

THE CÔTE D'AZUR ECONOMIC PROMOTION AGENCY



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# ATTRACTING INVESTMENTS ON THE CÔTE D'AZUR 2018 REPORT

# What the **TEAM CÔTE D'AZUR** **REPRESENTATIVES** say



**Christian ESTROSI**

Mayor of Nice  
President of the Métropole  
Deputy President of the Provence-  
Alpes-Côte d'Azur Region



**Jean-Pierre SAVARINO**

President of the CCI Nice Côte d'Azur



**Renaud MUSELIER**

President of the South  
Provence-Alpes-Côte d'Azur Region  
Member of the European  
Parliament



**Jean LEONETTI**

President of the Communauté  
d'Agglomération de Sophia Antipolis  
President of the Syndicat Mixte  
Sophia Antipolis

## **A MAJOR ATTRACTIVENESS PLAYER**

The world has now entered a fourth industrial revolution – the digital technology and new information and communication technologies revolution. The prospects for this new economy are staggering. It is a new cycle of growth and innovation that is in all likelihood unique in history. Our Nice Côte d'Azur-Métropole is firmly positioned in this rising movement with the whole of the Côte d'Azur. Given the challenge of globalization, we are joining forces.

Team Côte d'Azur is one of the major players in this revolution. Whenever it successfully convinces a company – especially those with high potential for innovation – to set up in our area, it means growth and jobs for people living in the Alpes-Maritimes region. In this activity report, I am pleased to note that the attractiveness of the Côte d'Azur is increasing and drawing in more foreign-funded companies. This is particularly true in the very promising sectors – for example Smart Cities, Artificial Intelligence, Cyber Security, Environmental Technologies, and New Mobility.

## **WORKING TOGETHER TO MEET TOMORROW'S CHALLENGES**

Team Côte d'Azur recorded excellent results in 2018, with a significant proportion of foreign investment. I would like to pay particular tribute to the collaborative work carried out by the agency with the Communauté d'Agglomération de Sophia Antipolis and our Chamber of Commerce and Industry (CCI) in restructuring the Galderma site: the arrival of 6 health companies on the Bioparc proves that the availability of talent and suitable real estate are major factors contributing to the attractiveness of the territory.

Observing market trends is just as important: the Côte d'Azur welcomes new skills in the Automotive, Artificial Intelligence, and Cybersecurity sectors. In the coming years, our ability to analyse consumer markets will enable us to structure new key sectors on the Côte d'Azur. This is one of the bricks that the CCI Nice Côte d'Azur makes available to the territory so that the Côte d'Azur positions itself today on tomorrow's challenges.

## **AN EXCEPTIONAL TERRITORY WITH COMMITTED ACTORS**

We live in a region that is the envy of the world: changing landscapes between the sea and the mountains, a thousand-year-old culture and heritage, a unique lifestyle... These numerous assets make the South an exceptional region with many actors committed to further strengthen its attractiveness through their great promotional work – in the same way as Team Côte d'Azur.

I aim at turning the South of France into a region that influences and innovates, a region that continues to attract tourists from around the world. This is the ambition of the Growth Plan for the Tourism Economy that we have developed with all players in our territory. This roadmap has set our goal: to become a world-leading destination based on a 20-year vision and results in 3 years. I am proud of the progress we have already made with our partners and I know I can count on Team Côte d'Azur to turn our region into an even more attractive and competitive territory, with the values of a smart, efficient and innovative tourism economy.

## **50 YEARS OF ATTRACTIVENESS AND ECONOMIC GROWTH**

The fruit of joint work and human commitment between the teams of Sophia Antipolis and Team Côte d'Azur, 2018 marks the beginning of the celebration of the 50th anniversary of Sophia Antipolis, the leading technopole in Europe, and a record year in relation to the last decade in terms of the number of foreign companies deciding to move to Sophia Antipolis, the number of jobs maintained and created, and real estate figures, with over 45,000 sqm marketed thanks to launching numerous high quality new and rehabilitated tertiary programs on the technopole, and future major tertiary projects meeting businesses' expectations.

In addition, the technopole is involved in the entire Sophia Antipolis and Côte d'Azur ecosystem, first and foremost with academic partners (UCA, INRIA, CNRS, etc.) in particular with Artificial Intelligence since the territory was shortlisted to host an Interdisciplinary Institute for Artificial Intelligence ("3IA - Institut Interdisciplinaire d'Intelligence Artificielle"), which will strengthen the legitimacy of the technopole in terms of hosting new innovative companies and R&D laboratories working in the field. 2019 promises to be successful with the strategic positioning of Sophia Antipolis both nationally and internationally, an appetite for investors to build the next 50 years of the technopole, and the human talent that is always Sophia Antipolis' most important asset.

