engie subsidiary

Bordeaux University, Science and Technology

- **'Initiatives d'Excellence'** certification, €700m in investment
- +4,000 teachers and researchers, +800 international researchers
- +2,000 PhD students, 8 doctoral schools
- 11 research departments, 70 research units
- 450 collaboration contracts between the University and companies in 2019
- 60 research-based start-ups created in the last 10 years

Michel Montaigne University, humanities, languages and civilisations, territories and communication

- 700 teacher-researchers, 650 PhD students per year
- 16 research units
- 100 research programmes per year
- 1 excellence laboratory in archaeology, LasCarBx
- 'Montaigne-Humanités' doctoral school

IDEX Bordeaux, Excellence Initiatives

- **Investment programme** for the development of Bordeaux University in partnership with the CNRS and INSERM, Bordeaux INP, Sciences Po Bordeaux, Bordeaux Montaigne University, Bordeaux Sciences Agro, INRA, INRIA, CEA, IRSTEA and Bordeaux University Hospital.
- **8 scientific excellence fields:** archaeology, neuroscience, society and healthcare, healthcare technology, digital science, materials of the future, environment and climate, optics-photonics-laser

Technology Transfer structures

- Société d'Accélération du Transfert de Technologie (SATT), Aquitaine Science Transfert
- ADERA (innovation and research partnership)
- CEA Tech Nouvelle Aquitaine
- **4 certified Carnot Institutes** (lipids for healthcare, energy, environment, ICT), Tremplin Carnot Cognition
- **Technological resource centres:** AGIR and ITERG (agri-food, healthcare, cosmetics), Rescoll and the CANOE platform (composites), Alphanov (laser), FCBA (wood building), CRT Nobatek (technology and sustainable building), CATIE (Aquitaine Centre for information and electronic technology)
- **INRIA Bordeaux:** STIP, innovation and partnership transfer service
- **INRAE Transfert:** engineering company for innovative projects in nutrition, agriculture and environment

TRAINING

Higher education represents:

137,000 students in the academy, including 77% in Bordeaux Métropole

56.1% of students enrolled in degree courses, 27.5% in masters and 6.7% in doctorates

+30,000 new university graduates per year across the 2 Universities of Bordeaux

Institut National Polytechnique (Bordeaux INP), 9 public engineering schools in Nouvelle-Aquitaine:

3,400 students, 900 graduates per year, 20 engineering specialisations including 5 via apprenticeship, 20,000 graduates

Bordeaux universities

Bordeaux University:

► 56 000 étudiants, 3^{ème} de France, dont 7 200 étu56,000 students, 3rd University of France, including 7,200 foreign students

► Science & technology - biology - medicine - law - political science - management & economic science - human & social science - business administration

Bordeaux Montaigne University:

► 17,600 students, including 2,100 foreign students, 138 national diplomas, 24 languages taught, 3 research & training units (UFR): Humanities, Languages and civilisations, and Territorial and communication science,

► **2 institutes:** IUT Bordeaux Montaigne and the Institut of Journalism Bordeaux Aquitaine (IJBA)

► National Graduate School in Environment, Georesources and Sustainable Development Engineering (ENSEGID- INP)

► National Graduate School for Industrial Performance and Aeronautics Maintenance (ENSPIMA-INP)

► Bordeaux Arts et Métiers Paris-Tech (ENSAM)

► National Graduate School for Agricultural Sciences of Bordeaux (BSA)

► Institut d'Optique Graduate School (IOGS)

► Campus Center for Higher Industrial Studies (CESI Bordeaux)

► ESME Sudria

► Ten private digital engineering schools

New engineering and/or higher education institutes

► 3 new aeronautics engineering schools: Elisa Aerospace Bordeaux, ENSPIMA and ESTACA

► Ecole IA Microsoft (engineer and technician levels)

► Campus Bordeaux Lac

► Campus de Junia Bordeaux (2 preparatory programmes for entry to higher schools)

► School for Artistic Professions (ESMA)

► Culinary Institute of France

► SNCF (French railway company) Réseau Training Centre

7 Business schools

KEDGE, INSEEC, ESG, ESSCA, ISG, IDRAC Business School, ISEG Marketing & Communication

Higher Education Institutions

Bordeaux Political Science Institute, Bordeaux School of Architecture and Landscape, French National School for the Judiciary, Maritime Affairs Schools Group, Bordeaux Journalism Institute, Bordeaux Art School, Chartrons Campus schools, Galiléo Studialis, ...

Engineering schools in Bordeaux Métropole

► National Graduate School of Chemistry, Biology and Physics (ENSCBP- INP)

► Bordeaux National Graduate School of Electronics, Information Technology, Telecommunications, Mathematics and Mechanics (ENSEIRB - MATMECA - INP)

► Bordeaux National Graduate School of Biomolecule Technology (ESTBB - INP)

► Bordeaux National Graduate School of Cognitive Engineering (ENSC - INP)

International training programmes

► +40 international training programmes (degree, master and PhD)

► 700 partner universities in 80 countries

► Leading French university for the number of Erasmus Mundus certified programmes

► 1 international school - BIS (Bordeaux International School)

► High school international streams - OIB - International Option in the Baccalaureate

THE KEY SECTORS IN BORDEAUX & GIRONDE



HEALTHCARE

60 000
jobs*

N°1 University hospital in France

E-health, medical devices,
pharmaceutical

* private & public jobs



WINE

35 000
jobs

N°1 region for AOC
wine producing region
Vinexpo, the international
wine & spirits trade fair



DIGITAL

32 000
jobs

French Tech capital

N°3 metropolis for video games

Connected business, intelligent
transport, virtual reality, big
data, AI, robotics



TOURISM

23 000
jobs

4th most visited department
for French tourists

N°4 French city for international
conferences

Wine tourism, e-tourism, cruise
ship stopovers, Cité du Vin



AERONAUTICS/SPACE / DEFENCE

26 000
jobs

N°3 French employment
catchment area
"Aerospace Valley" international
centre

Major players : Airbus,
Dassault, Thales, Safran...



CHEMISTRY/ MATERIALS

12 000
jobs

460 establishments, 3 centres:
Xylofutur, Aerospace Valley,
Route des lasers/photronics

Green chemistry, ceramics,
carbon fibres, nanomaterials,
bio-sourced materials, etc...



FINANCE/ INSURANCE

21 000
jobs

N°4 banking centre: +10
international banks, inter-
regional headquarters,
merchant banks

Key Fintech location



AERONAUTICS/SPACE/DEFENCE

Aerospace Valley, international competitiveness cluster for aeronautics, space and embedded systems

Leading European eco-system

ALPHA – Photonics and Hyper-frequency waves, the French hub for waves and innovation

Gironde, the 3rd largest employment basin in France, +26,000 jobs, €2bn in turnover

3rd largest regional export sector

Civil and military aeronautics programmes: Falcon, Rafale, helicopter engines, ATR airfoil, Airbus, etc.

