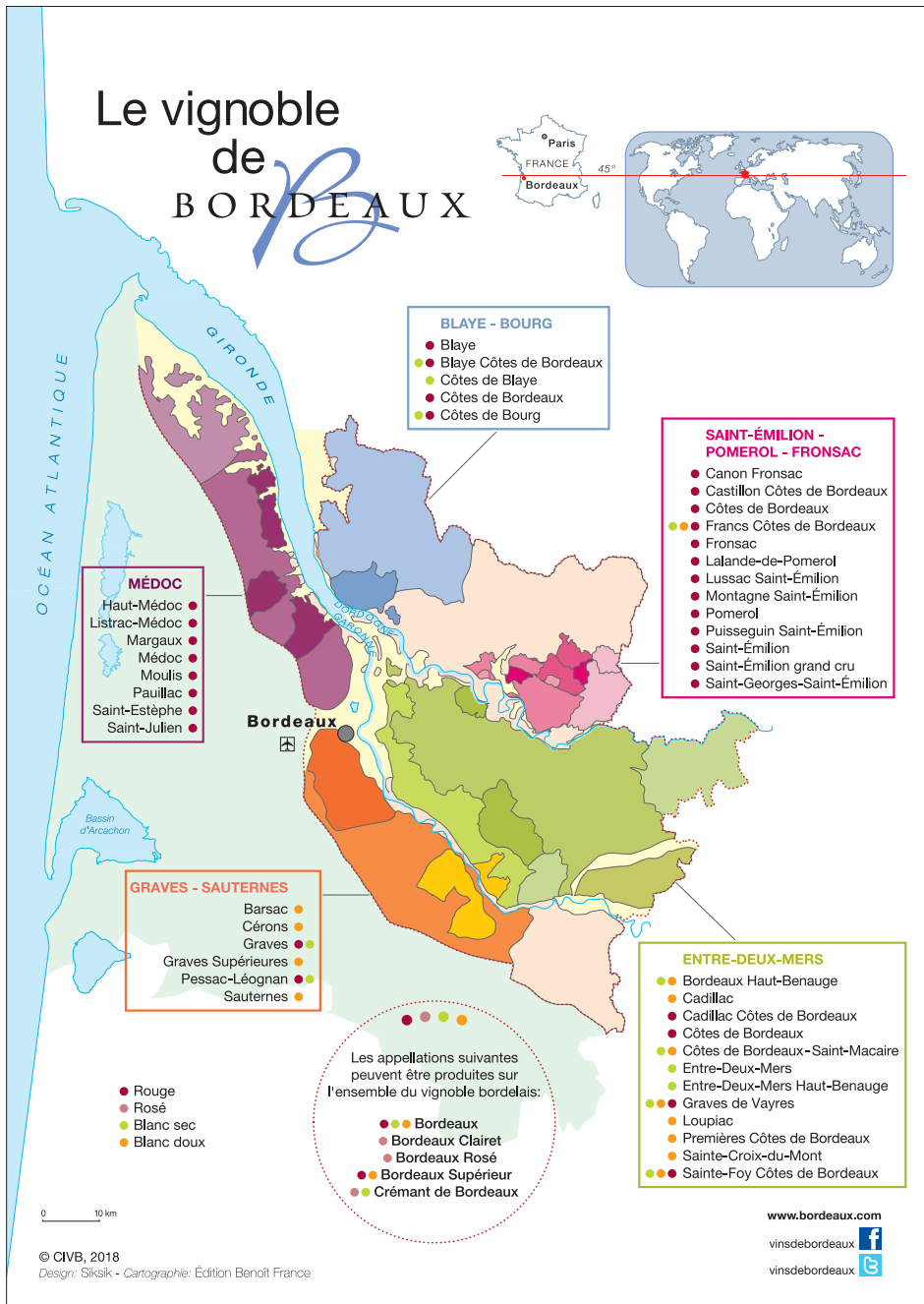


Economic Profile

Bordeaux - Gironde

2024

BORDEAUX VINEYARDS MAP





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ECONOMY AND EMPLOYMENT

Nouvelle Aquitaine, 3rd ranking French region for wealth creation in 2021

Gironde, 6th ranking department for job creation (Trendeo 2023, excluding Paris)

Bordeaux, 2nd among metropolitan areas (excluding Paris) for industrial job creation (Trendeo) 2009-2022

Bordeaux Métropole, the most attractive

metropolitan area for employees and companies (Observatoire des Métropoles 2023)

World N°1 region for AOC appellation wine production

France's 3rd ranking aeronautics basin

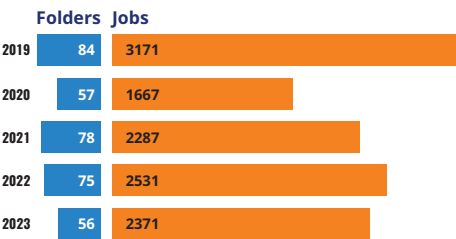
100 new investment projects in Nouvelle-Aquitaine in 2022

HR and human capital

- **Nouvelle-Aquitaine**, 2nd most attractive region
- **Gironde**, 3rd ranking metropolitan department for demographic growth, +20,000 inhabitants per year
- One new arrival in five comes from the Ile-de-France region (22%)
- Growth in salaried employment 2022-2023: Gironde +1.7%; Bordeaux employment area +2.2% (Urssaf)
- 110,000 executive roles in Gironde
- 6 out of 10 jobs located in the Gironde metropolitan area

Company location in Gironde in the last 5 years

(Invest in Bordeaux)



Major names located in Bordeaux in the last 5 years, supported by Invest in Bordeaux:

Ubisoft, Deezer, Hermès, OVH, ManoMano, Microsoft, Back Market, Sophia Genetics, BNP BDDF, Betclic Group, Mirakl, Intuitive Surgical, One Point, Safran Aircraft Engines, Safran Additive Manufacturing Campus, ACC, Dedalus, PwC, Rolls-Royce, UCPA, Mylan, etc.

International opening

- Nearly 1,850 foreign companies in Nouvelle-Aquitaine
- Welcoming foreign investment: 4th ranking region with 102 foreign projects (2022)
- 56 consulates and diplomatic representatives including the USA, UK, Germany, Spain, etc.
- A network of cooperations and twin-towns (Bilbao, Bristol, Federal State of Hesse, Los Angeles, Madrid, Munich, Porto, Quebec, etc.)
- International organization membership: UNESCO World Heritage Cities' Club, Eurocities, Community of Ariane Cities, Great Wine Capitals Global Network, etc.

	Nouvelle-Aquitaine	Gironde	Bordeaux Métropole
Density (pop. /km ²)	71,2	164	1 417
Population per million in 2021	6,069	1,655	0,831
Average annual growth 2015-2021	+0,4%	+1,1%	+1,2%
Total employment in the workplace, 2023*	2 286 800	712 400	432 398
Employees 3 rd quarter 2023**	1 592 466	520 921	435 731
Annual growth 3 rd quarter 2022-2023	+0.7%	+1,1%	+1.3 %
Industry	258 983	62 341	36 490
Annual growth 3 rd quarter 2022-2023	+1.1%	+2,9%	+4.1%
No. of establishments*	563 627	178 324	98 353
Industry (% of total)	8,8%	5,7%	4,4 %
Building	12,4%	12,2%	9,8 %
Trade, transport, hospitality / catering	28,2%	27,5%	27,2%
Services	50,6%	54,6%	58,6%
Business creation (incl. self-employed) - 2023	87 110	31 660	19 329
Growth rate 2022-2023	-2,2%	-3,7%	+0,9%

Sources: population RGP INSEE 2021 - *Total employment INSEE 2023, Establishments INSEE Sirène 2022 - **Employees URSSAF 2023



THE COUNTY OF GIRONDE

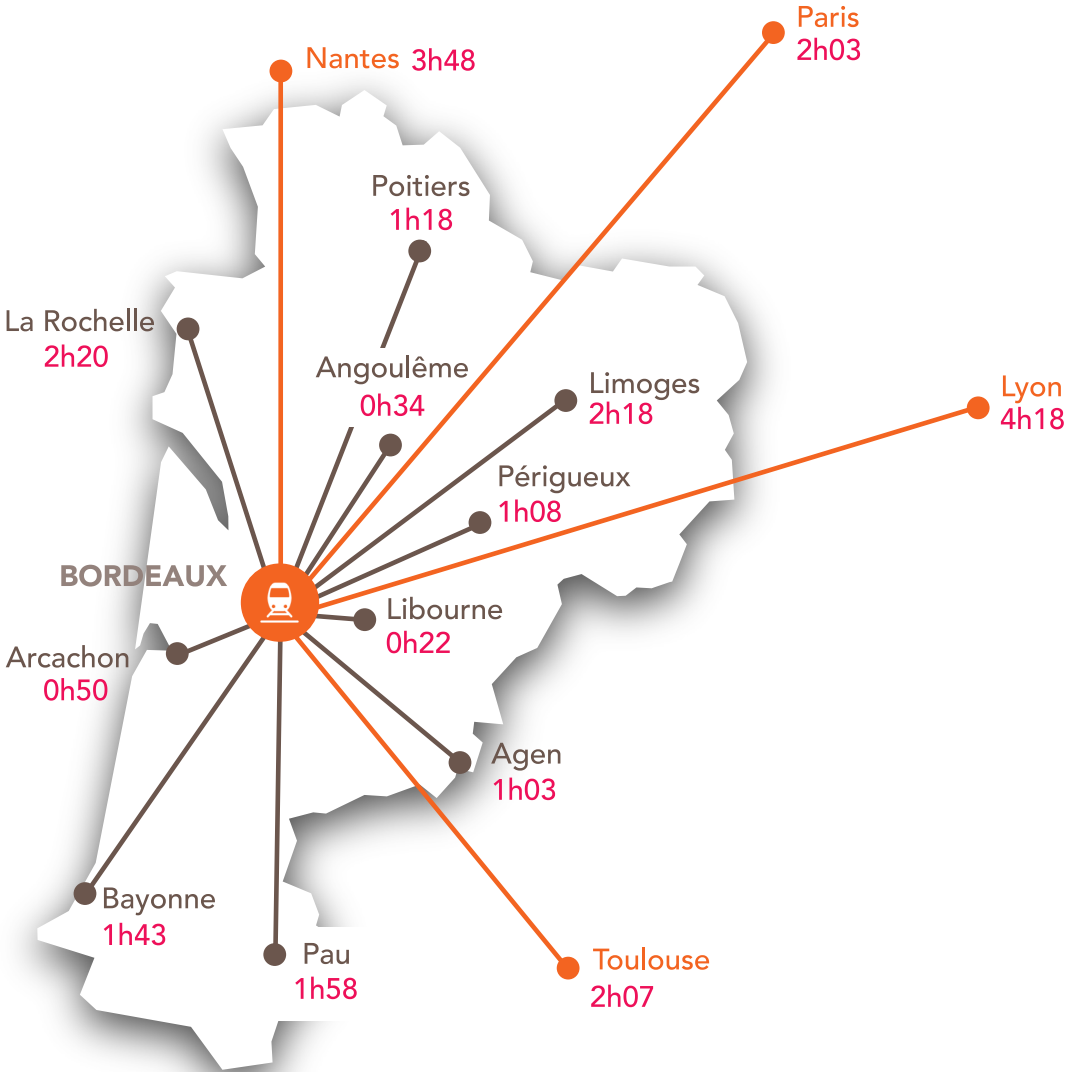


Source: A'urba

	Nb of municipalities	Pop.	Estab.*	Employees
Bordeaux Métropole	28	819 049	25 498	342 699
CA du Libournais	45	92 148	2 402	20 138
CA du Bassin d'Arcachon Nord (COBAN)	8	70 808	1 958	13 478
CA Bassin d'Arcachon Sud-Pôle Atlantique (COBAS)	4	68 175	2 320	14 799
CC de Montesquieu	13	46 638	1 229	9 612
CC du Sud Gironde	37	39 211	1 134	8 761
CC du Grand Cubzaguais	16	36 948	923	5 734
CC Convergence Garonne	27	32 819	737	3 816
CC Jalle-Eau-Bourde	3	32 035	1 164	21 595
CC Médoc Cœur de Presqu'île	18	30 552	955	5 790
CC Médoc Estuaire	10	29 640	569	3 295
CC du Secteur de Saint-Loubès	6	28 559	1 045	12 441
CC Médoc Atlantique	14	27 231	877	3 325
CC du Réolais en Sud Gironde	41	23 868	611	3 421
CC des Portes de l'Entre-Deux-Mers	11	21 971	611	4 165
CC Méduillienne	10	22 016	408	2 086
CC de Blaye	20	20 151	515	2 421
CC Latitude Nord Gironde	12	21 103	369	2 014
CC du Val de l'Eyre	5	21 206	421	3 475
CC des Coteaux Bordelais	8	21 207	544	6 165
CC Castillon/Pujols	31	19 014	609	2 374
CC du Créonnais	15	18 096	441	1 853
CC du Fronsadais	18	17 452	359	1 376
CC du Pays Foyen	20	16 623	502	2 495
CC rurales de l'Entre-Deux-Mers	50	16 554	542	1 299
CC du Bazadais	31	15 769	372	2 696
CC de l'Estuaire	14	15 767	380	3 944
CC du Grand Saint Emilionnais	22	14 314	961	2 156