# EDITORIALS



**Philippe PRADAL**

President of Team Côte d'Azur



## Attracting talent from France, Europe and all over the world...

If there is one universe that now knows no borders, it is the economy. A globalized economy, enriched by instant information and facing merciless competition between businesses but also between universities and schools, countries and territories. In this global battle, our territory has an ambassador, Team Côte d'Azur, and exceptional advantages that have been shaped both by nature and by the people of the Côte d'Azur:

Remarkable accessibility, in particular thanks to the second largest airport in France;

A diversity of landscapes associated with a cultural offer worthy of the largest capitals;

And two driving players, the Nice Côte d'Azur-Métropole, which supports a promising National Interest Operation served by a multimodal hub

that would make the whole world jealous, and the Sophia Antipolis agglomeration, which has been hosting the leading technopole in Europe for the past fifty years.

Artificial intelligence, life sciences - human as well as environmental - and new technologies in all their diversity... Nothing that is looking forward to the future is foreign to a territory that is said to be blessed by the gods. Year after year, Team Côte d'Azur pursues its mission to attract every kind of talent from France, Europe and all around the world.



**Philippe SERVETTI**

CEO Team Côte d'Azur

## Supporting a dynamic and international climate of investments

With 37 companies deciding to settle in the area and 746 jobs created or maintained at the 3-year point, the agency shared really positive results in 2018. This proves the economic attractiveness of the Côte d'Azur and the attractiveness of its leading sectors, particularly for European, British and American investors.

With over 60% of international investment decisions in 2018 and a record number of companies setting up in the area thanks to the agency, Team Côte d'Azur is reaffirming its key role and expertise in promoting business activities in the Côte d'Azur by fully subscribing to the territorial marketing approach supported by its representatives.

2018 also marks a strategic milestone for Team Côte d'Azur, which is set to refocus its roadmap on international prospecting in order to attract foreign investors and strengthen the local economic structure.

True to its "acting together" purpose, Team Côte d'Azur has played a driving and unifying role by setting up and leading commercial prospecting and joint visibility actions during more than 70 congresses and events in 2018. The agency has also proved its important structural role at a local scale, especially by assisting Galderma in the redevelopment of its location site in Sophia Antipolis, and by coordinating a dynamic community in the Automotive field. Today, this community is led by the "Initiative Smart Vehicle Côte d'Azur" and co-led by Team Côte d'Azur.

Those numerous levers collectively contribute to promoting the Côte d'Azur as a dynamic business destination that attracted leading companies such as Mercedes, Nuvisan, Syneos, Kléaria and many others in 2018.



# 2018 REPORT ON SET-UPS

## ► ANALYSIS & MAJOR TRENDS

In 2018, Team Côte d'Azur supported 37 decisions, mainly international ones, to invest in the Alpes-Maritimes, creating or maintaining 746 jobs at the 3-year point.



### GEOGRAPHICAL ORIGINS OF COMPANIES SETTING UP IN THE REGION

Among the decisions to invest that Team Côte d'Azur supported during 2018, foreign-funded companies predominated.

37 foreign-owned companies from 14 different countries set up in the region – with a slightly higher concentration from Northern Europe, the United Kingdom and the Americas. Although most investments originate from Western Europe (62%), France holds a large place with 13 newly established French companies, followed by Germany with 4 new local setups.

Of the 746 jobs at the 3-year point, 75% are generated / maintained by foreign companies. This sharp increase compared to 2017 depicts the sound work done in terms of short- and medium-term commercial prospecting in international markets.

We highlight the acceleration in the number of company moves directly or indirectly generated by Brexit, which seem to have grown in respect of projects that have entered the portfolio over the last 3 years, with 4 investment decisions from British companies in 2018.

The increased representation of companies from around Europe may reflect our strengthening position as a strategic anchor to cover the entire EMEA region from the Côte d'Azur, with nearly 50% of jobs generated by the European arrivals (excluding France) the agency supported in 2018.

In terms of national attractiveness, the set-up of French companies mainly result from the creation / expansion of commercial offices, covering the whole South of France region.

### FOREIGN COMPANIES WELCOMED IN THE ALPES-MARITIMES IN 2018

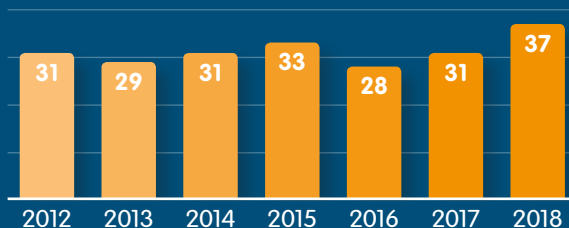
Of the 90 set-ups / expansions of foreign-funded companies (ECE) in the Alpes Maritimes in 2018, **24** were directly supported by the economic promotion agency Team Côte d'Azur, i.e. **65% of the total company creations / expansions** supported by the agency.