2nd largest region for weapons industry

Leading national centre for maintenance in operational condition (MOC)

Aerocampus: 1st 'aeronautics and space campus' for training in aeronautics professions

Tarmaq: the future centre for aeronautics and space expertise

SpaceHub: centre for excellence innovation in the space sector

3 clusters: AETOS (drone systems), Aquitaine Robotics and satellite applications (TOPOS)

Industrial investments: AirbusGroup, Thales, Dassault, Sabena Technics, Safran Additive, Flying Whales, etc.

Bordeaux Métropole, president of **Ariane Cities** in 2020

OMI Bordeaux Aéroparc: host sites for businesses

Events: UAV Show Europe (leading European drone fair), ADS Show (international fair for military aircraft maintenance),

MAELE initiative (Light and environmentally - responsible air mobility)

Leaderships

► **Energy, propellant and motorisation:** solid-propellant rocket engines, propellant systems, fragmentable propellant, specialised batteries, etc.

► **Mechanics and materials of the future:** thermal nozzles and shields in thermodynamic composites, high-performance composites, energy materials, etc.

► **Photonics-optics-laser**

► **Embedded electronics and simulation:** cockpit systems, VD screens, surveillance systems, radar, etc.

► **Civil drones:** solutions for civil use, Drones for Life consortium

► **Military and civil aircraft maintenance (MOC)**

► **Tests:** simulation of atmosphere re-entry, propellant tests, zero-gravity space surgery, CESA drones

► **Manufacturing of additives**

Training

► **NAASC (Nouvelle-Aquitaine Academy Space Center):** University space centre, in association with 5 major schools

► **European-certified Master in Engineering (CMI) and Systems Maintenance for Aeronautics** (Bordeaux University)

► **National Graduate School for Industrial Performance and Aeronautics Maintenance (ENSPIMA-INP)**

► **Bordeaux Arts et Métiers Paris-Tech (ENSAM)**

► **Aerospace Sciences Engineering School: ELISA** Aerospace Bordeaux (600 students)

► **Ecole ESTACA:** A new transport systems campus in 2021 (700 student engineers)

► **Aérocampus Aquitaine:** from high-school professionalisation to engineering diplomas (300 students)

► **Evering:** training institute for aeronautics and maintenance

Research

► **More than 2,500 people devoted to public and private R&D,** 10 public research laboratories

► **Bordeaux University:** 'Engineering & Digital Science' and 'Material Science' departments

► **MIB** (Materials and Systems Institute of Bordeaux) and its 9 research laboratories

► **The Institute of Mechanical Engineering (I2M)**

► **INRIA Bordeaux Sud-Ouest:** Expertise centre in ICT for embedded systems

► **IRT St Exupéry** for materials of the future

Sector organisations

► **BAAS:** Bordeaux Aquitaine Aéronautique et Spatial

► **Bordeaux-Technowest**

Leading companies

► **Builders:** ArianeGroup - CEA - Dassault Aviation - Dassault Falcon services - Roxel Propulsion - Safran Ceramics - SERTA - Stelia Composites - Stelia Aerospace - Thales - Safran Additive Manufacturing Campus

► **Drones:** Air Marine - Azur Drones - Dronisos - Fly-n-Sense - Drones Protect system - Robotics Industry - SkyBlrds View

► **Maintenance:** AIA (Atelier Industriel de l'Aéronautique) - Dassault Falcon Service - Sabena Technics - SIMMAD - Catherineau

► **Tests:** DGA missile tests, DGA in-flight tests

DIGITAL

Bordeaux, Capital of FrenchTech

Centre for digital excellence: Digital Aquitaine

More than 32,000 digital jobs in 4,700 companies

3rd employment area for job creation in the digital sector (2019 Trendeo)

3rd employment area for the number of jobs in digital activities

1st in healthcare IT

2nd French ecosystem for open-source software

3rd metropolis for call centres, telecom and IT services

8 clusters: ICT Health, NAOS (open-source software), TOPOS (satellite applications and intelligent transport), Club Commerce Connecté, TransMedia storyTelling (CATS), Aquitaine Robotics, EdTech éducative, Bordeaux Games

Dedicated sites: Cité Numérique, Unitec, Bordeaux Technowest, eco-creative incubator, Darwin, etc.

Events: Fintech Summit, La Grande Jonction, Cartoon Movie, it3D Summit, NAIA, Robocup

Training centre for Artificial Intelligence (Microsoft)

Leaderships

- e-health (see healthcare page)
- e-business
- Cyber security
- Open-source software
- New mobilities, intelligent transport
- Virtual & augmented reality/video games
- Big Data – Artificial Intelligence

Training

- **National Polytechnic Institute (INP) and its engineering schools (ENSC, ENSEIRB-MATMECA, etc.)**
- **Chartrons campus:** 32 schools specialising in digital sciences
- **New School for the Image Professions (ESMA)**
- Open Source School
- **Higher School for Digital Technologies (ESD)**
- **3IS School (International Institute of Sound & Image)**
- **AI Microsoft School, Campus du Lac**
- **Data Science Institute** - 1st private school specialising in data science
- **4 coding schools**

Research

- **+20 public or private research centres and laboratories**
- INRIA Bordeaux, Research Institute for Digital Science
- LaBRI - Bordeaux-based IT research laboratory
- IMS Institute of Integration from Materials to Systems
- LP2N: Photonics, Digital & Nanoscience Laboratory
- **Innovation booster:** CATIE (Aquitaine Centre for Information and Electronics Technologies)
- **Mobility and intelligent transport chair (ENSEIRB-MATMECA)**

Digital eco-system Actors

FrenchTech, Digital Aquitaine, Bordeaux Games (+50 companies), Aquinum (association of digital professionals), Naos (cluster for open-source technology), Clusir Aquitaine, SYRPIN, SYNTEC

Leading companies

- **E-business/customer relations:** Cdiscount - Back Market - Betclik Group - Mano Mano - Mirakl - Displayce - Feed Manager, etc.
- **Cyber security:** Tehtris, Eshard, F-Secure, Advens
- **Intelligent transport:** BMIA - Co-rider - IXXI - Park and Trip - Qucit - SA Gertrude, etc.
- **Virtual/Augmented reality:** XYZ - Immersion - I2S - Lumiscaphe - Stantum - VR, etc.
- **E-learning and serious games:** ADDEO - Dipongo - Libcast - IDSC Group - Stantum - Interaction Healthcare - CCCP - Enovation Solutions
- **Video games:** Ubisoft - Asobo Studio - Motion Twin - Shiro Games - Playwing - Playsoft Games
- **Audio-visual/Animation:** Solidanim, Umanimation, Sun Creature, Tsunami Studio, Un je ne sais quoi
- **Multi-media/Music:** Deezer, Music World Media
- **Big Data/AI:** Ezakus - @t Internet- Xiti - Dolist - Do You Dream Up - Cartegie - FieldBox.ai - Cheops Technology - Cogniteev - Wiidii - Clay - Jobijoba - Addinsoft - Geosat - 10H11, etc.
- **Connected objects (IOT):** NFC-I - BeTomorrow - Ubleam - Marbotic - InfleXsys
- **Robotics:** Aerospline - Vitirover - VLM Robotics- Lucas Robotics - Robotics Industry- Génération Robots - HumaRobotics
- **Mobile applications:** Aquitem - @t Internet - Blookup - Snapp
- **Open-source software:** Ekylibre- Enovation- Metapolis- Pollen Robotics- Temesis - Ullo - MapoTempo, etc.
- **Digital services:** Alten - Atos - Capgemini Sogeti - CGI - IBM - HQ of Cheops Technology and Aquitaine Valley - SQLI - Steria Sopra - One Point - GFI - Scalian - Akka technologies - Groupe Talan - Google - Microsoft