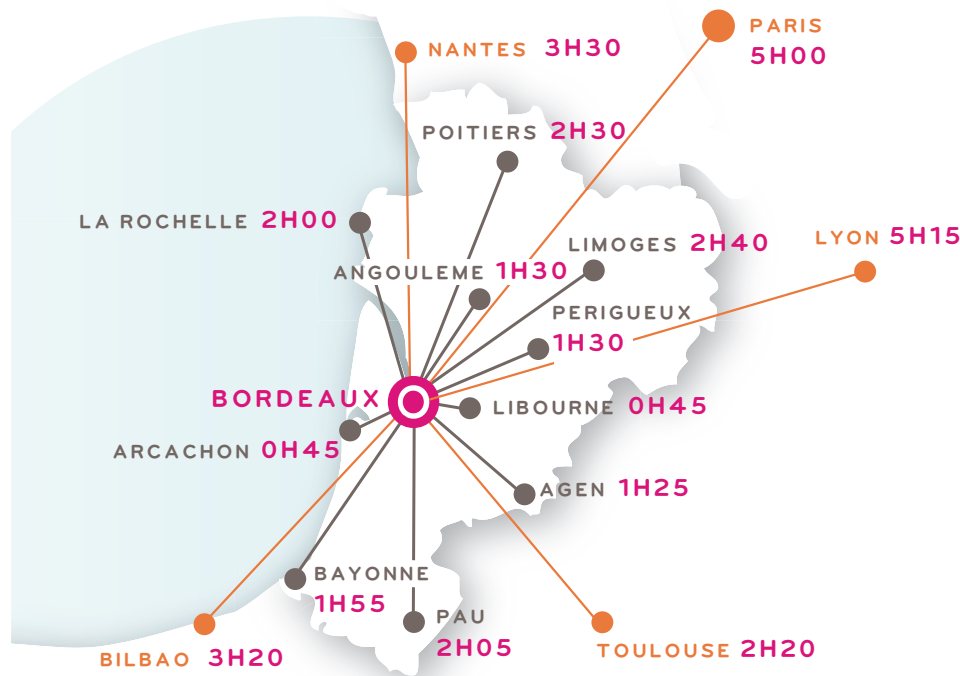
Sources: INSEE 2020 - ACOSS 2022 - *active employing establishments - CA: Community of conurbations, CC: Community of communes

FASTEST TRAVEL TIMES BY RAIL FROM BORDEAUX





DRIVING TIMES FROM BORDEAUX



Source: Invest in Bordeaux

FLIGHT DESTINATIONS FROM BORDEAUX



Source: Bordeaux Airport

News 2024

A REGION FOR SUSTAINABLE ENTERPRISE

Accessibility

LGV high-speed rail line Bordeaux – Paris
2hrs 4min

- ▶ 16 trains per day on average for Paris + TGV direct to Massy and Roissy
- ▶ **Bordeaux Saint Jean SNCF train station:** over 20 million passengers a year (+40% since 2014)
- ▶ 2 Inter-city lines: Bordeaux/Nantes - Bordeaux/Toulouse/Marseille
- ▶ 15 TER regional express lines from Bordeaux
- ▶ Opening of 3 RER regional express networks (Libourne, Arcachon, Médoc, Langon, etc.)
- ▶ GPSO project: Bordeaux-Dax and Bordeaux-Toulouse (2032)
- ▶ Gare St Jean railway station construction: €20M by 2025

Bordeaux Mérignac Airport

- ▶ Passenger traffic: 6.6 million (2023), including 4.4 million international
- ▶ Routes to 100 destinations, 23 countries served
- ▶ 30 airline companies
- ▶ Connections to 8 intercontinental hubs and 10 French cities
- ▶ Access via tram A
- ▶ €240 million investment plan: low-cost terminal, building to link Concourse A and B, low-carbon strategy

6th largest metropolitan seaport

- ▶ Maritime traffic: 6.2 Mt (2023)
- ▶ 7 specialist terminals along the Gironde estuary
- ▶ A future naval hub for ship dismantling, refit and repair work
- ▶ A low-carbon, circular economy reindustrialization strategy
- ▶ River port for cruise ships (60 stopovers in 2023 in Bordeaux and Le Verdon)
- ▶ 8,100 jobs and 275 companies in the port / industrial park

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)

Major infrastructure projects

- ▶ Simone-Veil Bridge, RER regional express networks, 7 express bus lines (BHNS), REVe express bicycle network, river transport

Business ecosystems

Nouvelle-Aquitaine club for medium-sized businesses

FrenchTech Bordeaux

5 accredited competitiveness clusters:

- ▶ **ENTER** (Digital Excellence for Environmental and Responsible Transitions), Goal: to be the leading competitiveness cluster with a mission for responsible digital technology
- ▶ **Aerospace Valley – "Aeronautics, Space & Embedded Systems":** international cluster – Europe's 1st-ranking employment basin – 159,600 employees, 1,760 establishments, 8,500 researchers – over €113 billion in turnover – leaders in aeronautics, newspace and drones.
- ▶ **ALPHA RLH Laser & Microwaves:** 60 start-ups created – 12,000 direct skilled jobs including – 3,000 direct jobs – 700 researchers – 200 graduates per year. World-renowned scientific tool: Laser Mégajoule - 15 laboratories. Turnover: €2M.
- ▶ **XyloFutur – Products and Materials from Planted Forests:** 28,300 establishments – 60,000 jobs – 34 training and research centers - Turnover: €10.2bn.
- ▶ **AGRI Sud-Ouest Innovation:** Agricultural and agri-industrial cluster for the Occitanie and Nouvelle-Aquitaine regions - France's leading agri-cluster – 220,000 jobs – Turnover: €12bn.

Clusters

- ▶ **Aeronautics and space:** Aerocampus Cluster, Alienor Innovation Défense, Digital Aquitaine (TOPOS)
- ▶ **Digital activities:** Digital Aquitaine, Naos (open-source software), SO Games, EdTech, Aquitaine Robotics, Club Commerce Connecté, Smart4D, CoBo Collectif Bordelais
- ▶ **Health - Chemistry:** Polepharma-GIPSO, ALLIS NA, Cosmetic Valley, Digital Aquitaine (ICT for healthcare), ACD Nouvelle – Aquitaine
- ▶ **Eco-friendly activities:** Aquitaine Chimie Durable, SOLTENA (environmental transitions), ODEYS (sustainable building)
- ▶ **Energy:** Energy storage cluster, E-Clide
- ▶ **Agri-food / wine:** Inno'vin, Bio-inspection and Bio-solutions cluster
- ▶ **Sailing:** Bordeaux SuperYachts Refit, Atlantic Cluster (sailing and naval activities)



Welcome offer for businesses and start-ups

► **Bordeaux Technowest technology park**, 9 dedicated technical sites: aeronautics, space & defense, industrial ecology, smart city, smart building, connected commerce, energy, foodtech and winetech, **maritime and river**

► **Unitec technological park**: 7 theme incubators, 1 nursery, 4 company location sites including the **Cité Numérique**

► **Incubators**: **Impulsion** dedicated to sports startups, **TIPi 535** dedicated to tourism, **Bordeaux CareLab** dedicated to healthcare, Bernard Magrez **Startup'Win** dedicated to wine, Transitions (Unitec) dedicated to environmental transitions

► **3 technological parks developed by the SEM** **Route des Lasers**: Laseris, Cité de la Photonique, AMPeRIs

► **Parc Eunice Newton**: Environmental intelligence park

► **Other business nurseries**: Bordeaux Montesquieu Technology Park, Aerocampus Aquitaine, Arc Sud Développement, Talence Innovation Sud Développement, Cestas Nursery, Pep'Bordeaux Chartrons, Sainte-Croix tradecraft nursery, Bordeaux Productic, Auberge Numérique, Hauts de Garonne Développement, L'Agora (CC Estuaire), COBAS nursery, Mascaret enterprise nursery, Le Campement (sustainable development) at Darwin, etc.

► **La Banquiz**, leading European accelerator for free and open-source software

► **Innovation accelerator**: Héméra

► **Group-affiliated incubators** Village by CA, La Maison pour Rebondir (Suez), Théophraste (Sud-Ouest), etc.

► **School or university-affiliated incubators**: Kedge Entrepreneur Ship, La FabriK (INSEEC Bordeaux), UBee Lab (Bordeaux University), INRIA Startup Studio, Bordeaux INPulse (Bordeaux INP), etc.

► **Chrysa-link**, SATT Aquitaine Sciences Transfert incubator

► Les Premières Nouvelles Aquitaine incubator dedicated to entrepreneurs

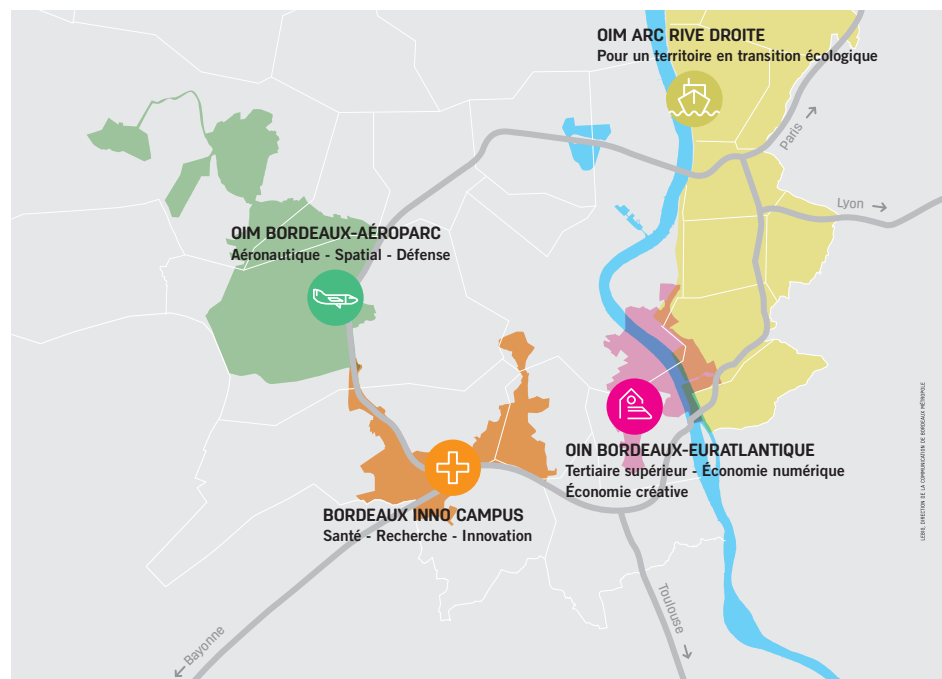
► **CSR projects** incubator (Arc Sud Développement)

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

► **InnoGaronne**: innovation and economic transition cluster (Arc Rive Droite)

► **Local public companies**: Bordeaux Euratlantique (public administration establishment) - Route des Lasers (semi-public company) - La Fabrique (La Fab) de Bordeaux Métropole (local public company) - Bordeaux Métropole Aménagement (BMA, semi-PLC) - SPL Bordeaux Aéroport (local public company) - inCité (semi-public) - SRIA University of Bordeaux

Major regional projects



Source: ©Bordeaux Métropole 2024

Bordeaux Inno campus

Knowledge and Innovation

Partnership Development Project (11 institutions) covering 1,500 hectares

6 municipalities: Pessac, Talence, Gradignan, Bordeaux, Canéjan and Mérignac.

N°3 business center in Bordeaux Métropole: 48,500 jobs, 7 hospitals and 72,000 students. 3 excellence centers: health, laser-optics, ICT and innovative materials

Targets: create 10,000 jobs by 2035

Biogalian parks, Cité de la Photonique, AMPeRIS

Extra-rocade development project: redevelopment of the Grand-Bersol business park

Forty property and public space development projects

Bordeaux Euratlantique

EcoBusiness District

Operation of National Interest around the high-speed TGV train station hub, led by the public administration establishment Bordeaux Euratlantique

738 ha, 3 municipalities (Bordeaux, Bègles and Floirac)

Premises for upper tertiary, digital economy and eco-business activities

Deliveries: Eunice Newton Park, Cité Numérique, MECA, etc.