These foreign investments originating from **13 countries** created or safeguarded **563 jobs at the 3-year point**. Although the Service sectors account for most international investments in 2018, representing 46% of the ECEs for 25% of the resulting jobs, the Life Sciences industry is more strongly represented among foreign set-ups, with 275 jobs generated and maintained in the territory.

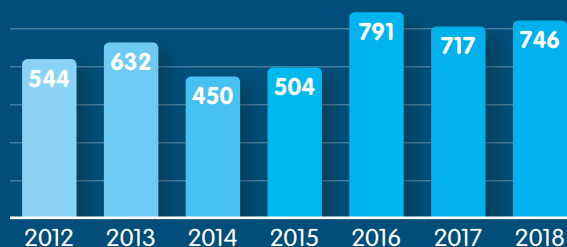
*\*CCI 2018 study - foreign-funded enterprises in the Alpes-Maritimes*

## ► KEY FIGURES

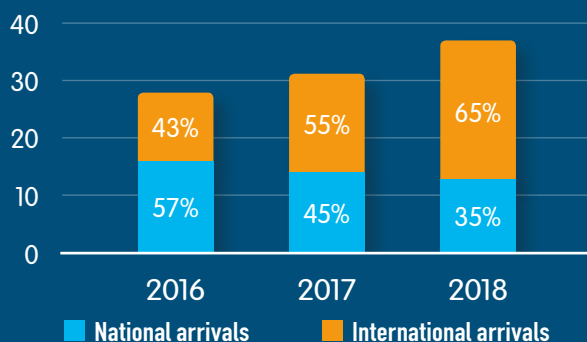
### RECORD OF SUPPORTED SET-UPS



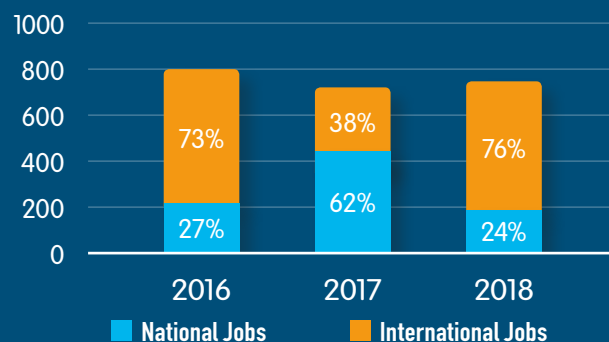
### RECORD OF GENERATED / MAINTAINED JOBS



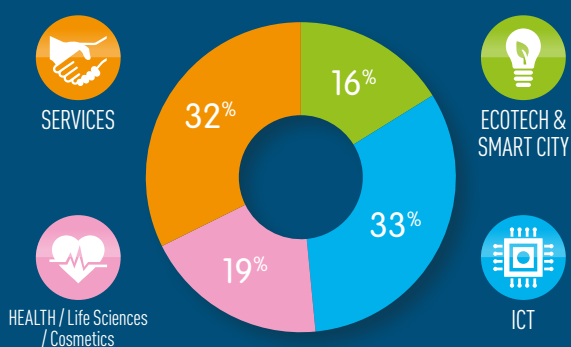
### DEVELOPMENT OF INTERNATIONAL SET-UPS OVER 3 YEARS



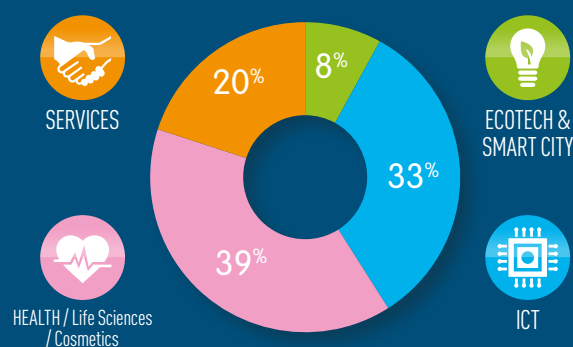
### EVOLUTION OF THE PROPORTION OF JOBS FROM INTERNATIONAL COMPANIES OVER 3 YEARS