HEALTHCARE INDUSTRY AND E-HEALTH

Bordeaux Métropole, a laboratory for the healthcare technology of the future

+60,000 jobs in the healthcare sector

Excellence sectors: pharmaceuticals, biotechnology, e-health and medical devices

Pioneering region in the Silver Economy

Branch of the international competitiveness cluster **Cosmetic Valley**

Centre: Alliance Innovation Santé Nouvelle Aquitaine (ALLIS NA – pharmaceuticals, e-health, medical devices, etc.)

Creation of an innovation circle at CHU Bordeaux hospital

3 clusters: TIC Santé (DA Digital Aquitaine), GIPSO (pharmacy) and Réseau du Dispositif Médical [medical devices network]

CHU Bordeaux university hospital: N°1 ranking for the best hospitals in France (Le Point 2020)

Main therapeutic fields: neuro-science, cardiology, oncology, epidemiology

An industrial research centre: Ceva, Sanofi, Mylan, Merck, Acteon, etc.

Sites: Bordeaux InnoCampus, Technopole Montesquieu, Bordeaux Unitec, CHU

Invivox: world platform connecting surgeons and healthcare specialists

Industrial leaderships

- ▶ Pharmaceuticals and animal health
- ▶ Medical devices, bio-materials and implants
- ▶ E-health, including hospital IT
- ▶ Laser bio-printing technology
- ▶ Cell therapy

Training

- ▶ Bordeaux University: 19 specialties, 280 diplomas
- ▶ University Diploma (UD) in telemedicine 1st UD in France
- ▶ Bordeaux National Graduate School of Biomolecules Technology (ESTBB – INP)
- ▶ Bordeaux Institute of Industrial Pharmacy - IPIB
- ▶ Institute for Public Health, Epidemiology and Development – ISPED
- ▶ National Graduate School of Cognitive Engineering – ENSC
- ▶ Bordeaux School of Neurosciences
- ▶ Inter-university diploma in Laser & Medicine

Research

- ▶ **2,500 researchers**, including 700 in neuro-science and 150 in cardiology
- ▶ 35 research laboratories, 11 platforms, 2 doctoral schools
- ▶ **CHU Bordeaux**, university hospital: 294 researchers and 4,700 scientific publications
- ▶ **National Institute for Health and Medical Research** – INSERM
- ▶ JointLab laboratory with L'Oréal and LCPO
- ▶ **Neuro-sciences:** Neurocampus, Labex Brain
- ▶ **Cardiology:** Liryc (IHU) University Hospital Institute, EquipEx MUSIC
- ▶ **Medical devices:** Labex Trail and EquipEx PETAL, specialists in medical imaging
- ▶ **Oncology:** Bergonié Institute, Cancéropôle du Grand Sud-Ouest

▶ **e-health:** INRIA, Labri

▶ **Human nutrition:** Institut Carnot 'Lisa' (nutrition, health, lipids), Research Institute in Human Nutrition, Institute for Fats and Oils

Sector organisations / Transfer

- ▶ Interprofessional Grouping for the Pharmaceutical and Health Industries of the South-West – GIPSO
- ▶ Nouvelle Aquitaine Health Innovation Alliance (ALLIS NA)
- ▶ Bordeaux Centre for Functional Genomics - CGFB
- ▶ Technological Platform for Biomedical Innovation - PTIB
- ▶ Bordeaux Imaging Center (platform) – BIC
- ▶ MATWIN: French platform for open innovation in oncology
- ▶ BIPSA (Bio-Imagery, Photonics and Healthcare)

Leading companies

- ▶ **Pharmaceuticals:** Bertin Pharma - Boiron - Ceva Santé animale - Creapharm - Mylan - Merck - Recipharm - Sanofi - Unither
- ▶ **Medical devices:** Acteon - Exactech - FineHeart - HyPrevention - Implanet - InHeart - Novaptech - PolymerExpert - Steris - Stryker
- ▶ **Biotech:** Ademtech - Aelis Pharma - Fermentalg - Imagene - Poietis - TreeFrogs Therapeutics - Ysopia Bioscience, etc.
- ▶ **e-health:** Dedalus - CIS Valley - eDevice – DESKI - Nomadeec by Exelus - Lucine - Maincare France - Meditec - MirambeauAppcare - Sophia Genetics - Interaction Healthcare/SimforHealth - Satelia Medicine - Synapse Medicine - MySofie - Invivox, etc.
- ▶ **Nutrition:** Activ-inside - Nutrikeo - Vitagermine
- ▶ **Cosmetics:** Herbéo - NoxiDoxi - Omum - Panther - ADOPT - Exinnov
- ▶ **Silver economy:** Marguerite- Alogia - Linestie -Ernesti - Sunday

ENERGY - ENVIRONMENT

A favourable environment for the development of renewable energy

4 energy clusters: Wind turbines, Sysolia (industrial solar systems), energy and storage, E-Clide

SOLTENA cluster (Solutions for ecological transition in Aquitaine)

Energy sector: 30,000 jobs and 1,300 establishments in Nouvelle-Aquitaine

4th ranking employment area (excl. Paris region) for net 'green' job creation (2009-2019)

With **100 investment projects in green sectors**, 2,240 jobs created in the last 10 years

2 Nouvelle-Aquitaine 2020-30 roadmaps: **Neo Terra** for energy transition and **Hydrogen**

H2Bordeaux project (Port de Bordeaux)

Fields of expertise: solar energy, hydrogen, bio-energy, energy storage

26.2% of regional electricity production from renewable sources (2020)

Leading regional producer of solar energy and for solar power installed in 2020

Leading region for bio-energy electricity production

France's largest bio-energy park

Dedicated sites: AMPERIS, Ecoparc, Parc Newton, Copernic, Technopole Montesquieu, Agora, etc.

Natural resources: Europe's largest cultivated forest, solar and hydraulic potential, biomass, geothermal, etc.