50,000 inhabitants, 500,000m² in office space, 20,000 housing units, 50 ha of green space

Location of 30,000 jobs, including 50% external

3 urban projects: Commercial activity zones: St Jean Belcier, Garonne Eiffel and Bègles Garonne

Ongoing development operations in the Metropolitan area

► **Bassins à Flot:** Reconversion of Bordeaux's former industrial and port zone into a downtown district with housing, shops, leisure activities, jobs and public facilities. Integration of port activities

► **Brazza:** Located on the right bank of the river, 43 ha in the heart of the conurbation, urban mix

► **Bastide Niel:** 35 ha eco-district on the right bank, including 30% planted public spaces

► **Ginko:** Lac de Bordeaux eco-district: 260,000 m² program on the banks of the lake

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

Bordeaux Aeroparc

The Industrial Village Spirit

Operation of Metropolitan Interest covering 3,372 ha

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

Leading regional industrial hub (47,000 jobs) and 2nd tertiary hub in the metropolitan area

140,000 m² of public and private development operations (Innovespace, Galaxy 4, 5 Chemins, Ecosph'air, Vert Castel 2, etc.)

118,000 m² of ongoing tertiary operations (45^{ème} Parallèle, Cockpit, ARKO, SPI, Le First, etc.)

Aims: consolidate the ASD and high value-added industries, reach 50,000 jobs, promote soft mobility, implement a balanced approach between economic development and preservation of the natural environment

Major projects: Cockpit, Tarmaq, Way4Space

Arc Rive droite

Transition Economics

Operation of Metropolitan Interest covering 11 municipalities, 116,000 inhabitants and 43,000 jobs

6,000 additional jobs anticipated by 2030

InnoGaronne: innovation and economic transition cluster (Arc Rive Droite)

Future wood eco-construction cluster

In partnership with the Bordeaux Maritime Port (hydrogen, re-fitting, decarbonization)

Sectors: Social and solidarity economy, green & circular economy, tradecraft

Bordeaux ranks 3rd among regional metropolises

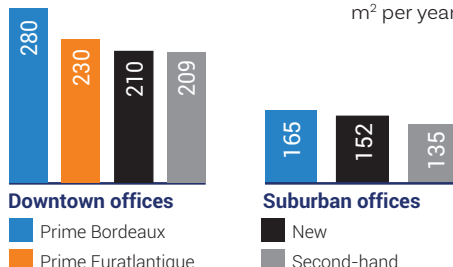
Office market (OIEB - 2023)

► 171,500 m² of orders placed (+16%)

► 301 transactions

► 271,500m² 1-year offers

Office rents (2023) (€/excl. taxes and charges/m² per year)



Business premises market (OIEB - 2023)

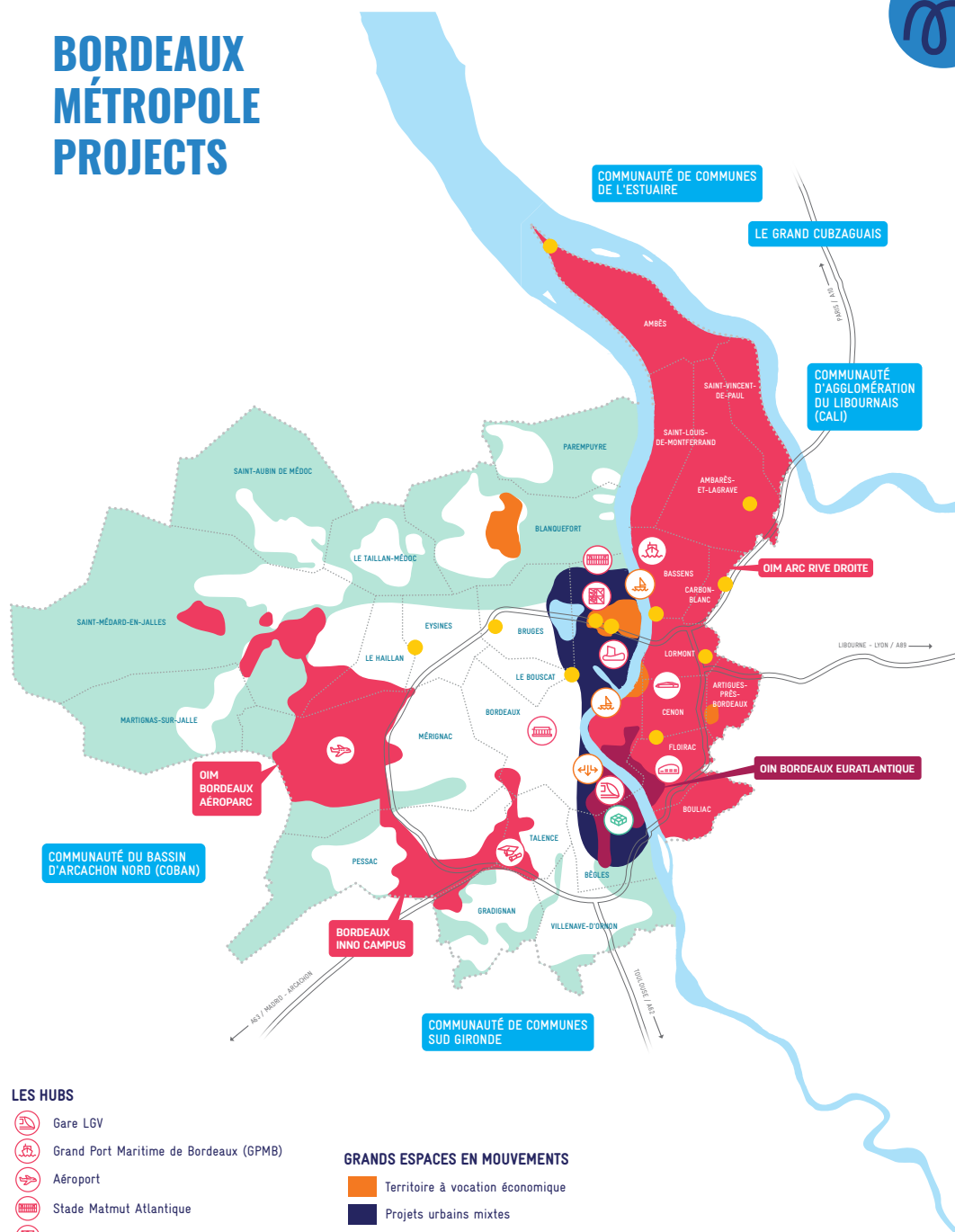
► 120,000 m² of orders placed (-15%)

► 175 transactions

► 174,000m² 1-year offers



BORDEAUX MÉTROPOLE PROJECTS



LES HUBS

- Gare LGV
- Grand Port Maritime de Bordeaux (GPMB)
- Aéroport
- Stade Matmut Atlantique
- Parc des Expositions
- Cité du Vin
- Rocher de Palmer
- Bordeaux Métropole Arena
- Grand-Théâtre
- Campus : Pessac, Talence, Gradignan

ZONE D'ACTIVITÉ ÉCONOMIQUE

- La cité numérique

GRANDS ESPACES EN MOUVEMENTS

- Territoire à vocation économique
- Projets urbains mixtes
- OIM (Opération d'Intérêt Métropolitain)
- OIN (Opération d'Intérêt National)

LOGISTIQUE URBAINE

- MIN (Marché d'Intérêt National)
- Logistique Fluviale

ACTIVITÉS PRODUCTIVES

- Sites de projet AIRE (Aménager Innover Redessiner Entreprendre)

Source: ©Bordeaux Métropole



BUSINESSES

Among the main private* employers of the Gironde Area (number of employees)

ArianeGroup	>2,000	ASD
Keolis	>2,000	Transport
Thales	>2,000	ASD
Dassault Aviation	>2,000	ASD
Cdiscount	>2,000	e-commerce
Capgemini	1000-2000	Digital
EDF - Centrale nucléaire du Blayais	1000-2000	Energy
Groupe Cassous	1000-2000	Public works
Serma Group	1000-2000	Electronics
Safran	1000-2000	ASD
Ceva Santé Animale	1000-2000	Health
Construction Navale de Bordeaux	1000-2000	Shipbuilding
AIA - Atelier Industriel de l'Aéronautique de Bordeaux	1000-2000	ASD
CGI	1000-2000	Digital
Groupe GT	1000-2000	Transport
Sabena Technics	1000-2000	ASD
Filhet - Allard	700-1000	Insurance
ACC	700-1000	Batteries
Saft	700-1000	R&D Center
Sanofi	700-1000	Pharmaceutics

Major French industrial groups present



Major international groups

Germany: Merck, Mutares, KSB, Dekra Automotive Solutions, Phoenix, Rhenus, Weiss Technik, AERTICKET Group

Belgium: Etex, Solvay, WindVision

Canada: CGI, Polaris, Vermilion

USA: Stryker Spine, IBM Corp, Mondelez, PNY Technologies, OI Manufacturing, Steris Surgical Corporation, Marsch, Microsoft, Mylan, Zimmer Spine, Thermo Fisher Scientific, Piano, Berlin Packaging, Intuitive Surgical, Bright Edge, Martin Brower, Ryam, etc.

UK / Ireland: Milleis, Maincare Solutions, Smurfit Kappa, Sage

Spain - Portugal: Applus+, Amorim, Freixenet, Volotea, Porto Cork International, Foresa France

Japan: Furuno, Kurita

The Netherlands: Nouryon, EVBox, Booking.com

Italy: Dedalus, Arena, Ficep, Nanni Industries

Switzerland: Nestlé, Lalique, Firmenich, SGS, Sopra Group, Sophia Genetics, Endress, Varo Energy

Scandinavia: Ahlstrom Paper Group, RAL Diagnostic, Recipharm, Sun Creature, Yara, Valmet

Australia: FCM Travel Solutions, QBE, Treasury Wine Estates



INNOVATIONS

Nouvelle Aquitaine 2020-30 road map: **Neo Terra for energy transition**

New **Usine du Futur** competitive and eco-responsible regional program

University of Bordeaux: Sustainable Development and Social Responsibility certification 2023 - 2026

French Tech Bordeaux: an association of over 1,000 innovative technology startups

4th ranking region for patent filings (INPI 2023)

Territoires d'Industrie certification: levers for hosting decarbonized industrial projects for Bordeaux Métropole with the Bordeaux Maritime Port and Communauté d'agglomération du Bassin d'Arcachon Nord

New Master's degree in Innovation Economics and Strategic Intelligence

Start-Up Ecosystem

► **82 high-impact startups** in Nouvelle-Aquitaine, 36 in Gironde (2022)

► Bordeaux, 3rd ranking employment basin for the number of jobs created by start-ups (Trendeo 2023)

► 3rd ranking metropolis for the number of capital raisings in 2023 (Trendeo), 63 operations

► **Main capital raisings in 2023:** Axioma, BicyCompost, Toopi Organics, OuiDrop, Yescapa, The Exploration Company, Dionymer, Eklo Hotels, Madeinvote, Newheat, Germitec, InHeart, Pollen Robotics, Omada, FreemiumPlay, etc.

► **Innovative ecosystems:** deeptech, winetech, greentech, healthtech, fintech, Newspace, Agritech

► **Participative funding:** Lumo, Solylend, HelloAsso, Happy Capital, Tudigo, etc.

► 3rd ranking metropolis for the number of co-working spaces, more than 80 in Bordeaux

► More than 20 enterprise accelerators and incubators

► **French Tech Central:** Individual meetings for startups with 34 public and private players

► **Local events:** Les Signaux X Start-up Day, Innovaday, Innov'Invest, French Tech Day, French Tech Night, Bordeaux Tech'Day, ViV HealthTech, Job Connect.

► **Noé Platform:** the first circular economy platform for construction sites (Eiffage, Suez)
► Organic matter center (Mammo)

Social and Environmental Responsibility (CSR)

► 3rd ranking region for mission-based companies (87)

► Creation of a Nouvelle-Aquitaine cluster for the Community of Companies with a mission

► **SOLTENA:** a cluster for Solutions for Environmental Transition in Nouvelle-Aquitaine

► School for ecological and societal transition, Imagine Campus, 3A school

► **ESI Green & Social Business School:** Business School for Sustainable Development and Professions of the Future

► New Degree in Corporate Social Responsibility and Management Systems (ENSMAC)

► Location of social and environmental impact businesses: Ulula, HelloCSE, GEEV, HelloRSE, Rgoods, etc.

► Bordeaux City Council's CSR self-diagnosis platform

► **RESONANCE:** Nouvelle-Aquitaine's CSR Network

► **RESOLUTIONS:** a day of CSR solutions in the Nouvelle-Aquitaine region

Circular Economy

► Solidarity-based recycling village (IKOS)

► ZIRI network (smart networks integration zone) (Bordeaux Technowest)

► Réseau d'Economie Circulaire et d'Innovation de Nouvelle-Aquitaine (RECITA)

► Recycling center for solar panels (Soren and Envie 2E Aquitaine)

► **Among the innovative companies:** BicyCompost- EthicDrinks - Keenat - Luz Environnement - Minuit sur Terre - Neoless - Toopi Organics - SAPAR - Tertio Recycle - Le Plastique Français - Netcarbon - idelam - Optima - Soofût - Le Fourgon - Cordon Electronics - Moulinot - Zeta - Pena - Mundao - Gimmic Design, etc.