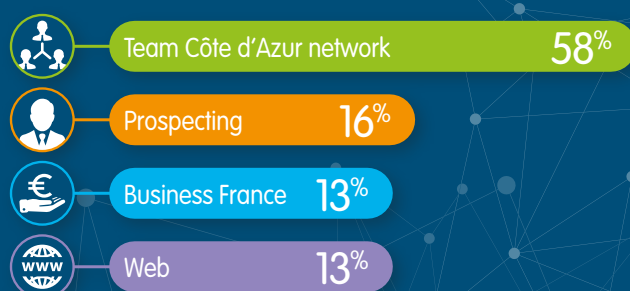
### DISTRIBUTION OF SET-UPS BY SECTOR



### DISTRIBUTION OF JOBS CREATED BY SECTOR



### SOURCE OF PROJECTS





### SET-UP LOCATIONS

#### Attracting investment:

Sophia Antipolis and the Nice Côte d'Azur-Métropole are in the lead

The choice of location breaks down between MNCA (24%), CASA (59%), CAPL (8%), CAPG (5%) and CARF. A strong sign of the attractiveness of the technopole, which maintains its growth as it reaches its 50th anniversary. The combination of the presence of talent and available and adapted commercial real estate are the foundations of Sophia Antipolis' competitiveness. Once again, Sophia Antipolis confirms its resilience through the restructuring of the former Galderma site and the set-up of CRO SINEOS (USA) and NUVISAN (Germany) on the Bioparc site.



### MARKETS AND SECTORS

The historical sectors of Information Technology and Services are diversifying; the Life Sciences sector is asserting itself

Although Services and ICTs are predominant, with more than 60% of set-ups in 2018, the sectoral distribution is more balanced. A growing number of health-oriented businesses have set up too, partly related to the redevelopment of the Galderma site.

The Health industry alone accounts for over 250 jobs created or maintained locally, especially in Sophia Antipolis thanks to the arrival of foreign stakeholders specializing in the Pharmaceutical and Biotechnology sectors (SINEOS, NUVISAN, MD INTERNATIONAL, etc.).

The ICT sector, historically strongly represented on the Côte d'Azur, includes 33% of arrivals supported by TCA for 35% of jobs maintained / created at the 3-year point.

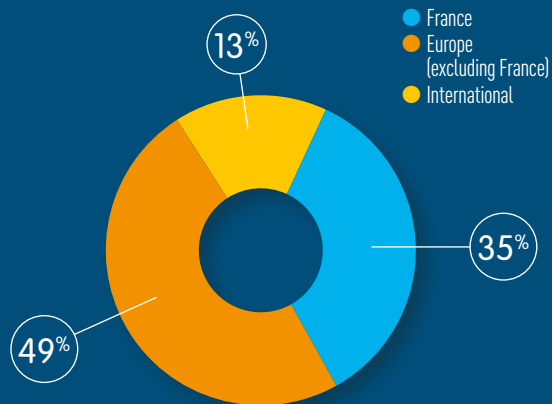
These results echo the development of emerging communities around the digital economy, such as the Automotive (Mercedes, Ferchau, Melexis), Cybersecurity (the Accenture global cybersecurity R&D centre), Fintech (KeyQwant) and Micropackaging (Lixens) sectors.

Those niche investments also reflect the over-specialization of companies. Focus is on promising technologies including Artificial Intelligence, Smart City and New Mobility Solutions for the coming 5-10 years.

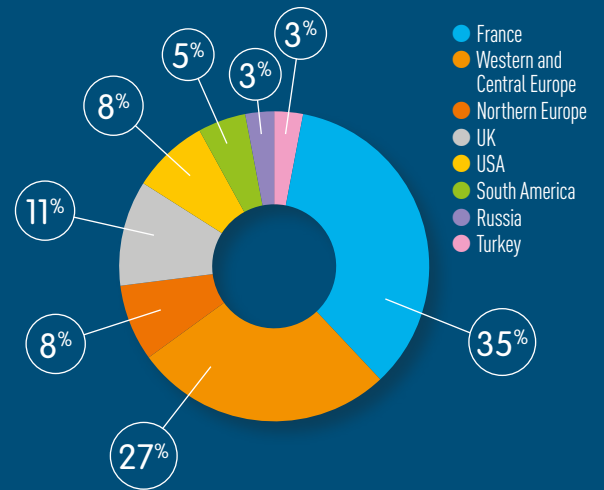
The ecotechnology area maintains its growth rate, with 6 newly established stakeholders in 2018, 2 of which innovating in maritime energies and liquids micro-analysis.