Technological solutions for **future energy** (advanced materials, digital and electronics, etc.)

Leaderships

- Organic and hybrid photovoltaic energy
- Batteries and energy storage
- Hydrogen
- Tidal energy (SENEOH Experimental test site for estuary tidal power)
- Nuclear maintenance

Training

- National Graduate School in Environment, Georesources and Sustainable Development Engineering (ENSEGID- INP)
- Bordeaux National School of Architecture and Landscape – ENSAP
- National Graduate School of Chemistry, Biology and Physics - ENSCBP
- 'Science & Environment' doctoral school

Research

- 250 researchers and PhD students, 20 research laboratories
- **INRAE Bordeaux**, plant, ecological and environmental science
- **2 Carnot institutes:** ISIFOR (Sustainable Engineering for Fossil Fuels) and IRSTEA (Research Institute for Environmental Science & Technology)
- **4 green chemistry/photovoltaic/ materials university laboratories:** ICMCB, IMS, IPREM, LCPO
- Nobatek /INEF4 - National Institute for Energy & Environmental Transition in Building
- LabEx COTE (interaction between forest, farm and coastal ecosystems)

- OASU - Land, Marine & Planet Observatory (300 researchers)

- EGID Institute (Environment, Geo-engineering & Development)

► **Technology platforms:** Alphanov, CEA Tech, ITERG / CEDOP, CANOE (advanced materials and composites), Xyloforest (INRA), APESA, ChemInnov, FCBA (technological institute for forestry, cellulose, wood-building and furniture)

- European Institute for the Environment of Bordeaux

Sector organisations

- Pôle Environnement /Eau Nouvelle Aquitaine [water/environment centre]
- **SOLTENA cluster** (Solutions for ecological transition in Aquitaine)
- France Bois Forêt
- 4 energy clusters

Leading companies

- **Major groups:** Arcelor Mittal - RTE - ENGIE - Storengy - Nouryon - EDF
- **Renewable energy:** ADV Tech - Base Innovation - Hace - Énergie de la Lune - HDF Energy - Inélia - Instream - Moon - NewHeat - Pragma Industries - Smurfit Dalkia - Sunna Design - Valorem
- **Energy storage:** EvBox-Exoes-Greenspot-Lafon technologies - SAFT - BMS PowerSafe - Nexeya - Neogy - St@rttec- E4V - GazelleTech - SwitchESS
- **Engineering:** Cap Ingelec - Serma group - Bertin technologies - EDEIS - Amoes - Alto step
- **Water-Air:** Greease - Synthea - Kipoplue - Taso - Chromatotec - Tergys

CHEMISTRY - MATERIALS

3 competitiveness clusters: Xylofutur (products and materials from cultivated forests), Aerospace Valley, Elastopole (rubber and polymers)

3 Clusters : Odéys (eco-building, sustainable housing), Aquitaine Chimie Durable, SOLTENA (ecological transitions)

12,000 employees in Gironde, 460 establishments, 17 establishments with more than 100 employees

International private R&D centres: Arkéma, ArianeGroup, Eurovia, Saft, Suez (Lyre), Smurfit, Veolia, Pôle Innovation de Solvay

Among the top **3 French regions for the number of researchers** in materials science and physical chemistry

Internationally renowned public research laboratories in the fields of materials, the environment, polymers, analytical chemistry and industrial safety

Leaderships

- ▶ Waste, water and industrial discharge treatment
- ▶ Wood building
- ▶ Ligno-cellulosic chemistry
- ▶ Chemistry for energy
- ▶ Agri-chemistry
- ▶ Micro-algae, plant extraction
- ▶ Fuels, explosives

Training

- ▶ National Graduate School of Chemistry, Biology and Physics (ENSCBP- INP)
- ▶ National Graduate School of Biomolecule Technology (ESTBB - INP) ENSTBB
- ▶ National Graduate School for Agricultural Sciences of Bordeaux (BSA)
- ▶ Master in Sustainable Forest Management
- ▶ Chemical Science doctoral school

Research

- ▶ The European Institute of Condensed Matter Chemistry of Bordeaux (ICMCB)
- ▶ Institute of Molecular Science (ISM)
- ▶ European Institute for Chemistry & Biology (IECB)
- ▶ The Institute of Materials and Systems Integration (IMS)
- ▶ Paul Pascal Research Centre (CRPP)
- ▶ The Laboratory of Thermo Structural Composites (LCTS)
- ▶ The Laboratory of Organic Polymer Chemistry (LCPO)
- ▶ The Institute of Mechanical Engineering (I2M):
- ▶ ITERG - Cedop The European Centre for the Development of Oil Products (ITERG -Cedop)

Technology transfer

- ▶ CANOE - Nouvelle-Aquitaine Technical Centre for Composites & Advanced Materials
- ▶ RESCOLL, Technological Resource Centre in the field of adhesion and assembly with glue, polymers and materials
- ▶ ChemInnov Platform
- ▶ FCBA - The Institute of Technology for Forest-based and Furniture Sectors
- ▶ Xylochem

Sector organisations

- ▶ France Chimie Nouvelle-Aquitaine
- ▶ Aquitaine Chimie Durable
- ▶ **SOLTENA cluster** (Solutions for ecological transition in Aquitaine)

Leading companies

- ▶ **Waste treatment & recycling:** Bee&Co, Bigarren Bizi - Europlasma - MALTHA Glass Recycling France - L'Electrolyse - Pena - Syneox SIAP - INERTAM - SIAP PROCINER (SARPI-VEOLIA) -ASTRIA, Bio-Tox - Alcion Environnement (Groupe SEDE Environnement), etc.
- ▶ **Green chemistry:** Bertin Technologies - Biolandes - Diester Industrie - Exinnov - Fermentalg - Immunrise - Polyrise - Olikrom - Solvay
- ▶ **Fine chemicals:** Arkema - Laffort Cœnologie - Solvay -Sanofi -Nouryon - Novéal - DRT -Groupe Berkem - Firmenich
- ▶ **Composites, polymers:** AEC Polymers - PolymerExpert - Rescoll - Platinova - Epsilon Composites - Simorep & Cie (Michelin) - MLPC International - SAFRAN - Soficar Groupe - Stelia Composites - Strato Compo - Toray Carbon Fibers Europe -NATEC, etc.
- ▶ **Sustainable buildings:** BackPlan - CSI (Soprema)- IQSpot - Qucit -TEEO - MyOlympe - Vertige - Woodscope

WINE

World's leading region for AOC wine production (Protected Designation of Origin)

30% of national production, 65 AOC areas

N°1 Organic AOP Wines (volume & sales value)

With 110,800 ha of vineyard, the Gironde department is France's leading organic wine producer.

Organic vineyard surface has increased fourfold in 10 years.

7,200 wine estates, 5,700 growers and 9,000 château names.

A turnover of €4bn, of which half is generated by

export sales (Hong Kong, China, USA, UK, etc.)