Environmentally engaged and inclusive innovations

Organizations shaping the economy of the future: La Maison écocitoyenne, Darwin, Fabrique POLA, L'Arche, la Citée bleue, La Ferme de Pauline (1st urban aquaponics farm), Les Nouvelles Fermes, Zéro Waste Bordeaux, France Active, IKOS, etc.

Inclusive and ecological initiatives: 30 AMAP (consumer network to support small local farming), La Planche (Third place devoted to wood), La Boucle (devoted to circular life), SuperCoop (cooperative supermarket), La Ruhe qui dit oui, l'Atelier d'éco solidaire, etc.

SOCIAL AND SOLIDARITY ECONOMY (SSE)

Bordeaux hosting the Global Social and Solidarity Economy Forum (GSEF 2025)

Creation of a socially responsible property company by SIE stakeholders

Bordeaux ranks 1st among eco-responsible cities (IFOP)

One of the most dynamic regions in terms of SIE job creation

State accreditation of two regional centers for economic cooperation: Ikos (Solidarity-based recycling village) and the **Fabrique Pola**

dedicated to cooperation between cultural stakeholders

Renée Association and Servi en Local, among the winners of the SIE 2023 Coup de Coeur award

Places dedicated to the SIE: Le Point Commun, la Cité Bleue, LAC C, La ManuCo

24 training courses in Nouvelle-Aquitaine for SIE professions

Introduction of GEMME, a complementary local currency

Growing economic weight (CRESS)

► +42,000 employees across the **Metropolitan area**, 14% private employers, 2,927 employer establishments

► +62,400 employees in **Gironde**, one employee in 10, 5027 establishments

► 20,000 structures in **Nouvelle-Aquitaine**, 11.5% of paid employment

Innovations and financial backing

► **InvESS't NA** investment fund, operated A Plus Finance

► **ESS Tech**, a support program for SSE start-ups and stakeholders in partnership with ATIS and La Ruche

► **La Fabrique à Initiatives, La Foncière Solidaire**

► 2 social innovation incubators: ATIS and La Ruche de Bordeaux

► "Financez Demain" financial support scheme (City of Bordeaux) (€1 from citizens = €1 from the city)

► **Ikos:** solidarity-based recycling village in the Bordeaux Nord district (Le Relais, L'Atelier d'éco solidaire, Le Livre Vert, Les Compagnons Bâtisseurs and Réseau de réemploi des 2 Rives, Envie, Recyclerie Sportive, Echange Nord Sud, Replay)

Support bodies for the SSE

► Regional SSE chamber (CRESS) - "RicIESS" and "ESSpresso" business meet-ups

► Social Innovation Incubator (ATIS)

► **Bordeaux Métropole - SSE road map** - Priority sectors: zero carbon logistics, circular economy, eco-building & housing, and local economy.

► **France Active Nouvelle-Aquitaine:** inclusive financing for VSEs and local SSE stakeholders

► Coopérative des Tiers Lieux (Cooperative for the 280 third places in Nouvelle-Aquitaine)

► ACC'ESS student consultancy (a public interest cooperative society)

► URSCOP - Regional Union of Cooperative Societies technical and legal support for the creation of cooperatives

Key players

► **Cooperatives:** Supercoop, Citiz, Les Coursiers bordelais, Enercoop, la Consigne Bordelaise, Coop Alpha, COOP & Bât, O-tempora, Ellyx, Syprès

► **Non-profit organizations:** Atelier Remunérage, Le Garage Moderne, Habitat des possibles, HelloAsso, Jeunesse Habitat Solidaire, Hotravail

► **SSE commercial businesses:** La Conciergerie Solidaire, GEEV, Marie Curry, BoxEaty, Ellyx, ProbonoLab, La recyclerie sportive

► **Adapted companies:** Synergy, SIFU, Hotravail, Handicall Center, Envol, Gestform, Elise Atlantique

► Bordeaux University Foundation, SEA fund for regional transition (LISEA)

Training / Research

► Terr'ESS Chair (Bordeaux School for Political Science)

► Master's in Social & Solidarity Economy and Social Innovation (ESSIS) (Bordeaux School for Political Science)

► Master's 2 in Non-profit Group Consultancy and Management (IAE Bordeaux)

► Executive Master's in Strategies, Regions and Innovative Projects in the Social & Solidarity Economy (CNAM)

► 2 work/study courses, including a professional degree in managing a company in the social and solidarity economy (Cnam)

► High schools with an SSE focus: Sainte Marie Bastide, Sud Médoc



RESEARCH

University of Bordeaux, Sustainable Development and Social Responsibility certification (DD&RS) 2023-2026

Bordeaux INP in the Top 10 of regional patent filers in 2022 (INPI)

Shanghai Ranking by theme - University of Bordeaux in the Top 100 for Mathematics and Agricultural Science

Leading sectors in patent applications: Environment, material chemistry, medical devices

The University of Bordeaux Foundation: 34 research chairs for innovation

Among the Research Chairs: Science and Cognitive Technologies (IBM, ENSC), Science and Techniques for Digital Transformation (Arts et Métiers – ENSAM) and the Organic Farming Chair (Bordeaux Agricultural Science University)

32 accredited research platforms (University of Bordeaux)

On the campus: Ubee Lab student incubator, Coh@bit fablab, eight enterprise nurseries

The Hub platform, innovation website by the University of Bordeaux

Major private R&D centers located in Bordeaux

► **Aeronautics:** ArianeGroup, Dassault, Safran, Thales,

► **Environment:** Birdz (Véolia), LYRE (Suez)

► **Energy:** ACC, Saft, CEA-Cesta, Eurovia, EVBox (Engie)

► **Health - chemistry:** L'Oréal, Laboratoire Chimie Polymères, Merck, Solvay (Laboratoire du Futur)

► **Industry:** Lectra, PSA-open Lab Competitive Intelligence

Excellence research fields: neurosciences, healthcare technology, materials of the future, laser & optics, cardiology, archeology, digital technology & systems, environment & climate, smart transport, oenology

Presence of major national public research institutions: CNRS, Inserm, Inrae, Inria, Irstea, Inrets, Ifremer, CEA, Institut d'Optique, etc.

University of Bordeaux, Science and Technology

► **Multidisciplinary research university**

► **"Excellence Initiatives" accreditation**, €700 M in investment

► **"ExcellencES"** label for its InnovationS project

► 110 technology platforms, 430 patents jointly registered on the University site

► 4,900 people assigned to research

► 8 doctoral schools

► 11 research departments, 73 research laboratories

► The Institute of Vine and Wine Science (ISVV)

► Over 50 startups created on the university campus

Michel Montaigne University, arts, languages, literature, human and social sciences

► 700 faculty members, 650 PhD students per year

► 16 research units

► 100 research programs per year

► 1 excellence laboratory for archaeological science, Archéosciences Bordeaux

► "Montaigne Humanities" doctoral school, one of the largest in France

► 500 international cooperation agreements (Erasmus+ or bi-lateral)

► 3 UNESCO chairs

Transfer structures

► Aquitaine Science Transfert (SATT)

► ADERA (research and innovation partnership)

► ADEME (Agency for Ecological Transition)

► CEA Tech Nouvelle-Aquitaine

Technological resource centers: A.G.I.R (Innovation & Research in Agri-food) and ITERG (French Technical Institute for Fats, Oils & Related Products), CANOE platform (composites), Alphanov (Laser), FCBA (wood construction), CRT Nobatek (sustainable technology and building), CATIE (Aquitaine Center for Information and Electronic Technologies)

INRIA Bordeaux: STIP, innovation and partnership transfer service

Technology Research Institute (IRT) Saint Exupéry (aeronautics)

TRAINING

A growing range of higher education courses and new private campuses

Enrollments in higher education in Gironde: nearly 100,000 students (2022-23) including 60,000 students in the 2 universities

+30,000 university graduates per year from 2

Bordeaux universities

5,800 engineering students in public schools (INP, etc.)

Bordeaux Campus Operation: €500M in investment, 4 campuses

Bordeaux universities (2022-23)

University of Bordeaux: nearly 47,800 students, including 7,634 international students.

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

Bordeaux Montaigne University: 14,150 students, including 1,568 foreign students, 138 state diplomas, 24 languages taught, 32 Master programs, 3 training & research units. Humanities - Languages and civilizations - Territorial science and communication

2 institutes: IUT Bordeaux Montaigne and the Bordeaux Aquitaine Institute of Journalism (IJBA)

Bordeaux INP

6 public engineering schools: 3,500 students, including 12% foreign students, 900 degrees per year, 22 engineering specializations

+10 Business schools

KEDGE BS, INSEEC, ESG, ESSCA, ISG, IDRAC Business School, ISEG Marketing & Communication, IFP Bordeaux, Euridis Business School, ESI Green & Social Business School, ESCEN (International & Digital Business School), Talis Business School, Alternis Business School, NoSchool, etc.

Graduate Schools

Sciences Po Bordeaux (Political Science), Bordeaux School for Architecture and Landscape, French National School for the Judiciary, EFAP Bordeaux (PR), Bordeaux Graduate Art School, Chartrons Campus, Galileo Global Education Group schools, Higher Education Center for Music and Dance (PESMD)

Major engineering schools

► National Graduate School for Materials, Agri-food and Chemistry (ENSMAC- INP)

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

► Bordeaux National Graduate School for Molecular Technology (ESTBB – INP)

► National Graduate School for Cognitive Science (ENSC – INP)

► National Graduate School for Environmental Studies, Geo-resources and Sustainable Development Engineering (ENSEGID- INP)

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

► Bordeaux Arts et Métiers Paris-Tech (ENSAM)

► Bordeaux Sciences Agro - National Graduate School for Agronomic Sciences (BSA)

► Optics Institute Graduate School (IOGS)

► Graduate School for Aeronautics and Automobile Construction (ESTACA)

► CESI Campus Bordeaux

Campus du Lac

Bordeaux Gironde Chamber of Commerce & Industry (diploma to master levels) – Bordeaux and Libourne

Aerocampus Aquitaine

300 students, 15 schools

New schools/campuses

Elisa Aerospace Bordeaux, ESME, EduCampus, ESG Luxe, Junia, Imagine Campus (ecological and societal transition), Ecole 3A, Ecole Gustave, Bordeaux Campus Créatif, Cread interior design school, Guardia Cybersecurity school, Gaming Campus, Médecins Sans Frontières training center, SNCF Réseau campus

International training programs

► +50 international training programs (Degree, Master and PhD levels)

► Leading French university for the number of Erasmus Mundus-certified programs

► 1 international school - BIS (Bordeaux International School)

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



MAIN SECTORS IN GIRONDE



HEALTH

52,000 jobs

3rd ranking conurbation for growth in private sector jobs
e-health, medical devices, pharmaceuticals, biotech, animal health,
Merck, Ceva, Mylan, Sanofi, Acteon, Boiron
Research cluster: neuroscience, cardiology, oncology

WINE

35,000 jobs

15% of French production
Leading AOC wine-producing region in France
Leading organic wine-growing department in France
5,400 wine estates



DIGITAL

32,500 jobs

French Tech capital, responsible digital technology cluster (Enter)
3rd ranking region for video games
3rd ranking metropolis for business start-ups
Cybersecurity, e-health, virtual reality, big data, AI, robotics

AERONAUTICS/SPACE/DEFENSE

26,000 jobs

"Aerospace Valley" international cluster
France's 3rd largest employment basin
Airbus group, Safran, Thales, Dassault
Drones, missiles, new space, maintenance, etc.



TOURISM

32,000 jobs

Top 5 sustainable tourist destinations worldwide
Business destinations and congress destinations
2nd Port for cruise stopovers
Wine tourism, water activities, surfing, golf, UNESCO heritage,
Cité du Vin, Bassin des Lumières

FINANCE/INSURANCE

23,000 jobs

4th French banking center:
3rd region for fundraising
Fintech stronghold



CHIMIE/MATÉRIAUX

12,000 jobs

Leading regional technology sector (number of patents)
Green chemistry, agrochemicals, specialty chemicals, nanomaterials,
bio-based materials
Private R&D centers: Eurovia, Saft, Solvay, Suez, Véolia, etc.
3 clusters : Xylofutur, Aerospace Valley, Route des Lasers/photonique

WOOD

10,000 jobs

Leading certified sustainable forest region
Leading production and processing region
XyloFutur – Products and Materials from Planted Forests
Paperboard, pallets, cooperage, eco-construction with wood
Smurfit, Gascogne, Abzac



AERONAUTICS /SPACE/DEFENSE

European excellence ecosystem

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

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

300 companies including 7 groups: ArianeGroup, Dassault Aviation, Thales, Safran, Daher, Sabena Technics, Airbus Atlantic

+100 sub-contractors and military facilities

3rd largest regional export sector (2022)

Civil and military aeronautical programs: Falcon, Rafale, ATR airfoils, Airbus, etc.

2nd largest region for the arms industry

Events: UAV Show (Europe's leading drone trade show), AD2S Show (European MRO aeronautics show), NextSpace Symposium

Leading national center for maintenance in operational condition (MOC)

Way4Space: European Center for space innovation and research studies

Bordeaux Aéroparc Operation of Metropolitan Interest, 2 new development zones

Bordeaux Technowest technological park: incubator, Cockpit building, Cesa Drones, etc.