# ► KEY FIGURES

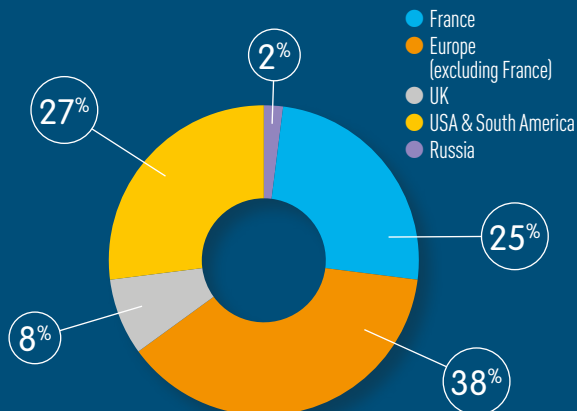
## GLOBAL GEOGRAPHICAL ORIGIN OF SET-UPS



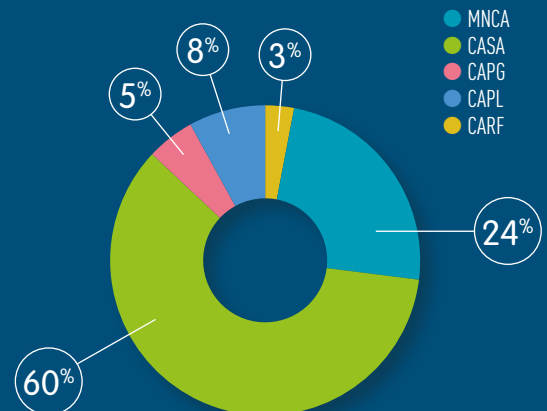
## DETAILED GEOGRAPHICAL ORIGIN OF SET-UPS



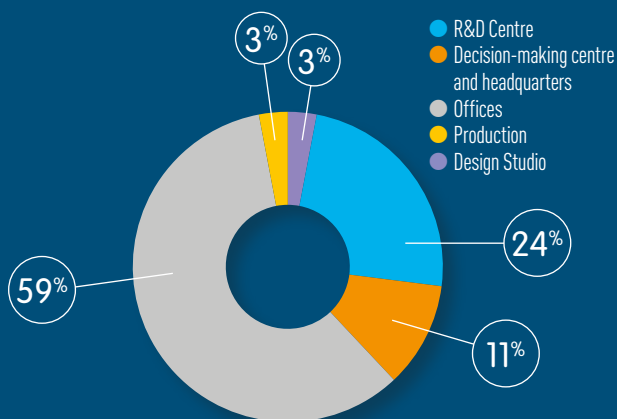
## GEOGRAPHICAL ORIGIN OF JOBS CREATED



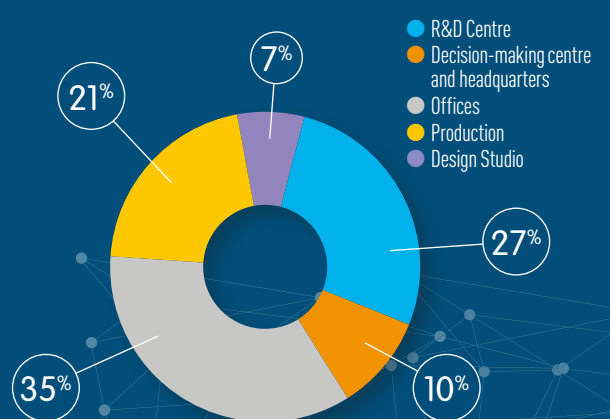
## LOCATION IN THE ALPES-MARITIMES



## TYPE OF ACTIVITY



## TYPE OF ACTIVITY IN RELATION TO JOBS CREATED





# THEY CHOSE THE CÔTE D'AZUR IN 2018

## ► TESTIMONIES



### SMART CITY / FLUICITY (Nice Côte d'Azur)

Digital citizen consultation and participation platform

*"We decided to set up on the Côte d'Azur because in addition to tourism, the region has a very dynamic approach to technology. Team Côte d'Azur helped us meet decision-makers, told us about the assistance programs available, and gave us some useful advice to support our growth in human capital, the keystone of our success."*

**Martin PELISSARD**, Commercial Director



### ECOTECHNOLOGY / KLEARIA (Sophia Antipolis)

Company specializing in the development of water micropollutant analysis technologies

*"The Côte d'Azur offers a favourable ecosystem for CleanTech companies with the development of Nice Eco Vallée, the presence of key accounts and the numerous research centres. Team Côte d'Azur has been an essential partner throughout the process of setting up here. The team told us about the most strategic funding assistance to drive our project forward and also helped us making local contacts."*

**Clément NANTEUIL**, CEO



### PHARMACEUTICAL INDUSTRY / NUVISAN (Sophia Antipolis)

Service company specializing in drug development for the Life Sciences industry

*"The German group NUVISAN, which signed an agreement in 2018 with NESTLÉ SKIN HEALTH to take over some of the R&D capacities of the Galderma centre in Sophia Antipolis, benefited from the support of Team Côte d'Azur and its partners throughout the takeover process. With a fully integrated R&D offering ranging from non-clinical studies to clinical studies adapted to the development of drugs, medical devices and cosmetics, NUVISAN will contribute to the growth of the Life Sciences industry in Sophia Antipolis alongside the other actors in the Bioparc."*