The leading employer in Gironde

55,000 direct & indirect jobs, including 5,900 seasonal workers

5 million hectolitres harvested on average (**666 million bottles** per year)

20 bottles of Bordeaux are sold every second across the world

300 trading companies, 75 brokers or agents

A participatory funding platform, **Winefunding**, the first equity crowd-funding platform

Innovation

► 1st incubator geared towards vine, wine and wine tourism start-ups (Château le Sartre, Bernard Magrez)

► **Bordeaux INNO'VIN cluster**

► The Institute of Vine and Wine Science, excellence centre in research for the wine sector

► **Winetech**, a support structure for companies, based in Libourne (Technowest)

► **Academic expertise:** oenology, grape & process biochemistry and grape & wine microbiology

► The Institute of Vine and Wine Science (IFVV)

Events

► **Vinexpo Bordeaux** - international wine & spirits trade fair - an international brand

► Wine Paris & Vinexpo Paris, Vinexpo Hong Kong, Vinexpo New York

► **Vinitech- SIFEL** - international trade fair for the wine, arboriculture and vegetable sectors

► Salon des Vins des Vignerons Indépendants

► Salon **Vinibio**

► **The Barriquades** - The Gourmet Market of Bordeaux Organic Wines

Training

► KEDGE Business School Wine & Spirit Academy

► KEDGE Wine School, Wine & Sustainability (2021)

► INSEEC Bordeaux

► IPC - Wine & Spirit Sales

► International School for Cellar-masters (CIVB)

► Best - Worldsom, cellar-master excellence programme

► European Master in Oenology & Wine Production, Master in Wine Law

► Master WINTOUR, Erasmus Mundus in wine tourism innovation

► Wine Spirit MBA

► Bordeaux Public Institution for Education and Vocational Training in Agriculture (EPLEFPA)

Gironde Actors

► **Wine tourism:** Great Wine Capitals, Best of Wine Tourism, Cite du Vin

► **Bordeaux City Bond**, fine wine and wine products storage warehouse with suspensive regime for charges and taxes

► Bordeaux Wine Bureau - CIVB

► Federation of Fine Bordeaux Wines (FGVB)

► Gironde Regional Union of Bordeaux wine and spirits brokers

► Gironde Chamber of Agriculture

► Vinexposium

Leading companies

► More than **150 Chinese investors** in the Bordeaux vineyard

► **Winetech:** MaBouteille.fr- SmartBottle - Winespace - Vitirover - Process2Wine- Ekylibre,- My Balthazar, etc.

► **Wine trade and logistics:** Castel, Lillet, Johanès Boubée, Dartess, Millésima, Ricard, Oenocar, William Pitters, etc.

► **Wine chemistry:** Laffort Œnologie, Laboratoire Excell, WIT France, Michael Paetzold

► **Barrels and cases:** Adam, Maucó Emballages, Seguin Moreau, Nadalié, Radoux

► Dartess, leader in the wine logistics sector

AGRI-FOOD

Agri Sud-Ouest Innovation competitiveness cluster, leading French agri-centre

Leading agri-food region in France: €6.4bn in turnover (excluding wine)

12,000 employees and 2000 establishments in Gironde

Leading regional exporter (including agriculture)

Leading French region for quality certifications: 218 products (AOP, IGP, etc.)

27 large international groups

High-level industrial expertise in bio-production extraction, nutrition and food preservation, nutrition and brain functions, oil and fat technology

Some 30 FoodTech start-ups

Excellence centres

- Oils & fat, lipo-chemistry nutrition
- Food quality and safety, toxicology
- Food processing technology
- Health nutrition, genetic traceability
- Plant bio-technology, varietal selection
- Caviar (90% of French production)

Training

- National Graduate School for Agricultural Sciences of Bordeaux - BSA
- Bordeaux National Graduate School of Biomolecule - ENSTBB
- Regional Training Centre for Agri-food Industries- IFRIA Aquitaine
- Bordeaux Institute of Natural and Agri-food Science - ISNAB

Research

- French National Research Institute for Agriculture, Food and the Environment- INRAE
- Institute of Oils & Fats - ITERG
- French Institute for Marine Research and Studies- IFREMER
- Aquitaine Institute for Human Nutrition- IRNHA
- Institute for Bio-chemistry and Cellular Genetics- IBGC

Sector organisations / Transfer

- 2 technology resource centres: AGIR and ITERG platform
- Regional association for Food Industries - ARIA
- CADA, Aquitaine Centre for Agri-food Development -ENSCBP
- FranceAgriMer

Leading companies

- **FoodTech:** Comerso - Ondontella - BoxEaty - TOOPi Organics-TriDifoodies - Koovee - Palladines
- **Cakes & chocolate:** Baillardran - CEMOI - Jock - La Compagnie du Biscuit - Lindt et Sprüngli - Mondelez France Biscuits- CPVD/Foulon - Nouvelle Maison Seguin
- **Beverages:** La Martiniquaise - Les Eaux Minérales d'Arcachon - Lillet - Pampryl - Ricard - Meneau - Moon Harbour - Mira - Hysope
- **Caviar:** Sturgeon - Caviar Perlita
- **Dairy products:** Cacolac - Le Petit Basque - R&R Ice cream
- **Tinned goods:** Bonduelle - Bongrain - Delpeyrat - Frigor - Labeyrie - Lou Gascoun
- **Oils:** Lesieur - Saipol
- **Nutrition:** Falières Nutriton - Nutrikeeo - Vitagermine - Yooji, etc.
- **Suppliers of active ingredients:** Activ'Inside, Fermentalg, Naolys, Laboratoire Phenobio, Saf-Isis, Pollenenergie
- **Trade:** Touton SA

FINANCE/FINTECH

A finance and technology metropolis

FrenchTech Bordeaux accreditation

A leading host region for fintech, legaltech and insurtech start-ups

Academic excellence in law and economic science

4th ranking urban area for financial and insurance services: 21,000 employees (URSAFF 2019)

4th French banking centre: More than 10 international banks, inter-regional headquarters and merchant banks

Fin&tech Summit: The key event for finance and technology

Expertise: Applied data science for banking, marketing/mailing, digital engineering, etc.