New developments and recruitments announced for 2023: Agena Space - Dark Space - Eurenco - Hynaero - Safran Aircraft Engines – Campus Thales – Dassault Aviation – Potez Aéronautique – EOS Technologie – Rolls-Royce

Fundraising: HyprSpace, The Exploration Company
Start-up **Sylphaero** recognised at the World Economic Forum for its electric motor

Tarmaq project, the future “City of Aeronautical Science”

Leadership

- ▶ Space launchers
- ▶ Space propulsion
- ▶ Ceramic matrix composite (CMC)
- ▶ Civilian drones
- ▶ Military and civil aircraft maintenance, MCO
- ▶ Testing of atmospheric re-entry simulation, rocket boosters, zero gravity

110 specialized training courses in Nouvelle-Aquitaine

- ▶ Eving Institute for Aeronautic Engineering
- ▶ Master's degree in Engineering and Maintenance of Systems for Aeronautics and Transport (IMSAT)
- ▶ Arts et Métiers ParisTech
- ▶ National Graduate School for Industrial Performance and Aeronautic Maintenance (ENSPIMA)
- ▶ Graduate School for Aeronautics and Automobile Construction (ESTACA), new course on decarbonizing the aeronautics industry
- ▶ National Graduate School for Electronics, IT, Telecommunication and Mathematics (ENSEIRB-MATMECA)
- ▶ New campuses: ELISA Aerospace, ESME
- ▶ Aérocampus Aquitaine (technical high school and higher diploma levels)
- ▶ Defense and Aerospace Chair at Sciences Po Bordeaux

Research

- ▶ **More than 2,500 people devoted to R&D**, 10 public research laboratories

▶ **University of Bordeaux**: Engineering & Digital Sciences and Material Science departments

▶ **NAASC** (Nouvelle-Aquitaine Academic Space Center)

▶ **CNES** (National Centre for Space Studies)

Competitiveness hubs, clusters and organizations

- ▶ **Aerospace Valley, ALPHA-RLH, ENTER**
- ▶ **3 clusters**: Aquitaine Robotics, Digital Aquitaine (TOPO), Aliénor defense innovation center (DGA)
- ▶ **BAAS organization**: Bordeaux Aquitaine Aeronautics and Space

Leading companies

- ▶ **Tactical propulsion**: ArianeGroup, Roxel, MBDA
- ▶ **New Space**: Stellar Télécommunications - HyPrSpace, - Agena Space - The Exploration Company- I-Sea - Sat4Space
- ▶ **Constructors**: ArianeGroup - CEA - Dassault Aviation - Safran Ceramics - Airbus Atlantic - Thales - Safran Aircraft Engines - Safran Additive Manufacturing Campus - Safran Data Systems
- ▶ **Drones**: Aeronefs Services - Aerix Systems - Azur Drones - Delfox - Dronisos - Drone Volt Expert - EOS Technologies - Drones Protect system - Robotics Industry - SkyBirds View - Lynxdron - Flying Robots
- ▶ **Maintenance**: AIA (Aeronautic Industrial Workshop) - Dassault Falcon Service - Sabena Technics
- ▶ **Tests**: DGA missile tests, DGA in-flight tests, CESA Drones (Test and experimentation center)



Bordeaux French Tech Capital

Digital Excellence competitiveness for Regions and Responsible Environment (ENTER cluster)

International digital hub: AMITIE submarine telecommunications cable between the USA and Gironde

32,500 salaried jobs in the digital sector in Gironde (+5.5% 2021-2022)

1,500 digital jobs created in Gironde in 2023 (Trendeo), 3rd ranking French department

3rd ranking metropolis for digital job creation 2009-2022 (Trendeo)

Clusters: Health ITC, TOPOS, E-Business Club,

Smart4D (digital simulation), NAOS (free software), EdTech, SO Games

Leading region for video games: +100 studios, 1,200 jobs and +€100M turnover

2 Bordeaux games recognized at Pégase 2024: "Assassin's Creed Mirage" and "Dordogne"

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

Home to unicorns: Mirakl, ManoMano, Back Market, Deezer, OVH

Events: Horizon(s) video game fair, Fintech Summit, Cartoon Movie, it3D Summit, Vinitiques

Leadership

- ▶ E-health (see Healthcare page)
- ▶ Connected business
- ▶ Free and open-source software
- ▶ Video games/Virtual/augmented reality
- ▶ Artificial Intelligence - Data Science (see Technology page)
- ▶ Cybersecurity (see Technology page)

Digital ecosystem players

FrenchTech, Digital Aquitaine, SO Games, Aquinum, Naos (open-source software & tech), Clusir Aquitaine, SYRPIN, NUMEUM, ENTER

Training

- ▶ Institut National Polytechnique (INP) and its engineering schools
- ▶ Junia Engineering School
- ▶ EFREI, Engineering School of Information and Digital Technologies
- ▶ Quest Education Group: Gaming Campus, Guardia Cybersecurity School
- ▶ Schools in the Galileo Global Education network
- ▶ Esprit Gaming School - EGS (video games)
- ▶ Bordeaux Ynov Campus: IT, robotics, 3D, animation & video games
- ▶ Digital Campus: school for creative professions in the digital sector
- ▶ ESCEN (Graduate School of Business and Digital Economy) - Next-U Education
- ▶ Artside Games: Advanced training in video games
- ▶ School for Artistic Professions (ESMA)
- ▶ Sup de Vinci: Graduate School for information systems engineering
- ▶ ESD (Graduate School for Digital Technologies)
- ▶ ECV - Design, 2D/3D animation, gaming and digital technology school
- ▶ 3IS Bordeaux Campus: Audiovisual, sound, animation & performance art
- ▶ Nouvelle-Aquitaine Google Digital Studio

- ▶ Holberton School, the Horde, Rocket Campus

Research

- ▶ 20+ public and private research centers and laboratories
- ▶ INRIA Center at the University of Bordeaux (National Institute for Research in Digital Science and Technology)
- ▶ LaBRI - Bordeaux Computer Science Research Laboratory
- ▶ CATIE - Aquitaine Center for Information and Electronic Technologies

Leading companies

- ▶ **E-commerce/customer relations:** Cdiscount - Back Market - Betclik Group - Mano - Mirakl - Displayce - Kaizen Agency - Feed Manager, etc.
- ▶ **Virtual / Augmented Reality:** Arkhênum - Immersion - I2S - Lumiscaphe - Hilo - VRD Studio - Nfinite, etc.
- ▶ **E-learning and serious games:** Addeo - Dipongo - IDSC Group - Interaction Healthcare - Enovation Solutions - CCCP
- ▶ **Video games:** Ubisoft - Asobo Studio - Motion Twin - Shiro Games - Playwing - Evil Empire - Nova-Box - Black Flag - ShinyPix - Big Bad Wolf
- ▶ **Audiovisual/Animation:** Makma - Umanimation - Sun Creature - Tsunami Studio - Un je ne sais quoi - oARo Studio
- ▶ **Multimedia/Music:** Deezer - Music World Media - api.video - Sound to Sight - Quantec
- ▶ **Connected objects:** NFC-I - Ubleam - InfleXsys - Genius Objects - Telecom Design - Marbotic
- ▶ **Mobile applications:** Aquitem - BeTomorrow - @t Internet - Blookup - Snapp'
- ▶ **Open-source software:** Ekylibre - Enovation-Metapolis - Temesis - Ullo - MapoTempo, etc.
- ▶ **Digital services companies:** Accenture - Activus - Alten - Atos - Ausy - Capgemini Sogeti - CGI - Concerto - IBM - Cheops Technology - CIS Valley - SQLI - Steria Sopra - One Point - GFI - Scalian - Akka technologies - Synchrone - Exodata - Technomade - Omnilog/Maltem - Scalesquid

ELECTRONICS / PHOTONICS

The largest industrial laser photonics sector in France

A national competitiveness cluster: ALPHA RLH

Electronics sector:

- 300 companies and + 20,000 jobs
- 4th ranking among regions, 8% of total employment for the sector in France
- An annual turnover of more than €1bn

Photonics sector: 100 companies, 3,500 direct industrial jobs

Nouvelle-Aquitaine Electronic Industries road map

Nouvelle-Aquitaine 2025 photonics road map

NAQtronic, regional support platform for the industrialization of electronic projects

SEML Route des lasers, local semi-public company, management of 4 technological parks
A pioneer in quantum technologies

Leadership: Avionics, embedded electronics, telecommunication, laser cutting, photonics, outsourcing, medical electronics, design, analysis, tests and component characterization.

Training

- ▶ National Graduate School for Electronics, IT, Telecommunication and Mathematics (ENSEIRB-MATMECA)
- ▶ National Graduate School for Cognitive Science (ENSC)
- ▶ 200 graduates specialized in laser optics per year
- ▶ Optics Institute Graduate School (IOGS)
- ▶ PYLA: Optics & Laser Training Center

Research

- ▶ 260 researchers and faculty members
- ▶ **"Light Sciences and applications" major research program**
- ▶ **LIGHTS&T** University Research School (Advanced Graduate program in Light Sciences & Technologies)
- ▶ National organizations: CNRS, CEA, Inria, etc.
- ▶ Laser Mégajoule, a unique facility in Europe
- ▶ NAQUIDIS Center, innovation hub for quantum photonics
- ▶ Laser and Plasma Institute (ILP)
- ▶ **Digital Photonics and Nanoscience Laboratory (LP2N)**
- ▶ **CELIA** (Center for Intense Lasers and Applications), **LOMA** (Waves and Matter), **LPCM** (Molecular Physics and Chemistry)
- ▶ IMS Laboratory (Integration from Material to System)

Sector / Transfer organizations

- ▶ **UIMM**
- ▶ **CATIE - Aquitaine Center for Information and Electronic Technologies**
- ▶ **ALPhANOV** - Technological resource center for optics and lasers
- ▶ **ALPhA** (Aquitaine Lasers, Photonics and Applications)
- ▶ Digital Aquitaine
- ▶ BIPSA - Bio Imagery, Photonics and Health

Sector leaders in Gironde

- ▶ **Photonics:** Azurlight Systems, Innoptics, Iriosome, Exail, Amplitude, Cilas, Cisteme, Photonis, Bloom Lasers, Aegis Optic, CILAS, AeroDIODE
- ▶ **Professional and military electronics:** Cap'Tronic, Thales, Safran, Saft, Serma Group, Ingeliance, TDM Ingénierie, I2S, Advanced Wireless Solutions and Services (Aw2S)
- ▶ **Organic electronics:** Symbiosis
- ▶ **Components / Microelectronics:** Adetec, Exxelia, A Puissance 3, Microsemi, EMS Proto, Xmod technologies, Furuno, PNY Technologies, Inovelec CIELE
- ▶ **Medical electronics:** Acteon, Iliasis Laser
- ▶ **Subcontractors:** Cordon Electronics, Synergy
- ▶ **Networks and telecommunications:** Adetec, ISIS MPP, Télécom Design, WorldCast Systems, RFPA, eDevice, Stellar Télécommunications, Safran Data Systems
- ▶ **Others:** Lectra (textile cutting), Birdz (smart meters), Neodio (ultra-high fidelity)



TECHNOLOGIES OF THE FUTURE

Batteries

Complete value chains: R&D, Chemistry and materials, Electronics, BMS, cells and packs, Certification and testing, Recycling

2 international research and production centers Saft and ACC

R&D platforms: Alphanov, CEA Tech, CANOE

Serma Energy, ACC's partner in electric battery testing

Startups committed to ecology and recycling: Gouach, Voltéo, E-mersiv, Retrofleet

Training plan: Battena program (BATTERies En Nouvelle-Aquitaine)

European event Battery Innovation Days

Cybersecurity

Expertise for aeronautic project managers

Campus Cyber Nouvelle-Aquitaine Wasaca, DBM Partners, Cyllène, Fidens

Regional funds for cybersecurity

Leaders: Tehtris, Eshard, F-Secure, Advens, Exodata, Niji, Talan, Altospam

GIP, malicious cyber activities

CLUSIR, the information network security club

Opening of Guardia Cybersecurity School

"Cybersecurity, systems and networks" degree at Enseirb-Matmeca

Master's degree in cryptology and computer security

Cyber-resilience of Digital Infrastructures Chair

Robotics

Sector specialized in cobotics and human-robot interaction.

