



AGENCE D'ETUDES ET DE PROMOTION DE L'ISERE

2012 edition

Key figures Grenoble Iserere



www.grenoble-isere.com

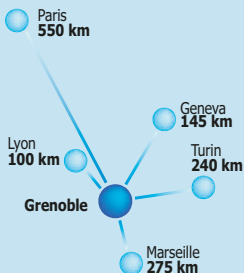
A prime location

■ Grenoble-Isere stands at the heart of Rhone-Alpes,

- 2nd largest regional economy after the Paris area
- 4th largest regional economy in the European Union
- Among the top five travel destinations in Europe (*Eurostat*)

Grenoble and Lyon, two cities of European standing in the Rhône-Alpes region.

■ Grenoble-Isere, an Alpine crossroads

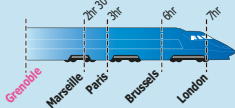




A location with an international dimension

Motorway and rail infrastructures for access to all major European capital cities and airports serving destinations all over the world.

• TGV

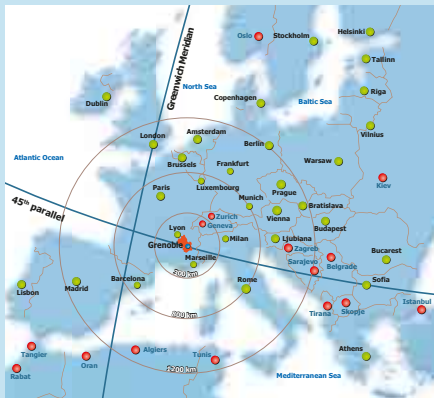


An attractive location

- 708 foreign-owned companies
- Four of 7 major international research facilities in France, including the ESRF, ILL and EMBL
- 9,000 foreign students, accounting for 15% of Grenoble-Isere's student population
- An international secondary school and several international primary schools, with 1,500 pupils in all
- 100,000 visitors come to GIANT Campus each year

• Airports

- Grenoble: 353,400 passengers
- Lyon Saint-Exupery: 7,980,000 passengers France's third airport
- Geneva: 11,880,400 passengers
- Marseille: 7,522,000 passengers



(Number 2010)

Exceptional quality of life

- A natural environment consisting of plains and highlands
- Easy access to top ski resorts and the Mediterranean
- A top grade public transport system
- Cultural and sports facilities in line with the demands of an active, innovative, cosmopolitan population
- A wide range of accommodation, in the city and outskirts, but also in the surrounding hills

Lively art scene

- Entertainment: Cabaret Frappe, Berlioz Festival, Jazz Festival in Vienne, Festival of Europe Theatre in Grenoble, etc.
- Famous public figures: Hector Berlioz, Champollion, Condillac, Olivier Messiaen, Emmanuel Mounier, Stendhal, etc.
- Contemporary creative artists: Christiane Blaise, Jean-Claude Gallotta, Sylvie Guillermin, Marc Minkowski, Laurent Pelly, Pep's, Samuel Rousseau, Djazia Satour, Sinsemilia, Calogero, etc.

A wide range of sports

- Events: Free Flight World Championships, Jumping International, Criterium du Dauphine cycle race, Marmotte, Foulee Blanche, Traversee du Vercors, etc.
- Famous athletes: Brahim Asloum, Sylvain Calzati, Daniel Du Lac, Anne Floriet, Jeannie Longo, Julien Loy, Frederic Maugiron, Carole Montillet, Jerome Neuville, David Smetanine, Bernard Thevenet, etc.

In Grenoble

- MC2 art centre
- Le Summum hall seating 5,000 people
- Musee de Grenoble, France's top provincial art museum
- Indoor skating rink covering 7,500 sq m
- City stadium, seating 20,000



**Les Ecrins,
national park**
**Chartreuse and Vercors,
regional natural parks**

- 8,250 km of marked out foot paths
- Two spas and health resorts
- Summer tourist traffic (market sector): 2.96 million nights (Summer 2010)

Insee/CDT Isere 2010

Travel destination

7th in ranking for winter visitors,
26th in ranking
for summer visitors

Accommodation

- 266 hotels, including seven 4-star establishments
- 124 certified camp sites

Winter sports

- 22 winter sports resorts
- 30 cross-country skiing centres
- Winter tourist traffic (market sector): 4.2 million nights (Winter 2009/2010)

Summer holidays

- More than 100 lakes, including 27 water sports facilities
- 11 golf courses

Business travel

- 3 convention centres with capacity of up to 3,000: Alpexpo, World Trade Center, and Maison MINATEC
- 5 halls with capacity in excess of 1,000 people in nearby towns Allevard, Corbelin, Morestel, Porcieu-Amblagnieu and Vienne
- Local congress board to assist organizers with their meetings and events in Grenoble
- A range of unique locations to make your events memorable: the fortifications at La Bastille, the Stade des Alpes stadium, St. Cécile's chapel, the Chartreuse distillery, and National Centre for Contemporary Art "Le Magasin".