Pouey International: French leader in corporate finance data

Leaderships

- Financial and banking activities
- Insurance and brokerage
- Fintech
- Participatory funding

Training

- **Bordeaux University:** around 60 master-level specialisations in law and economic science
- Master in Economy, Banking & International Finance
- Professional degree in Banking, Finance and Insurance
- Master 2 in Finance 3.0
- **Institute of Business Administration (IAE)** – Master in International Management and Finance
- **7 Business schools:** KEDGE, INSEEC, ESG, ESSCA, ISG, IDRAC, ISEG Marketing & Communication
- Master in Innovation Management and Fintech (ESSCA)
- MsC Banking and Finance (KEDGE)
- Master of Science 1 in Finance, Law, Taxation and Assets (INSEEC)
- National Graduate School of Banking
- Bordeaux Institute of Political Studies

Research

- Renowned university laboratory: Larefi (Analysis & research in economy and international finance)
- Banking & Finance research chair
- LaBRI - Bordeaux-based IT research laboratory
- INRIA Bordeaux, Research Institute for Digital Science

Public Actors

- Bordeaux Place Financière et Tertiaire - BPFT
- Comité des Banques Aquitaine
- Les Banques publiques (Bpifrance and Banque des Territoires)

► Investor tracking unit (ADI and the Fundmeup platform)

► Funding initiated by the Regional Authority (NACO, VitiRev, Nouvelle Aquitaine Participations, etc)

Leading companies

Insurance:

- **Headquarters:** Filhet-Allart, AMV (motorcycle insurance, headquarters) – Axa Wealth Services – Eurodommages – Sompco Japan Nipponkoa Martin & Boulart SAS (France headquarters) – SPB Family, etc.
- **Management centres:** Natixis Assurances – Adenes – Pro BTP – Gan Groupama – Gras Savoye – Hiscox Assurances, etc.

Banking:

- **Headquarters:** Banque Populaire Aquitaine Centre Atlantique - Caisse d'Épargne Aquitaine Poitou-Charentes - CIC Sud-Ouest - Crédit Agricole d'Aquitaine - Crédit Mutuel du Sud-Ouest - FLOA Bank, etc.
- **Business units / Service centres:** La Poste (DISF) - BNP Paribas BDDF - BNP Paribas Personal Finance - GIE AGIRC-ARRCO - Caisse des Dépôts (Direction des retraites et de la solidarité / Informatique CDC) - Crédit Agricole Technologies et Services, etc.
- **Private and asset management banks:** CA Indosuez Wealth Management - Edmond de Rothschild - Gresham Banque Privée - Lazard Frères Gestion - Meeschaert - Milleis Banque - Neufilize OBC - Rothschild Martin Maurel - Société Générale Private Banking - UBS Banque Privée, etc.

Capital investment:

- **Bank subsidiaries:** Arkéa Capital - BNP Paribas Développement - Crédit Mutuel Equity - GSO Capital - Ouest Croissance - Société Générale Capital Partenaires, etc.
- **Local management organisations:** Aquiti Gestion - Galia Gestion - IRDI SORIDEC Gestion - iXO Private Equity - Newfund, etc.

► **National investors:** ACE Management – Demeter – Yotta Capital Partners, etc.

► **Equity holdings and corporate ventures:** Bernard Magrez – Groupe FIB – Nisima – Fayat Acceleration Startups, etc.

► **Participatory funding platforms:** Bordeaux Gironde Funding – HelloAsso – Happy Capital – Lumo – Solylend – Tudigo, etc.

► **Audit & consultancy:** Deloitte – EY – KPMG – Mazars – PwC – Compagnie Fiduciaire, etc. More than 30 consultancies in M&A and ‘tax & legal’ law firms

► **Fintech-Legaltech-Insurtech:** L’Addition – Ashler & Manson – Evollis – Elwin – LGO – Elwin – Inflexis – LegalVision – Obvy – PIM – Soan Solutions – Shoyo – Trésoria – Veracash – Widmee, etc.

► **SIE business funding organisations:** France Active, Union Régionale des Scop Aquitaine, etc.

LOGISTICS AND TRANSPORT

The multi-modal logistics platform for the Atlantic area

More than 38,000 private employees in the transport and warehouse sector in Gironde

105,000 jobs in Nouvelle-Aquitaine

Logistics start-up incubator: The Warehouse de Cdiscount

Major logistics hubs: Bordeaux Fret – 7 port zones – air freight platform – Hourcade platform – Libourne area (Anglumeau, Frappe, Dagueys, etc.) – MIN – Cestas Pot au Pin – Parc logistique du Médoc (Arsac), etc.

A centre for training and research in logistics management

► Graduate School for Industrial Logistics (ISLI), European leader in Supply Chain training

► Graduate School for International Transport and Logistics (ISTELI Bordeaux),

► INSEEC, MSc2 International Buying & Supply Chain Management,

► Bordeaux University, professional degree in Logistic Process Management

► Technology Institute for Logistics and Transport Management (IUT),

► Apprenticeship Training Centre for Transport and Logistics (CFATL),

► AFT Training Centre, etc.

Specialised logistics for excellence industrial sectors

► Wine and agri-food

► Car-making/Shipbuilding

► Pharmaceuticals/healthcare

► Aeronautics/Maintenance/Outsourcing

► Humanitarian sector

Major local logistics operators

Boueix Logistique – Daher Aerospace – Dartess – DHL – Geodis – Groupe GT – Lacoste – Schenker – Olano – Sea-Invest – STEF-TFE – Mitjaville – Montané – Heppner – Leroy Logistique – SELI – UPS – XPO Logistics, etc.

Regional users of logistics platforms

Aldi, Auchan logistique, Airbus, Akidis (stva), Axial, Base sud-européenne de MSF Logistique, Ballande & Meneret, Banque alimentaire, Carrefour logistique, Castel, Cdiscount, CVBG, Decathlon, La Poste, Johannes Boubée, Joué Club, Martin Brower, Lactalis logistique, Leclerc, Lidl, Mondelez, Michelin, Nestle-Davigel, Oenoalliance, PGS, Royal Canin, Scaso Leclerc, Smurfit, Sanofi, Système U, Touton, Veralec, William Pitters, Yvon Mau, etc.

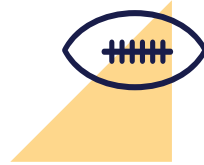


NAUTICAL INDUSTRIES

Maritime activities in Bordeaux and the Bay of Arcachon
 Leaders in yacht- and ship-building: CNB, Couach, etc.
 Bordeaux Superyachts Refit cluster: maintenance
 Expertise: materials, wood, marine electronics, upholstery
 Renowned outfitters: Furuno, Nanni, etc

LEATHERWORK - UPHOLSTERY

Major brand names: Hermès, Repetto...
 RésoCuir Nouvelle-Aquitaine cluster
 Excellence centre for leather goods
 Lectra – world leader in cutting tools + software



CREATIVE INDUSTRIES

N°3 metropolis and N°2 region for video game creation
 N°2 for graphic novel professionals
 N°3 region for feature film and television shoots; 50+ video game and serious game studios / 600 jobs
 Leaders – Asobo Studio, BeTomorrow, Ubisoft, CCCP, Solidanim, Deezer....
 Virtual reality – 30+ companies (immersion, Axyz, I2S)

PHOTONICS - MICROWAVES

Laser Mégajoule, a unique scientific facility in Europe
 ALPHA RLH – Photonics and hyper-frequency competitiveness cluster
 Pyla vocational training centre, Institut d'Optique Graduate School
 Markets: IOT, self-driving vehicles and healthcare
 ALPHANOV – optics and laser technology centre



TOURISM

Bordeaux, a leading destination for sustainable tourism

Gironde: 4th leading department for tourism in France

Bordeaux, 5th most popular French destination (in overnight stays)

Leading metropolis for hotel occupancy rates (74.6%)

Bordeaux-Mérignac Airport, leading regional airport

20 million passengers at **Gare St. Jean train station** per year, one of the biggest stations in France

Paris just 125 minutes from Bordeaux by high-speed rail

2nd most popular Atlantic port for sea cruise stopovers

Tourism projects (2022): Aquarium at Euratlantique, Tarmaq (Aeronautics theme Park)....