Leaders: AIO - Aerospline - Proditec - VLM Robotics- Lucas Robotics - Robotics Industry - NGX Robotics - HumaRobotics - Pollen Robotics - CogEngines - EMS Proto - Namma - Fives Syleps

Aquitaine Robotics cluster: 130 stakeholders

Fundraising: VitiRover, Nimb'Blot, NGX Robotics

RoboCup Bordeaux: The world's largest robotics and artificial intelligence competition

Reachy, the humanoid robot

5 Master programs in robotics in Nouvelle-Aquitaine

CEA Tech Nouvelle-Aquitaine robotics platform

AI/Data

Around one hundred companies in Nouvelle-Aquitaine

Digital Aquitaine **AI data sciences cluster**

Bordeaux Artificial Intelligence Alliance (BAIA) - Bordeaux University

Leaders: Ezakus - @t Internet - Composia - Dolist - Do You Dream Up - Cartegie - FieldBox.ai - Cheops Technology - Cogniteev - Wiidii - Clay - JobiJoba - Addinsoft - Geosat - ThinkDeep - Sophia Genetics - Synapse Medicine - Klarsen - Cibl'R- Thinkeo - I Sea - Volubile, etc.

Equinix **data center**

Regional AI research network (R3IA)

NAIA: Nouvelle-Aquitaine Artificial Intelligence Forum

Microsoft By Simplon AI school

National Graduate School for Cognitive Science
Master's degree in Innovation Economics and Strategic Intelligence

Cognitive Science and Technology Chair (ENSC)

3 accredited AI research chairs in Bordeaux
Data University - Data Science Institute
Trustworthy AI Chair (University of Bordeaux Foundation)

New Mobilities

Digital Aquitaine - TOPOS: Solutions and Services for Smart Mobility in Nouvelle-Aquitaine

Expertise: satellite guidance, electric mobility, smart transport systems (STS), decarbonized air transport

Pilot of the **ITS 4Climate** international initiative

Sailing: Beyond the Sea - Bluenav - Le Canopée, the first sailing cargo ship - Ibaña Boats - Kahe Nautic

Leaders: BMIA - Co-rider - RATP Smart Systems - Qucit - SA Gertrude - Vélos Jean Fourche- Pony - VUF Bikes, etc.

Smart Mobility and Transport Chair (ENSEIRB-MATMECA)

A future "living lab" devoted to smart transport

HEALTHCARE INDUSTRY AND E-HEALTH

An innovative Healthtech ecosystem +52,000 public and private jobs in Bordeaux Métropole

Bordeaux, 3rd most dynamic employment area for private healthcare job creation (2015-21)

Excellence sectors: pharmacy, bio-technologies, e-health and medical devices

AllisNA (Alliance Innovation Santé Nouvelle-Aquitaine), TIC Santé (Digital Aquitaine, ENTER), Polepharma GIPSO - Nouvelle-Aquitaine Health Industries

Main therapeutic fields: neuroscience, cardiology, oncology, epidemiology, cellular therapies

An industrial research center: Ceva, Sanofi, Viatri, Merck Biodevelopment, Recipharm, Acteon
New incubator for healthcare: **Bordeaux Care Lab**

LOOP Santé: regional program to develop sustainable healthcare products

Station E-santé: third-party regional experimentation center for digital health

Locations: Bordeaux InnoCampus, Technopole Montesquieu, Bordeaux Unitec

Project to convert the Robert Picqué military hospital into a business hub

Industrial leadership

- Pharmacy and animal health
- Biotechnologies
- Cosmetics
- Medical devices, biomaterials and implants
- E-health, including hospital IT
- Bio-laser printing technology

Training

► **University of Bordeaux Medical School: 19 specializations, 280 graduates**

- Master's degrees: Public Health Data Science, Drug Science, Pharmacology, Neuroscience, Public Health
- Medical Surgery School
- Institute for Medical Professions (IMS), leading body for healthcare training (University Hospital)
- ENSTBB (Bordeaux National Graduate School of Biomolecular Technology)
- Bordeaux Institute of Industrial Pharmacy - IPIB
- ISPED (Institute for Public Health, Epidemiology and Development)
- Bordeaux School of Neuroscience
- School of Health Sciences (ESS)
- Institut Européen de Management de la Santé

Research

- **2,500 public researchers**, including 700 in neuroscience and 150 in cardiology
- 35 research laboratories, 11 platforms
- **CHU Bordeaux** university hospital: 400 researchers and 4,700 scientific publications
- **National Institute of Health and Medical Research – INSERM**
- University Research School: **UBGSNeuro** (Advanced Graduate School "Bordeaux Neurocampus")
- **2 University Hospital Institutes:** Lyric

(cardiology) and VBHI (cerebrovascular health)

► **Oncology:** Bergonié Institute, Oncology center for the greater south-west region

► **Human nutrition:** Human Nutrition Research Institute - ITERG (Institute for Fats, Oils & Related Products)

Sector organizations

- Biotech Center Nouvelle-Aquitaine
- CGFB (Bordeaux Centre for Functional Genomics)
- PTIB (Technological Platform for Biomedical Innovation)
- BIC (Bordeaux Imaging Center platform)
- MATWIN, French platform for open innovation in oncology
- Gerontopôle Nouvelle-Aquitaine
- Biotech transfer unit - ENSTBB
- Cosmetic Valley, Polepharma and BioLead competitiveness cluster branches

Leading companies

- **Pharmaceuticals:** Boiron - Ceva Santé Animale - Creapharm - Dagard - Meda /Viatri - Recipharm - Sanofi - Unither
- **Medical devices:** Acteon - Exactech - Certis Therapeutics - Companion Spine - Emagina - FineHeart - Germitec - HyPrevention - Implanet - InHeart - Intuitive Surgical - Steris - Stryker - Ocean Dx
- **Biotechnology:** Ademtech - Aelis Farma - Fermentalg - Imagene - ImmunRise - Merck BioDéveloppement - Poiëtis - TreeFrog Therapeutics
- **E-health:** BioGuid - Dedalus - CIS Valley - eDevice - DESKi - EyeSoft - Enovacom (Nehs Digital, Xperis, Exelus) - MainCare (Docaposte) - Meditec - MirambeauAppcare - Sophia Genetics - Interaction Healthcare/SimforHealth - Satelia - Synapse Medicine -- Invivox - Nurea - Noé Santé
- **Nutrition:** Activ 'Inside - Nutrikeo - Vitagermine - Exinnov
- **Cosmetics:** Cosderma - Herbéo - Omum - Groupe Panther - ADOPT - OceoPin - L'Oréal



GREENTECH - ENERGY

Certified as a Territory Committed to the Environmental Transition Climate - Air - Energy

More than 50,000 jobs in the green economy (Aurba) Nouvelle-Aquitaine, 2nd region for amounts invested in sustainable industries since 2009 (Trendeo)

2 energy clusters: Energy & storage, E-Clide (nuclear)

Soltena cluster (Solutions for Environmental Transition in Nouvelle-Aquitaine) and ACD Sustainable Chemistry

Néo terra 2: regional road map for energy and environmental transition

Terra Energie, a regional investment fund for renewable energy

Fundraising: Toopi Organics, Newheat, Dionymer, ByciCompost, CarbonWaters, Valorem

France's leading solar energy and bioenergy producing region (RTE)

Horizéo project: France's largest solar farm

Dedicated sites: AMPeRIS, Ecoparc, Parc Eunice Newton, Copernic, Technopole Montesquieu, l'Agora, etc.

Vitisolar: an experimental project for agrivoltaics in the vineyards around Bordeaux

Transitions incubator (Unitec)

InnoGaronne: a new hub for the transition to decarbonization

GH2 project, developer of renewable hydrogen projects with the Bordeaux Maritime Port

Electric mobility: ACC-Serma partnership for battery testing

Michelin: First industrial demonstrator to produce butadiene from bio-sourced ethanol

Soren/ Envie 2E: First photovoltaic panel recycling plant

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

Leadership

- Organic and hybrid solar energy
- Batteries and storage of energy (see page 21)
- Hydrogen / Biogas
- River tidal turbine (SEENEHO site)
- Seaweed processing

Training

- School for Energy Renewal (èRE)
- ESTACA, a new course on decarbonizing the aeronautics sector
- National Graduate School for Environmental Studies, Geo-resources and Sustainable Development Engineering (ENSEGID)
- Master's in Environmental Engineering and Adaptation to Climate Change
- National Graduate School for Materials, Agri-food and Chemistry (EMAC)
- Sciences & Environments doctoral school

Research

- 250 researchers, PhD students, 20 laboratories
- INRAE Bordeaux, plant, ecology and environmental science, agri-photovoltaics
- Geological and Mineral Research Office (BRGM)
- Carnot Institutes: ISIFOR (sustainable geo-source engineering) and IRSTEA (environmental science and technology)
- Institute of Condensed Matter Chemistry of Bordeaux (ICMCB)
- IFREMER
- Aquitaine Observatory for the Sciences of the Universe (OASU), 300 researchers

► Environments and Oceanic & Continental Paleo-environments (EPOC)

► LabEx COTE (Interactions between continental and coastline ecosystems)

Sector / Transfer organizations

- Ademe (Agency for Ecological Transition)
- Nouvelle-Aquitaine Environment / Water Center
- Nouvelle-Aquitaine carbon climate environment association
- Bordeaux Métropole Energies (BME)
- Gironde Energie

Leading companies

- **Renewable energy:** ADV Tech, ArcelorMittal Exosun - BASE Innovation - Énergie de la Lune - Hace - HDF Energy - Inélia - Instream - Logikko - Moon - NewHeat -- Seaturns - Sunbooster - Sunna Design - Valorem - Vinea Energie - Singulair
- **Energy storage:** ACC - E-Mersiv - EvBox - Exoes - Goupil - Groupe St@rtec Energy (Neogy, BMS PowerSafe, Clairitec) - Nexeya - SERMA Energy - Saft - SwitchESS - Volteo
- **Waste recycling:** Bee and Co - Bicycompost - Derichebourg Environnement - Dionymer - Pena - Europlasma - Moulinot - SIAP Prociner - Toopi Organics - TriGironde
- **Seaweed:** Fermental - CarbonWorks - SVABA
- **Engineering:** Cap Ingelec - SERMA Group - Naldeo Technologies & Industries - Amoès - Alto Step - Ingerop

WOOD SECTOR / SUSTAINABLE BUILDING

Competitiveness cluster: XyloFutur – Products and Materials from Planted Forests

Odéys cluster (eco-building and sustainable development)

Home to France's largest forest in terms of surface area and largest certified and sustainably managed forest

80% maritime pine in Gironde and Landes

The region's 4th industrial sector in terms of employment (50,000 direct jobs)

€10M turnover, 3rd largest regional export sector
France's leading region for production and 2nd for timber processing

Alliance Forêts Bois (Forest & Wood Alliance), France's largest forestry cooperative

Events in Gironde: Woodrise international congress, FOREXPO

InnoGaronne: innovation and economic transition cluster (Arc Rive Droite)

Future cluster for eco-construction with wood

Bordeaux Euratlantique: construction of 3 buildings using local wood

Leadership

- ▶ Green chemistry and wood biorefinery
- ▶ Flooring, paneling and molding
- ▶ Wooden packaging and pallets
- ▶ Cooperage - Wine cases
- ▶ Paper - cardboard:
- ▶ Timber for building

Training

- ▶ Forestry and wood campus (professional diplomas from undergraduate to postgraduate levels)
- ▶ Professional Degree in wood construction - IUT Civil Engineering Bordeaux
- ▶ University Degrees in forest law and management
- ▶ Bordeaux Arts et Métiers Paris-Tech - ENSAM
- ▶ National Graduate School for Architecture and Landscape - ENSAP
- ▶ Bordeaux Agricultural Science: Forest and wood training platform
- ▶ Master's in Sustainable Forest Management
- ▶ Master 2 in Wood and Fiber Engineering
- ▶ Ifabe (training institute dedicated to eco-construction)

Research

- ▶ France's leading region for research in the wood / forestry sector
- ▶ More than 200 researchers
- ▶ Inrae - International forest research center
- ▶ Nobatek / INEF4 - National Institute for Energy and Environmental Transition in Building
- ▶ Xyloforest platform for research and innovation (Inrae), 14 research laboratories
- ▶ Environmental and Agricultural Sciences and Technologies Research Institute (IRSTEA)
- ▶ The Institute of Mechanical Engineering (I2M)
- ▶ European Institute of Planted Forest (IEFC)

- ▶ Maritime Pine Chemistry Chair (Solvay, Bordeaux University Foundation, INP)
- ▶ E2WP - Eco-Engineering Wood Products Chair (University, I2M)
- ▶ BioForTer Chair (Bioeconomy, Forests and Territories) certified by Xylofutur

Sector organizations

- ▶ Cobaty Bordeaux Métropole
- ▶ European Institute of Planted Forest (IEFC)
- ▶ Fibois Landes de Gascogne
- ▶ FCBA Technological Institute
- ▶ Union of Regional Maritime Pine Industries (UIRPM)
- ▶ National Forests Office (ONF)