Main features



■ Grenoble, France's capital of hydroelectric power, cement and metallurgy

- 1907** • Start of Rossignol
- 1917** • Start of Neyrpic (now Alstom Power Hydro)
- 1920** • Start of Merlin Gerin (now Schneider Electric)
- 1925** • Hydroelectric power world fair
- 1935** • First ski-lift manufactured by Pomagalski
- 1936** • A Raymond, automotive industry supplier
- 1946** • Start of CNRS (National Centre for Scientific Research)
- 1955** • Start of Sogreah
- 1956** • Start of CENG, now CEA Grenoble
- 1960** • Start of Caterpillar
- 1965** • Start of Becton Dickinson (BD)
- 1966** • Creation of ILL
 - Start of Pechiney's CRV research centre
- 1967** • Creation of Leti at CEA
 - Foundation of Sogeti, now Capgemini
- 1968** • Grenoble hosts Winter Olympics
- 1971** • Start of Hewlett Packard
- 1973** • Efcis, first Leti spin-off
- 1976** • Opening of Cnet, now Orange Labs
 - Start of Bull in Echirolles
- 1988** • Creation of SGS-Thomson, STMicroelectronics since 1998
 - Start of CRSSA

- 1990** • Start of Sun Microsystems R&D
- 1992** • SGS Thomson opens unit in Crolles
- 1994** • Opening of ESRF
- 1995** • Start of Inria in Montbonnot
- 1999** • Start of Soitec, spin off from Leti, in Bernin

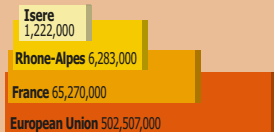
■ Grenoble, European capital of micro and nanotechnology

- 2001** • Launch of Minatec and Nanobio
- 2002** • Creation of Alliance, joint Freescale/Philips/STMicroelectronics R&D centre
 - Signature of Partnership for Structural Biology
- 2003** • Construction of Crolles2, a second STMicroelectronics fab
- 2005** • Minalogic, worldwide cluster in intelligent miniaturized solutions
- 2006** • Opening of Minatec
- 2007** • Grenoble Institute of Neuroscience
- 2008** • ST/IBM partnership Nano2012
- 2009** • ZAC de Bonne, 1st French éco-quartier
- 2011** • "Invest in the future" French government's economic stimulus package: €387m

Population and employment



Total population



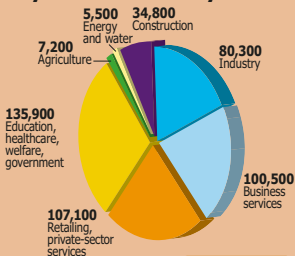
(Source AEPI/Insee/Eurostat)

Rhone-Alpes GDP

- Ranking **2nd** in France
- **10%** of French GDP
- €**181,810m**

(Insee, 2010)

Distribution of jobs by sector of activity



(AEPI/Pole Emploi/Insee 01.01.2011)

International Leaders

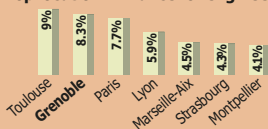
Schneider Electric	France	Equipements électriques	5,000-6,000
STMicroelectronics	France Italie	Microélectronique	5,000-6,000
Caterpillar	USA	Engins de terrassement	2,000-3,000
EDF	France	Energie	2,000-3,000
Hewlett Packard	USA	Informatique	1,000-2,000
BD	France	Matériel médical	1,000-2,000
STEricsson	France Italie Suède	Microélectronique	1,000-2,000
Tecumseh Europe	USA	Unités frigorifiques	900-1,000
Calor	France	Equipements domestiques	900-1,000

(AEPI/Pole Emploi 01.01.2011)

Workforce approx.

Characteristics of the Grenoble urban area

Top location in France for engineers



As a percentage of total jobs in urban area.
(Insee RP 2008/AEPI)

Qualified working population

28.2% of the Grenoble-Iserre population aged 15 or more had completed the equivalent of two years' higher education (24% for France).