Tourism economy

- ▶ 25,000 private employees in tourism for Gironde, i.e. 4% of the labour market
- ▶ 15,000 jobs in Bordeaux Métropole
- ▶ **Gironde:** 9.9 million overnight stays (25% from overseas)
- ▶ **Bordeaux Métropole:** 6.5 million overnight stays (25% from overseas),
- ▶ 42,000 sea cruise passengers
- ▶ 21,400 river cruise passengers
- ▶ **A young tourist profile:** 36% under 35 years
- ▶ €1.8bn in tourist consumption per year (Gironde)
- ▶ 260,000 beds in Gironde (hotels, campsites, etc.)
- ▶ **Hotel industry:** 14,000 jobs, €1.7bn in turnover for Gironde
- ▶ Pioneer in **e-tourism:** Booking.com, Samboat, Yescapa, Wiidii, GMT Editions, Aerticket, FCM Travel Solutions, Terres Lointaines, etc.

Business tourism

- ▶ 4th leading host city for international conferences
- ▶ 180 conferences, including 54 international events (2019)
- ▶ More than one million people welcomed
- ▶ 7 conference centres, including: Cité Mondiale, Palais de la Bourse, Hangar 14, Palais des Congrès, Parc des Expositions, Hall Palais 2 L'Atlantique, Palais des congrès d'Arcachon, etc.
- ▶ +114 destinations served from Bordeaux Airport
- ▶ Vinexpo, the world's largest wine and spirits trade fair

Leaderships

- ▶ **Gastronomical tourism:** 14 Michelin-starred chefs
- ▶ **Wine tourism:** France's most visited vineyard
- ▶ **56 cruise ship stopovers**, 40,000 passengers
- ▶ **Bordeaux, a golfing destination**
- ▶ **Seaside tourism:** Nautical and surfing activities

Attractiveness

- ▶ The French department with the highest number of historical monuments
- ▶ **Cité du Vin:** 415,000 visitors, 1st site visited
- ▶ Opening of the Bassins de Lumière
- ▶ 6 Vignobles & Découvertes destinations
- ▶ 160km of GR® hiking paths in Bordeaux Métropole, 1,500km in Gironde
- ▶ 150 public parks and green spaces
- ▶ **Leading national network of cycle paths** (390km of departmental cycle paths)
- ▶ 125km of coastline in Gironde
- ▶ Carcans-Hourtin, **France's largest natural lake**
- ▶ Bordeaux, the largest UNESCO World Heritage-listed ensemble
- ▶ 10 UNESCO World Heritage sites
- ▶ **High-level facilities:** Arkéa ARENA, Matmut stadium, velodrome, skate park, etc.

Main Actors

- ▶ Bordeaux Métropole Tourist Office and Congress Office
- ▶ Congrès et Expositions de Bordeaux (Bordeaux Exhibition Centre)
- ▶ CCI Bordeaux Gironde
- ▶ Gironde Tourisme
- ▶ Nouvelle Aquitaine Regional Tourist Board

INVEST IN BORDEAUX

Invest in Bordeaux is the economic development agency of Bordeaux and the Gironde department.

A non-profit organisation supported by more than 300 members, the Agency is commissioned by the City of Bordeaux, the Métropole, the Chamber of Commerce & Industry and the Nouvelle-Aquitaine Regional Authority to welcome and support, free of charge, companies in setting up, expanding and relocating in Gironde.

Experts are at hand to help companies optimise their set-up phase and develop their business in the Bordeaux region.

- **Project analysis and strategic advice**
- **Economic information and data on the region**
- **Identification of property solutions and sites for location**
- **Regulations, taxation and funding solutions**
- **HR support, mobility and spouse employment**
- **Local insertion and business networks**
- **Communication on projects**

Key figures

+300 members, companies and socio-professional organisations

Around 1,000 businesses supported since 1996

More than 26,000 jobs advertised

References

Betclac, Deezer, ManoMano, Back Market, Hermès, Ubisoft, Microsoft, Mirakl, Safran, Arkea, ACC, BNP BDDF, One Point, OVH, and more

Services



Property solutions



HR/Mobility



Information



Administrative & legal



Integration in the eco-system



Funding



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<https://www.linkedin.com/company/invest-in-bordeaux>