**Pierre DIEBOLT**, Managing Director



### BIOTECHNOLOGY / PHENOCELL (Grasse)

R&D centre dedicated to the production of cells and active ingredient testing services for the Pharmaceutical and Dermo-cosmetic industry

*"We chose the Côte d'Azur for its rich ecosystem in our key sectors of ophthalmology and dermo-cosmetics. The opening of the new Grasse BIOTECH business centre has enabled us to roll out our project in premises that have been specially designed for our business. Since the beginning of our plan to move into the Provence-Alpes-Côte d'Azur area, Team Côte d'Azur has been at our side in the search for premises, and then put us in touch with local partners to create our network of contacts and facilitate our move into the local ecosystem. The support of Team Côte d'Azur is precious: it complements the other mechanisms by listening and its more personalized actions."*

**Brigitte OTENIENTE**, CEO



### T I C / ZENDOC (Sophia Antipolis)

American IT company publishing contract tracking software combining the Cloud, AI and machine learning

*"The Côte d'Azur, and Sophia Antipolis in particular, has a very dynamic new technologies sector: the presence of large groups, IT companies, startups and major IT and business schools creates an ideal pool of talent for recruitment. Team Côte d'Azur has played a key role in providing us with an extensive network of partner companies, research laboratories and schools in the region."*