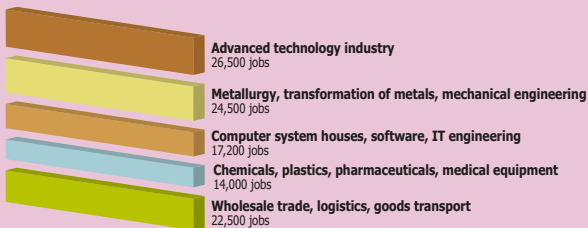
(Insee RP 2008)

Economic dynamism



Main activities making up the Grenoble-Isere economy

Industry and business services



(AEPI/Pole Emploi 01.01.2011)

Main industrial sectors

Advanced technology industry

Atral, Bull, Eaton, HP, Mafelec, Radiall, Rolls-Royce Civil Nuclear, Schneider Electric, Siemens T&D, Sofradir, Soitec, ST Ericsson, STMicroelectronics, Thales Electron Devices, Thales Avionics, Trixell, Ulis, Xerox...

Metallurgy, transformation of metals, mechanical engineering

Acieries et Laminoirs de Rives, Alfa Laval Vicarb, Allimand, Alstom, Ascometal, Acieries de Bonpertuis, Bourgeat, Boxal, Caterpillar, Dinac, Gindre Duchavany, Minitubes, Paturle, Poma, Sames Technologies, Sintertech, Tecumseh Europe, Winoa...

Wholesale trade, logistics, goods transport

Conforama, Decathlon, FM Logistic, GT Logistics, Gueydon, Ikea Distribution, Lidl, Morin Logistics, ND Logistics, Newlog, NYK, Rigard, Samse, Socara, Wincanton...

Computer system houses, software, IT engineering

Altran Technologies, Atos Origin, Capgemini, Corys Tess, Hardis, Logica, Mentor Graphics, Open, Silicomp, Sogreah, Sogeti, Thales Services...

Chemicals, plastics, pharmaceuticals, medical equipment

Adisseo, Air Liquide, ARaymond, Arkema, BD, bioMérieux, Bluestar Silicones, Condat, Covidien Manufacturing, Finorga, Patheon, Perstorp, Rexam, Roche Diagnostic, Tornier...

and international trade

Leading companies born in Grenoble-Isere

Airstar, Allibert, A Raymond, Arjomari (ArjoWiggins), Efcis (STMicroelectronics), Kis, Merlin Gerin (Schneider Electric), Pomagalski, Radiall, Rossignol, Sogeti (Capgemini), Sogreah, Soitec, Teisseire, Vicat, etc.

Private research

Ahlstrom Paper Group, Air Liquide, Alcan EP, ArjoWiggins, BD, bioMerieux, Bull, Caterpillar, IBM, Lafarge, Orange Labs, Schneider Electric, Soitec, STMicroelectronics, Sun Microsystems, Vicat, Xerox (XRCE)...

Foreign investments

708 companies with foreign-owned capital employ more than 45,300 people; 24% are US-owned.

(Estim. AEPI 2011)

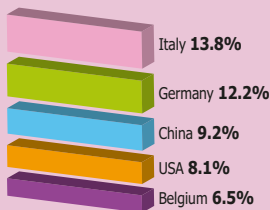
International trade (€bn)

Export 9.25

Import 8.04

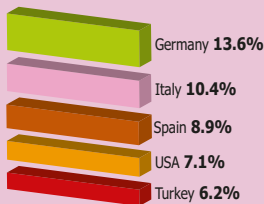
Second largest exporter in the Rhone-Alpes region, Grenoble-Isere represents 19.9% of its imports and 21.7% of its exports.

Main countries selling to Grenoble-Isere



As a percentage of total imports

Main countries buying from Grenoble-Isere



As a percentage of total exports (DRD 2010)

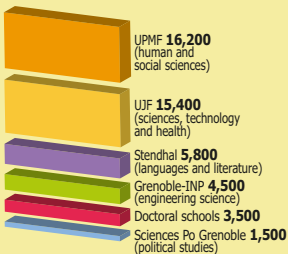
Higher education and research

Higher education

64,700 students

1 of 5 Grenoble's inhabitant is a student

- **University:** 46,900 students



Grenoble Ecole de Management ⁽¹⁾ 6,400

Paramedical & social schools 4,200

Technician certificates ⁽²⁾ 3,800

Preparatory classes 1,500

National School of Architecture 950

Other schools 800

School of Arts 125

(1) Of which 4,000 on site
(2) Public and private

- **Grenoble-INP**
22 engineering degree courses at six schools
- **UJF/Polytech**
7 engineering courses
- **23 international master's degrees Grenoble-INP/UJF**