Leading companies

- ▶ **Paper - cardboard:** Adam – Alterkraft -Condat (Lecta Group) - Gascogne Papier – Smurfit Kappa Papier Recycle France – Korus Packaging
- ▶ **Packaging** (paper bags, wood, pallets, etc.): PGS Beynel - Gascogne Sacs - SOPAL - Smurfit Kappa Corrugated France - Saica Pack
- ▶ **Cooperage:** Demptos, Sylvain - Nadalié, - Seguin Moreau - Tonnellerie Bordelaise, etc.
- ▶ **Cardboard tube manufacturing:** Abzac - Corex
- ▶ **Panels, flooring, molding and resin-based paneling:** Gascogne Bois - FP Bois, Egger Panneaux & Décors - Finsa, Nankai Plywood
- ▶ **Building, carpentry:** Integral Bois System (Groupe Egeris) - So Deck – Koji – Lamécol - Discac - DL Menuiserie ...
- ▶ **Sustainable building:** BackPlan - Coop&Bât – IQSpot - Qucit - MyOlympe - Vertige – Vegetek - Woodscope
- ▶ **Wood chemistry /Biorefinery:** Berkem - DRT - Rayonier Advanced Materials (R&D center)
- ▶ **Engineering:** Valmet Automation, Dimétal, Ciris Ingénierie, SGM Industry



CHEMISTRY - MATERIALS

Competitiveness clusters: Aerospace Valley, Xylofutur

Clusters: ACD sustainable chemistry Nouvelle-Aquitaine, Cluster Composites Nouvelle-Aquitaine
+12,000 employees, 460 establishments, 17 with more than 100 employees (Gironde)

Private international R&D centers: ACC, ArianeGroup, Eurovia, Saft, Suez, Safran - Smurfit, Solvay

Among the top 3 regions for researcher density in material science and physics-chemistry

Internationally renowned public research laboratories: materials, environment, polymers, analytical chemistry and industrial safety, use of agricultural biomass and forestry

Leading region for technological patent files

Michelin, first bio-sourced butadiene demonstrator

InnoGaronne: cluster for the transition to decarbonization

Leadership

- ▶ Chemistry and bio-sourced materials
- ▶ Lignocellulose chemistry
- ▶ Chemistry for energy
- ▶ Agri-chemistry, xyl-chemistry
- ▶ Plant chemistry, Micro-algae, plant extraction
- ▶ Fuels and explosives
- ▶ High-performance materials, thermo-structural materials

Training

- ▶ University of Bordeaux: 5 Master's specializations in chemistry and materials
- ▶ National Graduate School for Materials, Agri-food and Chemistry - ENSMAC
- ▶ Bordeaux National Graduate School for Biomolecular Technology - ESTBB
- ▶ Chemical Science doctoral school
- ▶ IUT/Professional degrees: materials engineering, plant resource development

Research

- ▶ "Chemistry and Self-assembly" Chair (Solvay)
- ▶ AMADEus Excellence Laboratory, Investissements d'Avenir winner in the advanced materials sector
- ▶ Consortium of 130 researchers and teacher-researchers 12 partner laboratories including:
 - European Institute of Condensed Matter Chemistry of Bordeaux (ICMCB)
 - Institute for Molecular Science (ISM)
 - European Institute for Chemistry & Biology (IECB)
 - Integration from Material to Systems Institute (IMS)
 - Thermo-structural Composites Laboratory (LCTS)
 - Organic Polymer Chemistry Laboratory (LCPO)
 - Laboratory of the Future, Solvay

Technology transfer

- ▶ Nouvelle-Aquitaine Technological Center for Composites and Advanced Materials (Canoe)
- ▶ ChemInnov Platform
- ▶ Xylochem: chemistry and wood bio-refinery
- ▶ Apesa, a technology center serving transitions
- ▶ ITERG: Institute of Oils & Fats

Sector organizations

- ▶ France Chimie Nouvelle-Aquitaine
- ▶ ACD Nouvelle-Aquitaine – the chemistry and material sector cluster

Leading companies

- ▶ **Waste treatment and 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 (SEDE Environment Group), etc.
- ▶ **Green chemistry / Bio-sourcing:** Activ'Inside - Bertin Technologies - Berkem - Biolandes - Biovitis - Carbon Waters - Dionymer - DRT - Exinnov - Fermentalg - Firmenich - Immunrise - Jade - Lixol - Planet Agro - Polyrise - Olikrom - Saipol - Kapsera - Ugiel - Starfish Bioscience
- ▶ **Fine chemistry:** Arkema - Emulseo - Kurita - Laffort - Nouryon - Novéal - Michelin- Sanofi
- ▶ **Composites and polymers:** AEC Polymers (Bostik) - CMP Composites - PolymerExpert - Rescoll - Plastinova - Epsilon Composites - MLPC International - Safran Ceramics - Airbus Atlantic Composites - Strato Compo - Toray - Carbon Fibers Europe - Natec - Ollow
- ▶ **Agro-chemistry:** Yara France, UPL France

WINE SECTOR

Innovations and Excellence

World N°1 region for AOC appellation wine production, 65 AOCs

112,000 hectares of vines, 15% of French vineyards

No.1 organic winemaking department in France

5,400 wine-making estates, 9000 château names

€4.5 billion turnover, 1/3 of Gironde exports, No.1 exported product

The department's leading employer, with 50,000

direct and indirect jobs

300 trading businesses, 80 merchants and brokers.

Regional Vine and Wine Campus

VitiREV Innovation devoted to funding environmental transition in the wine sector

Vitisolar: an experimental project for agrivoltaics in the vineyards around Bordeaux

Bordeaux Cultivons Demain certification for CSR companies (CIVB)

Innovation / Research

► **Bordeaux INNO'VIN cluster**

► **Agri Sud-Ouest Innovation competitiveness cluster**

► **Bordeaux WineTech Association**

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

► Wine incubator: **Startup'Win** (Château le Sartre, Bernard Magrez)

► **Winehub**: the first coworking and events space

► The Institute of Vine and Wine Science (ISVV)

► Vinopôle Bordeaux-Aquitaine

► National Research Institute for Agriculture, Food and the Environment (Inrae)

► Wine, Vineyard and Societal Trends Chair (Vitirev)

► **Academic expertise:** oenology, grape biochemistry, microbiology procedures

Events

► Bordeaux Fête le Vin - wine festival

► Vinexpo Wine Paris

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

► Independent Winegrowers' Fair

Training

► KEDGE Wine School

► INSEEC Bordeaux, wine and spirits programs

► International School for Sommeliers

► Best - Worldsom , excellence program for sommeliers

► European Master in Viticulture and Oenology, Master in Wine Law

► Master WINTOUR, Erasmus Mundus for innovation in wine tourism

► Bordeaux Sciences Agro - Specialized Master's

Degree in Vineyard Management

► Bordeaux Local Public Establishment for Agricultural Training (EPLEFPA)

Players in Gironde

► Bordeaux Wines Inter-professional Committee - CIVB

► Great Wine Capitals, Best of Wine Tourism

► Cite du Vin, certified "Sustainable Entertainment"

► Bordeaux Federation of Fine Wines (FGVB)

► Union des Grands Crus de Bordeaux

► Regional union of wine and spirit brokers

► Gironde Chamber of Agriculture

► Vinexposium

Key companies

► More than 150 Chinese investors in the Bordeaux vineyard

► **Winetech:** LaDegust.fr - SmartBottle - Winespace - Process2Wine - Ekylibre - My Balthazar - Vitibot - My Bachus - Deep Planet - Mo.Del - Vegetal Signals - Chouette

► **Trading and logistics:** Bardinet - Castel - Barton & Guestier - Ginestet - Lillet, - Johannes Boubée - Dartess - Millésima - Ricard - William Pitter - U' Wine

► **Oenology:** Laffort Oenologie - Laboratoire Excell - WIT France - Michael Paetzold - Oenosens

► **Cooperage, cases:** Adam - Mauco Emballage - Seguin Moreau - Nadalié - Radoux



AGRI-FOOD

Agri Sud-Ouest Innovation competitiveness cluster

Bio-control and bio-solutions cluster

France's 2nd largest agri-food and farming region

Gironde: **France's 3rd - ranking department for organic produce**

Nearly 10,000 employees and 1,000 establishments in Gironde (INSEE)

Leading regional export sector (incl. agriculture), €8.6 billion in goods exported (2022)

Leading French region for quality certifications: 295 products (AOP, IGP, etc.)

27 major international groups located in the region

High-level industrial expertise in bio-production, extraction, nutrition and food storage, nutrition and brain function, fat and oil technologies

Food and Wine Tech nursery in Libourne (Technowest)

1st university chair for organic agriculture (Bordeaux Sciences Agro)

Strategy for agricultural food resilience implemented by Bordeaux Métropole

Food excellence center, extension of the Market of National Interest (MIN)

Fields of excellence

- ▶ Fats, food lipo-chemistry
- ▶ Food quality and safety, toxicology
- ▶ Food processing technologies
- ▶ Health nutrition, genetic traceability
- ▶ Plant biotechnology, species selection

Training

- ▶ Bordeaux Sciences Agro - National Graduate School for Agronomic Sciences
- ▶ National Graduate School for Materials, Agri-food and Chemistry - ENSMAC
- ▶ Bordeaux Higher National School for Biomolecular Technology (ENSTBB)
- ▶ Agri-food Industry Regional Training Institute - IFRIA Aquitaine
- ▶ Bordeaux Institute of Natural Science and Agri-food - ISNAB
- ▶ Culinary Institute of France

Sector / Transfer organizations

- ▶ Nouvelle-Aquitaine Food Agency (AANA)
- ▶ Regional Association of Food Industries - ARIA Nouvelle-Aquitaine
- ▶ Technological resource centers: AGIR (Agri-food Innovation & Research)
- ▶ ITERG CTI: leader in fat and protein recycling
- ▶ Terres Inovia Institute: Institute for plant and hemp oils & proteins
- ▶ FranceAgriMer
- ▶ INRAE Transfert: engineering company for innovation

Research

- ▶ National Research Institute for Agriculture, Food and the Environment - INRAE

- ▶ Institute of Oils & Fats – ITERG
- ▶ French Oceanic Studies Research Institute - IFREMER
- ▶ Human Nutrition Research Institute of Aquitaine – IRNHA
- ▶ Institute for Bio-chemistry and Cellular Genetics – IBGC
- ▶ Fruit and Vegetable Research Center - INVENIO

Leading companies

- ▶ **Agro-ecology:** Comerso - Ondontella - BoxEaty - TriDifoodies - Koovee - Palladines - PlanetAgro - Les Nouvelles Fermes - Kanopee Concept - Vegetal signals
- ▶ **Biscuits and chocolate:** CEMOI - Jock - La Compagnie du Biscuit - Mondelez France Biscuits - CPVD/Foulon - Nouvelle Maison Seguin - Delidess - la Toque Cuivrée -
- ▶ **Beverages:** La Martiniquaise - Cafés Michel - Les Eaux Minérales d'Arcachon - Lillet - Pampryl - Ricard - Meneau - Moon Harbour - Hysope - Mama Kombucha - Destination BIO (Ecotone)
- ▶ **Caviar and fish:** Sturgeon - Caviar Perlita - Frigor - SAR Ocean
- ▶ **Dairy products:** Cacolac - Le Petit Basque - Froneri
- ▶ **Preserves and meats:** Bonduelle - Delpéyrat - Labeyrie - Lou Gascoun - LDC Aquitaine
- ▶ **Oils:** Lesieur - Saipol
- ▶ **Nutrition:** Fallières Nutrition - Nutrikeo - NutriDry - Vitagermine - Yooji - Ultra Premium Direct, etc.
- ▶ **Active ingredient suppliers:** Activ'Inside - Exinnov - Fermentalg - Naolys - Laboratoire Phenobio - Saf-Isis - Pollenenergie
- ▶ **Trade:** Touton SA

TOURISM

“Innovative Sustainable Destination” certification

Nouvelle-Aquitaine: France’s leading tourist region, 47 million overnight stays (summer 2023)

Bordeaux Métropole, ranked 9th in the global ranking of sustainable destinations (GDS Index 2023)

Top position in the “greenest cities” ranking

2nd Atlantic port for sea cruise stopovers

Emergence of an equestrian economic sector (LIM group, Blue Horse, etc.)

Nouvelle- Aquitaine Croissance Tourisme (NACT), Regional Investment Fund

200 eco-certified leisure and business facilities in the metropolitan area

Major events in 2024: Bordeaux Fête le Vin, Olympic and Paralympic Games, Jumping International, Decastar, Fest’Arts, Scènes d’Eté en Gironde

1st regional incubator for tourism activities: TiPi 535

Tourisme Lab Nouvelle-Aquitaine: a laboratory for tourism innovation

“RESSOURCES 2027”, the new road map for Bordeaux Airport

Professional events: Congress of the EAHP - European Association of Hospital Pharmacists, Congress of Notaries, Vinitech-Sifel, Congress of the French Arthroscopy Society, etc.

Excellence training: Vatel Hotel Management School, Culinary Institute of France, Lake Campus - Ferrandi Bachelor, school for sommeliers, etc.