311 MEMBERS IN 2020

246 companies

Ace Management, ActifRéso, Activus Goup, ADIM Nouvelle Aquitaine, ADP Enseignes, Advance Engineering, ADVENIS, Advens, Aéroport de Bordeaux Mérignac, AGC/AD Partners, Agence Compact, AGS Déménagements internationaux, Analysts - PJ & Associés, Appart'Hôtel Victoria Garden, Archimage, AREKIPA Production, ARGUIROSE, ArianeGroup, AROM (groupe), ATIMIC, AtoutVeille, AVENTIM, AVISIA Sud-Ouest, Banque des Territoires de la Caisse des Dépôts, Banque Populaire Aquitaine Centre Atlantique, Barnes International, Beacher Concept II, Becity Grand Ouest, Bee Smile, Bernabeu Conseil et Recrutement, Bluelinea, BNP PARIBAS Real Estate transaction France, Booster Academy, Bordeaux Autrement, Bordeaux Destination, Bordeaux International School (BIS), Bordeaux Saveurs, Boueix Logistique, BPI Group, Buro Club, Cabinet AXA Aoustin, Cabinet Conseil en Management Hélène Kerberenes, Caisse d'Épargne Aquitaine Poitou-Charentes, Caisse Régionale de Crédit Agricole d'Aquitaine, Cap Ingelec, Capstan Sud-Ouest, Caroline Visser Développement touristique - Formation, Cassous, Caze Immobilier d'entreprise, CBRE Agency Bordeaux, CDI 3.0, CECA, CIC Sud-Ouest, Citanium, Clear Channel, COBER, COGEDIM Aquitaine Pays Basque, Colliers International, Communication Alain Ribet, Com & Visit, Consultimo, COVALAM, Crea Concept, Crédit Mutuel du Sud-Ouest, Critère Direct/Mylist, CTER & Co, Cushman & Wakefield, DAL'ALU, DASSAULT AVIATION, Dauchez Payet, DC Pilot, De Corgnol & Agnès, Deezer, Delcade, Deloitte & Associés, Demand Driven Technologies Europe, Discover Formations, DomoFrance, Ecole Française de Décor, Ecoutez Voir, EDEIS, eDevice, EDF, EFAP/ICART EFJ BRASSART (groupe EDH bordeaux), EIFFAGE, Elodie Varenne EIRL EDEVA, ENEDIS, ENGIE Direction régionale Nouvelle Aquitaine, Entreprise et Patrimoine, EOL, ESTIM'MOUV, ETHICS Group, EVEREST HC (My Sofie), EVOLIS groupe JLV, Executive Relocations, Fabernovel, FARRAIGE, FAYAT Groupe, FIDAL, FIKA, Firstep en Anglais, Formasup Campus, French Factory Bordeaux, Gaz de Bordeaux, Gertrude, Gm2J Développement, GOSTO par NEGOSTOCK, Grand Port Maritime de Bordeaux, Green Lighthouse Développement, Groupe AESIO, Groupe AQMO, Groupe DUVAL Atlantique, Groupe La Poste, Groupe Mobility, GSE Régions, Guintoli groupe NGE, Hancock Hutton Langues Services, HARI France, Héméra, HETIC 3, Home Explorer Relocation, Hôtel de Sèze, IDRAC Business School, Immersion, Immobilier d'Aquitaine, Imprimerie Castet, INEAT, InfleXsys, INSEEC BBA, Invest-Bordeaux - Vignes à vendre, Invivoo, JC Decaux, Kairos Fortuna, Kaora Partners Aquitaine, Kedje Business School, KEOLIS Bordeaux Métropole, Label Architectures, La Boîte à Films, La Tribune, Lazard Group Real Estate, L'Echappée Bière Bordeaux, Legendre Immobilier, LGO, LISEA, Lokizi, maboutelle.fr, Maison Initiative Entrepreneuriat couveuse ANABASE, Maison Johanès Boubée, Mallette Graphique - studio de création, Mama Works, ManoMano (Colibri SAS), Ma Nouvelle Ville, Manpower France, Marcel - Relocation with Sense, Marula Conseil, Medevice Accelerator, Mediacrossing, Med Trust France, Merck Biodevelopment, Michelin (Simorep & Cie), MICROSOFT France, mOm' Bordeaux, Mon Aide Immobilière, Moon Harbour, Mota Manutention Coworking, MOTER, Multimédia Solutions, Newsroom 365, Nexity Conseil et Transaction, Niji, Ninjads, One Man Support, Oxycom - Votre oxygène commercial, Page Personnel, Panorama Antennas, PHI RH, Pishiki Mikana, Ppit'nCo, Pramana, Proxiad, PwC, Qapa, Ramery Immobilier, Randstad Search, RCG Bordeaux (ICD Immobilier Commercial Développement), REGUS Bordeaux IWG Group, Réseau de Bordeaux FC Girondins de Bordeaux, Robin Finance, RTE Délégation Sud-Ouest, SAFEGE (SUEZ Consulting), SAFT - Division ESS & Mobility, Serum and Co, S.I.C.C, SIPLAST - BMI Group, SKALE-5, SNAPP / FIDME, SNCF Voyageurs, Soan, Socialy, SoCréatifs, Solstye, SOLVAY Laboratoire du Futur, Sophia Genetics, Sport Business Group, Stéphane Plaza Immobilier, Suez Eau France, SULLY-GT Promotion, SYNERGY, Synergy Mobilité, TAGERIM Promotion, Talan, Tchintz, Teamside, Tekio, Tekoway, Tétris, Thales AVS France, Tourny Meyer, Transicia, Trans-Missions, Tree-Cycle, Treefrog Therapeutics, Tsunami, UX-Republic, Vacher Entreprise & Commerce, Valuatis, Vansken, Veolia Activité Recyclage et Valorisation des déchets, Veolia Energie France, Vous Com'L (Rallye des Pépites), VPSITEX, Walter, Welcode, Wellio, Widoowin, WIGI Work is Good In, Wikane/Clarima, Wine & Dine, Wine Equation, XXL Happyness, Yncréa Nouvelle-Aquitaine, YSOPIA Bioscience, Zabala, Ziegler France, Zoom RH.

MAIN MEMBERS*





14 REAL ESTATE PARTNERS



65 Socio-economic partners – local authorities – private establishments

Académie des dirigeants, ACTE, ADI Nouvelle Aquitaine, Aérocampus Aquitaine, AES, Alliance Française Bordeaux-Aquitaine, APEC Bordeaux, APF France Handicap, Aquitaine Culture, Aquiti Gestion / Aquitaine Amorçage, Bordeaux-Accueille Métropole, Bordeaux Aéroport, Bordeaux Entrepreneurs, Bordeaux Euratlantique, Bordeaux Games, Bordeaux Métropole, Bordeaux Montesquieu (technopole), Bordeaux Place Financière et Tertiaire, Cap Sciences, CCI Bordeaux Gironde, CIBC 33, CIVB, Club d'Affaires Franco-Allemand Bordeaux-Nouvelle-Aquitaine, Club d'Affaires Russie/CEI, Club des Entreprises de Bordeaux, Cluster Bordeaux Superyachts Refit, Comité CCE Nouvelle Aquitaine, Communauté de Communes du Grand Cubzaguais, Communauté de Communes de l'Estuaire, Communauté de Communes de Montesquieu, Congrès et Expositions de Bordeaux, Conseil Régional de Nouvelle-Aquitaine, Espace Emploi AGIRC ARRCO, Fédération Française du Bâtiment Gironde, Fondation Bordeaux Université, Fondation pour la Culture et les Civilisations du Vin, FRAC Nouvelle Aquitaine MÉCA, France Chimie Nouvelle Aquitaine, French Tech Bordeaux, GIPSO, Grand Projet des Villes Bassens-Cenon-Flourac-Lormont, Hauts de Garonne Développement, inCité, Inno'vin Bordeaux Aquitaine, Institut de l'Engagement, La CALI - Communauté d'agglomération du Libournais, LConnect, Les Premières Nouvelle Aquitaine, Mairie de Bordeaux, MEDEF Gironde, Observatoire de l'Immobilier Bordeaux Métropole, ODÉYS Cluster Construction & Aménagement Durables, Office de Tourisme et des Congrès de Bordeaux Métropole, Ordre des Avocats de Bordeaux, Préfecture de la Gironde, Réseau CREATI Bordeaux TechnoWest, Sciences Po Bordeaux, Talence Innovation Sud Développement, Technopole Bordeaux Technowest, UIMM Gironde-Landes, Union des Côtes de Bordeaux, Union Maritime et Portuaire de Bordeaux, Union Régionale des Ingénieurs et des Scientifiques d'Aquitaine (URISA), UNITEC, Université de Bordeaux.



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