- **13 doctoral schools** with a total of 3,500 doing theses, 45% of whom are foreign students
- **113 affiliated university** research laboratories
- **1 UNESCO chair** in Communications at Stendhal University – the only one in France

Innovation and technology transfer

- Grenoble, number one for cooperation between public and private research
- French patent applications by inventor

France 14,500

Rhone-Alpes 2,000

Iserre 810

(Inpi 2010)

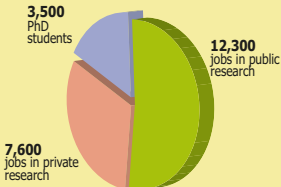
- Oseo allocated almost €34m in grants to 150 projects for innovative enterprise in Grenoble-Iserre in 2010
- **Business incubators**
 - GRAIN, ranking second in France
 - 202 projects, 131 companies created representing a total budget of €100m and more than 850 jobs
 - Petale
- **Seed funds:** Emertec
- **Venture capital**
 - Grenoble Angles ranked best business angel network in 2009 and 2011
 - 70 companies representing 1,500 jobs were funded



Research

Grenoble, leading centre for public research in France after the Paris area

• 23,400 total jobs



• **3 winners of the Nobel prize for physics:** Rudolf Mossbauer (1961), Louis Neel (1970), Klaus Von Klitzing (1985)

• **Wolf prize for physics:** Philippe Nozieres (1985)

• **Turing Award:** Joseph Sifakis (2007)

• **1 Nobel Prize in Chemistry:** Ada Yonath and Venkatraman Ramakrishnan (2009)

• **1 Blue Planet Prize:** Claude Lorius (2008)

• **4 international research institutes,** including the European Photon & Neutron Science Campus facilities:

- **EMBL**, European Molecular Biology Laboratory
- **ESRF**, European Synchrotron Radiation Facility
- **ILL**, Institut Laue-Langevin and
- **IRAM**, international research institute for radio astronomy

• 3 industrial technology centres

- **CETIM**, Regional Delegation of the Mechanical Industries Technology Centre
- **CSTB**, Construction Science and Technology Centre
- **CTP**, Paper Technology Centre

• 9 national research organizations

- **CEA**, Atomic Energy Commission
- **CEN**, Snow Study Centre
- **CNRS**, National Centre for Scientific Research
- **CRSSA**, Research Centre of the Army Health Services
- **INRA**, National Institute for Research in Agronomy
- **INRIA**, National Institute for Research in Computer Science and Automation
- **INSERM**, National Institute for Health and Medical Research
- **IRD**, Institut de Recherche pour le Developpement
- **IRSTEA**, National Research Institute for Environmental and Agricultural Sciences and Technologies



• "Invest in the future"

French government's economic stimulus package

- €387m
- 9 Equipex
- 8 Labex
- 4 Health and Biology Infrastructures
- 2 Nanobiotechnology Projects
- 1 Technology Research Institute: NanoElec

Made in Grenoble-Isère

Airstar

Inventor & world leader
manufacturer of lighting balloons.



Manufacturer of aluminum bottles.



Cable transport in New York and all
over the world: Brazil, Egypt, China,
Russia...

Manufacturer of the High Roller
cabins, the world's highest Giant
wheel in Las Vegas.



THALES

Over half of all X-ray examinations
performed around the world are
carried out using detectors designed
and manufactured by Thales Electron
Devices in Grenoble-Isère



World's most-powerful broadband
Set-Top Box System-on-Chip,
which will enable tomorrow's
fully-connected home.



SOI material is at the heart of
the Microsoft's Xbox 360, Sony's
Playstation and
Nintendo's Wii.

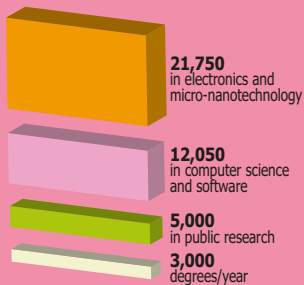


International centres of excellence

Information and communications technology

Grenoble-Isere has the technological, industrial and scientific resources to rise to the challenge of nanotechnology, while merging hard and software.