Tourism economy

- ▶ 9% of regional GDP
- ▶ 10.3 M tourists in Gironde (2023 season)
- ▶ 7 million commercial overnight stays in the Bordeaux metropolitan area (2023, +8%)
- ▶ €3.3bn in revenue
- ▶ 40,500 tourism jobs in Gironde (annual average), 6.9% of total employment
- ▶ **A growing number of hotels**, 6th largest department in France

Business travel destination

- ▶ France’s 5th host city for international conferences, in terms of number of events
- ▶ **10 conference centers:** Bordeaux Congress Center, Bordeaux Exhibition Center, Palais 2 L’Atlantique, Palais de la Bourse, Cité Mondiale, Arkea Arena, Rocher de Palmer, Pin Galant, Arcachon Congress Center, etc.
- ▶ A new exhibition center for 2030
- ▶ Bordeaux Metropole hosted 3,860 events and 608,536 conference days in 2023

Leadership

- ▶ Gastronomy tourism
- ▶ Heritage tourism
- ▶ Wine tourism
- ▶ Cruise ship stopover
- ▶ Golfing destination
- ▶ Coastal tourism: Nautical and surfing activities
- ▶ Business tourism

Attractiveness of the Gironde area

- ▶ France’s leading wine tourism destination
- ▶ The French department with the highest number of historical monuments
- ▶ **The 4 most visited sites:** Dune du Pilat, Bassin des Lumières, Citadelle de Blaye, Cité du Vin
- ▶ 6 Vignobles & Découvertes-certified destinations (“Vineyards & Discoveries”)
- ▶ 160km of GR® hiking paths in Bordeaux Métropole, 1,500km in Gironde
- ▶ 150 parks and natural spaces open to the public
- ▶ **Leading national network of cycle paths** (700 km of departmental cycle paths)
- ▶ 125 kms of coastline in Gironde
- ▶ 14 UNESCO World Heritage sites, including Bordeaux

Players

- ▶ Bordeaux Métropole Tourist Office and Congress Office (OTCBM)
- ▶ Bordeaux Events and More
- ▶ Gironde Tourism
- ▶ Bordeaux Ambassadors Club



FINANCE/FINTECH

Financial hub

3rd most dynamic region in France for fundraising in 2023 (InExtenso)

- 70 projects in Nouvelle-Aquitaine, 48 in Gironde, for an average value of €5M
- TOP 3 sectors in €M invested: Cleantech, tourism, space

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

Financial and Insurance activities: 26,995 employees and 3,061 establishments (INSEE) in Gironde

A leading metropolis for Fintech, Legaltec and Insurtech start-ups

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

CF Group, France's leading independent accounting firm

Specialized service providers: DocOne – Cartégie – InfleXsys – Pouey International

Training

- **University of Bordeaux:** around 60 master-level specializations in law and economic science
- Master's in Insurance, Banking & Finance
- Master 2 in Finance 3.0
- Master's in Innovation Management and Fintech (ESSCA)
- MsC Banking and Finance (KEDGE)
- Master of Science 1 in Finance, Law, Taxation and Assets (INSEEC)
- **Business Administration Institute (IAE)** – Master's in International Management International & Finance
- **Ynov Campus** – Expert Master's in Information Systems Development
- **More than 10 Business schools** including KEDGE BS, INSEEC, ESG, ESSCA, ISG, IDRAC, ISEG Marketing
- National Graduate School of Banking
- Bordeaux Political Studies Institute
- NoSchool (work-study programs in insurance and banking)

Research

- Bordeaux Economic Science Center (BSE - University of Bordeaux) - 160 researchers and teachers
- VIA INNO, platform with initiative excellence accreditation
- Banking and Finance Research Chair (Corporate University Foundation)
- Bordeaux Laboratory for IT Research - LaBRI
- INRIA Bordeaux- South-west research center

Leading companies

Insurance

- **Headquarters:** Filhet-Allard, Filhet-Allard Maritime - AMV (Assurances Moto Verte,

headquarters) – Axa Wealth Services – Eurodommages – Sompco Japan Nipponkoa Martin & Boulart SAS (France headquarters) – SPB Family, etc.

- Management centers: Adenes - Gan Groupama - Gras Savoye - Hiscox Assurances – MGEN - Natixis Assurances – Pacifica - Pro BTP, etc.

Banks

- **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.

- **State banks:** Bpifrance, Banque des Territoires, Banque de France, Caisse des Dépôts

- **Business units / Service centers:** IS dept. of La Banque Postale and Réseau La Poste- BNP Paribas BDDF - BNP Paribas Personal Finance - GIE AGIRC-ARRCO - Caisse des Dépôts (pension and solidarity department / IT CDC) - PwC expertise center, etc.

- **Private and asset management banks:** Champeil - Indosuez Wealth Management - Edmond de Rothschild - Gresham Banque Privée - Lazard Frères Gestion - Meeschaert - Milleis Banque - Neuflyze OBC - Rothschild Martin Maurel - Société Générale Private Banking - UBS Banque etc.

Capital investment

- **Bank subsidiaries:** Arkéa Capital - BNP Paribas Développement - Crédit Mutuel Equity - GSO Capital - Ouest Croissance - Société Générale Capital Partenaires, etc.

- **Local management organizations:** Aquiti Gestion - Galia Gestion - IRDI capital Investissement- iXO Private Equity - Newfund, etc.

- **Regional authority-initiated funds** (NACO, VitiRev, etc.) and a fund of funds: Nouvelle Aquitaine Participations

- **National investors:** Demeter - Turenne Capital - Yotta Capital Partners, etc.

- **Participation and corporate venture holdings:** Bernard Magrez – Groupe FIB - Nisima - Fayat Acceleration Startups – Résilience (Touton), etc.



► **Business angels network:** Arts et Métiers Business Angels Sud-Ouest - Club des Prophètes - Femmes Business Angels (FBA) - Finaqui Business Angels, Héméra, KEDGE Business Angels, etc.

► **Crowdfunding platforms:** HelloAsso - Happy Capital - Lumo - Solyend - Tudigo, etc.

► **Audit & consultancy:** Deloitte - EY - KPMG - Mazars - PKF Arsilon - Compagnie Fiduciaire... More than 30 M&A consultancies and specialist Tax & Legal law firms

► **Fintech-Legaltech-Insurtech:** L'Addition - Ashler & Manson - Evollis - Ejara - Fridaa Green- LGO - IBEx (Formerly Inblocks)- InfleXis - LegalVision

- MyPension - Pandat Finance - NEAT - Obvy - Soan Solutions - Shoyo - Trésoria - Veracash - Widmee - WeLyb, etc.

Representative Bodies, and professional orders

► Bordeaux Place Financière et Tertiaire (BPFT) (Financial center and tertiary activities)

► Greater Aquitaine Regional Society of Auditors

► Nouvelle-Aquitaine Board of the French Banking Federation

► Aquitaine Region Order of Accountants

► Nouvelle-Aquitaine Association of Financial and Management Control Directors

LOGISTICS & TRANSPORT

Multimodal logistics platform

More than 37,000 private employees in the transport and warehouse sector in Gironde, 1,592 establishments

Major logistics sites: Naviland cargo combined container terminal (Hourcade) - Bordeaux Fret - 7 port zones - airport platform - MIN - Cestas Pot au Pin - Parc Logistique du Médoc - Inno Garonne...

Bordeaux Port Atlantique, industrial and logistics platform

Forthcoming Coutras logistics platform

Bordeaux TechnoPorts: the Bordeaux Maritime Port / Technowest incubator

New Colissimo platform for parcel sorting and delivery (19,000 parcels per hour)

Urban Logistics Club (Bordeaux Métropole and CCI Bordeaux)

La Poste Group's urban logistics cluster

Training and research

► Graduate School for Industrial Logistics (ISLI), 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 Logistics Process Management

► Technology Institute for Logistics and Transport Management (IUT)

► AFTRAL Bordeaux

► SNCF Réseau Campus (rail networks)

► Doctors Without Borders (MSF) training center

► Smart Mobility and Transport Chair (ENSEIRB-MATMECA)

Specialist logistics for industrial sectors

► Wine and agri-food

► Automobile / nautical

► Pharmaceutical / healthcare

► Aeronautics / Maintenance / Outsourcing

► Humanitarian activities

Local logistic operators

Boueix Logistique - Ciblex - Daher Aerospace - Dartess - DHL - Geodis - Groupe GT - Guyamier - Lacoste - Schenker - Olano - Sea-Invest - STEF-TFE - Montané - Heppner - Le Roy Logistique - PHM Group - Rhenus - SELI - STERNE - Sofrilog - UPS - Veynat - XPO Logistics - Ziegler, etc.

Regional user logistic platforms

Aldi, Auchan Logistique, Airbus, Akidis, Axial, Base MSF Logistique, Ballande & Meneret, Banque Alimentaire, GXO Logistics, Castel, Cdiscount, CVBG, Decathlon, ELAN, 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.

Last mile logistics

Deret - TR Express - DB Schenker - La Poste - Les Triporteurs Bordelais - Urby - Uber - Deliveroo, etc.

e-Logistics

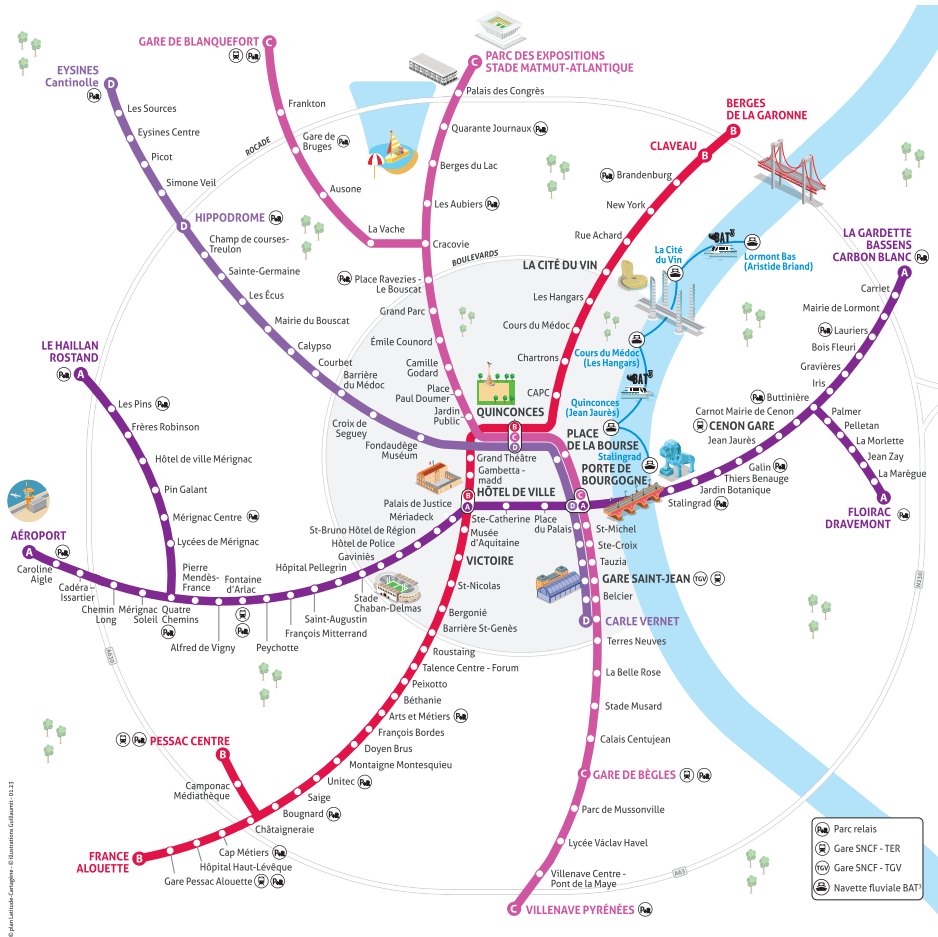
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METROPOLITAN EXPRESS RAIL NETWORK



Source: RER Métropolitain Bordeaux Nouvelle-Aquitaine.

TRAM NETWORK



Source: Keolis Bordeaux Métropole Mobilités

INVEST IN BORDEAUX: WHO ARE WE?

Created in 1996 at the initiative of local municipalities (Ville de Bordeaux, Bordeaux Métropole and Région Nouvelle-Aquitaine) and the CCI Bordeaux-Gironde, **Invest in Bordeaux is the agency for sustainable and responsible economic development in Bordeaux and Gironde.**

Formed as an association, the agency is co-financed by the European Union and supported by over 150 members. Its services are confidential and free of charge.

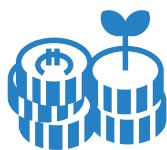
Our priorities

- Expansion of the metropolitan area and balanced development of the Gironde region.
- Integrating the economic, social and environmental impact of projects.
- Establishing local ties for businesses following their move to the area

Our service Offer



Preselection of sites and advice on where to locate business



Funding solutions



Guidance in HR and mobility aspects



Information on the local economic sphere



Integration in the local ecosystem

Our websites

<https://investinbordeaux.fr>

<https://bordeaux.finance>

<https://www.vivre-bordeaux.com>

<https://jobinbordeaux.fr>

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MAIN MEMBERS 2024

MEMBRES BIENFAITEURS



ADHÉRENTS PACK CONNEXION



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