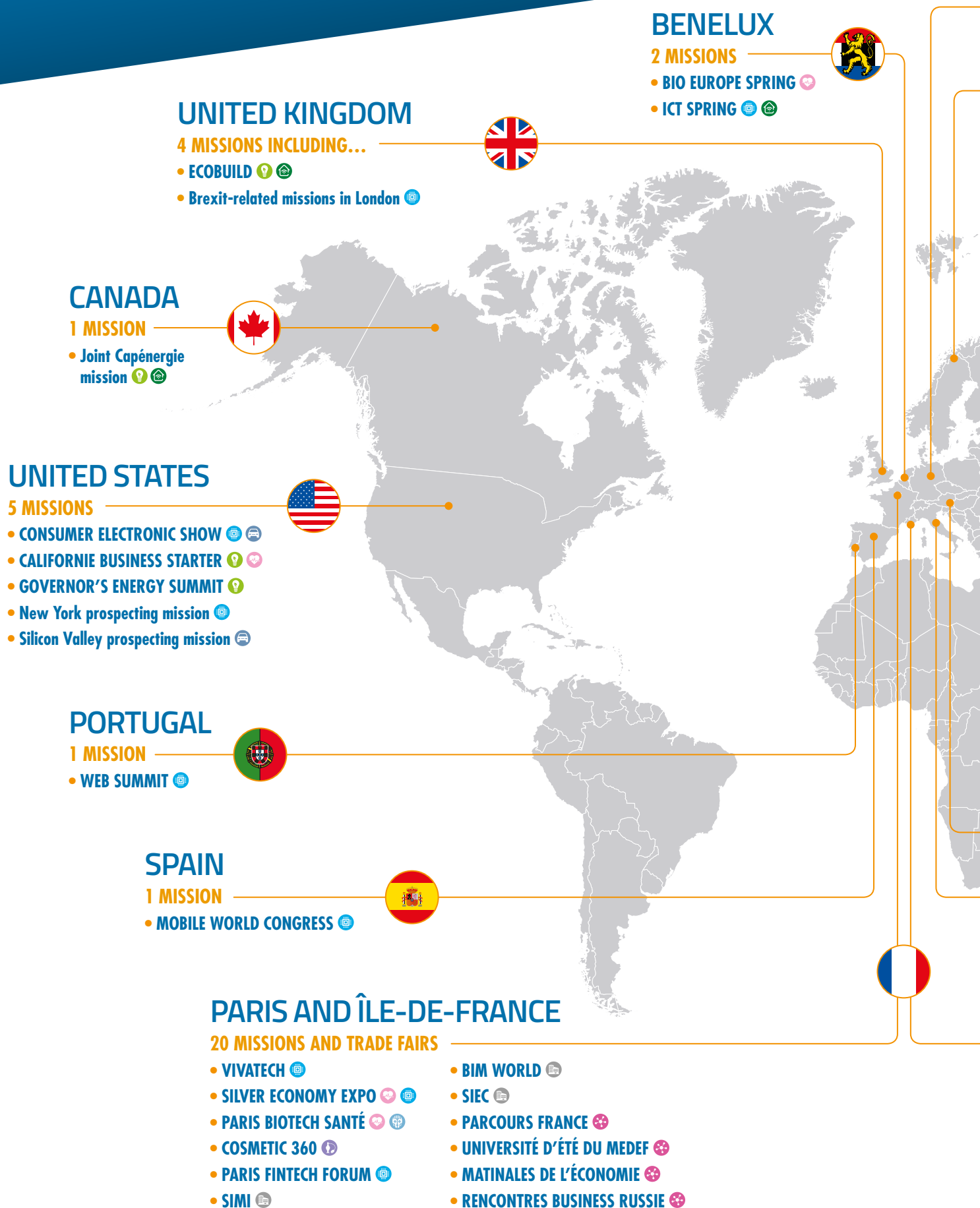
**Olivier COLLE**, Co-founder



| COMPANY NAME             | TYPE   | BRANCH OF ACTIVITY   | CAPITAL   |
|--------------------------|--|--|-----------|
| ACCENTURE CYBERSÉCURITÉ  | Decision-making centre                           | Global cybersecurity centre  | France    |
| ACIAL                    | Office   | IT service company   | France    |
| ALSCIENT                 | Office   | IT service company   | UK        |
| AMARIS                   | R&D Centre                                       | International technology and management consulting group   | Swiss     |
| AZUR CLASSIC CAR RENTAL  | Office   | Short-term vehicle rental company  | Hungary   |
| BAY MEDIA                | Office   | Advertising company  | UK        |
| BIOVOTEC                 | R&D Centre + Commercial Office                   | Company specializing in medical devices for skin healing   | Norway    |
| BOGALI CONCEPT           | Office   | Media agency specializing in audiovisual production  | Romania   |
| DETOUR TV                | Office   | Audiovisual content production company   | Brazil    |
| EASY JET                 | Office   | Airline company  | UK        |
| FERCHAU ENGINEERING      | Technical office                                 | Aeronautical engineering services company  | Germany   |
| FLASH LINE MAINTENANCE   | Office   | Company specializing in the repair and maintenance of aircraft and spacecraft  | Italy     |
| FLUICITY                 | Office   | Citizen participation application  | France    |
| GT SERVICE               | Office   | Motor vehicle maintenance and repair company   | Lithuania |
| GUEST READY              | Office   | Rental management company  | Swiss     |
| HOSTMAKER                | Office   | Rental management company  | UK        |
| INALPI                   | Decision-making centre                           | Dairy produce wholesaler   | Italy     |
| KEYQUANT                 | R&D Centre                                       | Fintech management company   | France    |
| KLEARIA                  | Decision-making centre / R&D Centre / Production | Lab-on-chips development company for real-time micropollutant analysis and water treatment optimization                | France    |
| KOSMOSCIENCE             | Office   | Laboratory specializing in cosmetics and pharmaceutical markets  | Brazil    |
| LINXENS                  | R&D Centre                                       | Design and manufacturing company for micro-connectors and inlays and RFID antennae                                     | France    |
| MC MA SOLUTIONS          | Bureau   | Company specializing in the definition and the implementation of integrated cost and energy demand reduction solutions | France    |
| MD INTERNATIONAL         | R&D Centre                                       | Company specializing in remote medicine  | Sweden    |
| MELEXIS GMBH             | Office   | Semiconductor supplier mainly for the automotive, industrial and medical sectors                                       | Germany   |
| MERCEDES                 | Design Studio                                    | Automobile manufacturer and equipment supplier   | Germany   |
| NUVISAN                  | R&D Centre                                       | Pharmaceutical research laboratory   | Germany   |
| PHENOCELL                | R&D Centre                                       | Biotechnology company that develops stem cells   | France    |
| POSTPROCESS TECHNOLOGIES | Office   | Provider of automated post-processing solutions for additive manufacturing   | USA       |
| PROSET                   | Office   | Event agency   | Turkey    |
| PROVIDENCE EQUITY        | Office   | Investment fund specializing in media, telecommunications and education  | France    |
| PROXIMUS                 | Office   | Software publishers and computer services company  | France    |
| R2M SOLUTION             | Decision-making centre                           | Innovation consulting firm specializing in sustainable development and energy efficiency                               | Italy     |
| SINAY                    | Office   | Company specializing in digital technology applied to the maritime industry  | France    |
| SWEETHOME                | Decision-making centre                           | Interior design application  | Russia    |
| SYNEOS                   | Production centre                                | Pharmaceutical research laboratory   | USA       |
| YUKIN THERAPEUTICS       | R&D Centre                                       | Biotechnology company specializing in immunotherapy  | France    |
| ZEN DOC                  | Office   | Project management company and information system maintenance  | USA       |

# TEAM CÔTE D'AZUR IN ACTION

## ► MAP OF THE 2018 HIGHLIGHTS



## KEY FIGURES

- **26** INTERNATIONAL PROSPECTING MISSIONS
- **OVER 40** ACTIONS AT NATIONAL LEVEL

### TARGET SECTORS:

- Information Technology / ICT
- EcoTechnologies
- Smart City
- Mobility / Automotive
- Artificial Intelligence
- Life Sciences
- Cosmetics
- Real Estate