■ **39,000 jobs** of which



World class competitiveness centres, total public funding*



Nano 2012

Cooperation agreement between STMicroelectronics, IBM, le CEA-Leti, Mentor Graphics, ST Ericsson, and ASML. R&D investments of €2.3 billion and capital expenditures of \$1.25 billion.

Minalogic is a world-class competitive cluster specializing in smart miniaturized solutions; counts 204 members, 82% of which are SMEs. Since 2005, 185 projects have been certified representing a total budget of €1.7 billion (with €575m in secured public funding).

Minatec, a CEA-Leti and INP-Grenoble initiative, consists of 100,000 sq m campus with training, technology transfer and research platforms and the Maison Minatec.

In all it comprises 4,000 people. More than 40,000 visitors come to visit every year.

Pilsi: International centre for innovation in software and smart systems.

Grenoble-Dresden:

A partnership between two nanoelectronics clusters designed to pool resources and boost competitiveness.

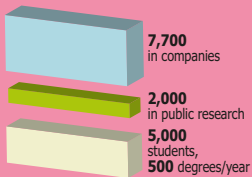
* since their inception.
(Figures 2011)



■ **Biotechnology**

The complementary scientific and industrial assets spread between Grenoble and Lyon make the region one of Europe's top five sites for biotechnology.

■ **10,000 jobs** including



Close-up on biotechnology

NanoBio: a nanobiotechnology innovation centre involving CEA and UJF

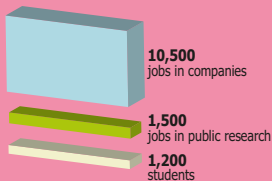
PSB: Partnership for Structural Biology with ESRF, ILL, EMBL, IBS and UJF

Clinatec: biomedical research centre for nanomedicine

LyonBiopole: a world-class competitiveness cluster specializing in vaccines and diagnosis

■ **New Energy Technologies**

Grenoble-Isere, with its remarkable scientific and industrial past, has several key assets – from hydroelectric to nuclear power, through photovoltaics – for developing new sources of energy.



Four major topics:

- photovoltaics
- hydrogen and fuel cells
- micro-energy sources for mobile devices
- smart grids

Close-up on new energy technologies

Tenerrdis, national competitiveness cluster for new energy

France's Solar Energy Institute (Ines): research, training and demonstration platforms involving CEA, CNRS, CSTB and other organizations

PV Alliance, an organization involving EDF EnR, Photowatt and CEA for the development of the photovoltaic sector

Development areas

Grenoble urban area

The Grenoble area is a major centre of technology, with a range of products suited to its economic specialization:

- science and technology parks such as Inovallee, Polytec and Biopolis;
- business centres for service activities;
- estates for industry and logistics on the outskirts of the urban area.

Nord-Isere and Rhone valley

Here are a wide range of plots and buildings, close to the motorway connecting northern and southern Europe, and beside the Lyon to Turin motorway. This location is particularly suitable for industry and logistics services, close to the Rhone river and Lyon Saint-Exupery airport.

Centre-Isere

Vast expanses of industrial land are available in a protected environment, near Grenoble airport and beside the Grenoble to Valence motorway.

Sud-Isere and uplands

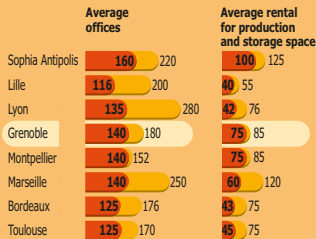
Thirty minutes out of Grenoble, fully equipped buildings and land served by main roads, in the midst of an exceptional natural setting.

Available land and business premises

- 993 hectares of developed land.
- 169,780 sq m office space.
- 906,250 sq m industrial premises (with logistics activities).

(Source: AEPI 12.14.2011)

Price of business premises (new or redevelopped space)



Before tax and charges per sq m per yr
(Survey May 2011 CBRE, AEPI)

Grenoble office rental costs range from €140 to €180 (plus tax and maintenance fees) per sq m per year. Industrial and warehouse space rental costs range from €75 to €85 (plus tax and maintenance fees) per sq m per year.

AEPI, Grenoble-Isere **economic development** **agency**

Funded by the Isere Departmental Council
and committed to serve the interests
of the community:

- Economic studies and information,
- Development of key technologies,
- Economic promotion of Grenoble-Isere,
- Prospection of companies in France and abroad,
- Reception and location of firms in Grenoble-Isere.



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