## GERMANY

### 6 MISSIONS

- **E WORLD ENERGY & WATER**
- **ELECT !**
- **ELECTRONICA**
- **LIGHT + BUILDING**
- **MEDICA**
- **EXPOREAL**

## NORDIC COUNTRIES

### 3 MISSIONS

- **ITS WORLD CONGRESS** (Denmark)
- **NORDIC EDGE EXPO** (Norway)
- **SLUSH** (Finland)

## JAPAN

### 2 MISSIONS

- **BIOJAPAN**
- Joint mission with the Région Sud

## ISRAEL

### 1 MISSION

- **DLD TEL AVIV INNOVATION FESTIVAL**

## AUSTRIA

### 1 MISSION

- **EUROPEAN UTILITY WEEK**

## ITALY

### 2 MISSIONS

- **COSMOPROF**
- **KEY ENERGY**

## CÔTE D'AZUR

### 17 LOCAL EVENTS INCLUDING...

- **CHALLENGE FOR A NICE LIFE** (Nice)
- **CONVENTION EIT HEALTH** (Nice)
- **DAY ONE** (Monaco)
- **DIGITAL TRANSFORMATION WORLD FORUM** (Nice)
- **DRIVING SIMULATION CONFERENCE** (Antibes)
- **E HEALTH WORLD** (Monaco)
- **INNOVATIVE CITY** (Nice)
- **IPEM** (Cannes)
- **MAPIC** (Cannes)
- **MATINALES DE L'ÉCONOMIE**
- **MIPIM** (Cannes)
- **SOPHIA SUMMIT** (Sophia Antipolis)
- **TRUSTECH** (Cannes)



# TEAM CÔTE D'AZUR IN ACTION

## ► ROUND-UP OF THE MAIN ACHIEVEMENTS IN 2018

In 2018, Team Côte d'Azur honed its strategy of prospecting and attracting international investment, key factors in the economic influence of the Côte d'Azur as a business destination. During 26 missions in Europe, North America and Asia, the agency went out to meet leading companies and startups with high potential to promote the advantages of the Côte d'Azur and the economic opportunities offered in France's leading Smart Region.

In line with its representatives' wishes, Team Côte d'Azur has refocused its investor outreach actions by focusing on the agency's primary business: prospecting based on fine targeting in terms of both the business sector and geographical area prioritizing joint exploratory activities alongside its partners.

As a result, the agency made a concerted effort on the targeted international geographical areas: North America (United States and Canada), Northern and Western Europe, the United Kingdom and Asia (Japan, Korea and China) have been the location of many successful missions and exhibitions. In 2018, the outreach work especially focused on very small innovative enterprises with high potential and very fast-growing SMEs positioned on the initial market but in their pre-internationalization phase.

In 2018, the agency set up a new, finer sectoral approach for each end-user market to come closer to the positioning of the companies it approaches, by addressing the segments with high technological added value in Artificial Intelligence or Connected Vehicles for instance.





## UNITED KINGDOM

### Continuing prospecting in the context of Brexit and attracting British investment



#### 2018 KEY FIGURES

- **4 missions in London** undertaken by Team Côte d'Azur in 2018
- **4 set-up / expansion decisions** with British capital in 2018
- **More than 10 "lead" projects** with UK-based companies in the portfolio

**In the wake of the exploratory phase initiated in 2017, Team Côte d'Azur rolled out targeted prospecting for companies based in the United Kingdom, and candidates for a European presence, including the United Kingdom, in 2018.**

In 2018, three joint missions with the Nice-Côte d'Azur-Métropole and Business France in London and Paris gave a better understanding of the Brexit-related uncertainties and opportunities within the economic community in Britain. The fifty or so appointments and interviews during these missions confirmed the strengths of the Côte d'Azur in regards to the two challenges faced by companies impacted by Brexit: attracting qualified candidates on one hand and continuing a smooth-running business relationship with their customers on the other hand.

The Côte d'Azur is a solid economic alternative with its pool of available talent, high retention rate and substantially competitive wage costs compared to London or the West Coast of the United States. In addition, the advantageous geographic position and the diversity of air routes offered

by the Nice Côte d'Azur airport platform present many advantages for foreign investors. In 2018, the agency counted four UK set-up or expansion decisions and generated more than ten "lead" projects from UK-based companies in its portfolio.

The results and analysis of these Brexit-focused prospecting missions in 2018 seem to show an appetite for the Côte d'Azur's Fintech segment, which is gaining momentum since Symphony - a unicorn startup - decided to set up its European R&D centre in Sophia Antipolis at the end of 2017. The extensive media coverage of the operation prompted many decision-makers from mature FinTech companies to consider the potential of the Côte d'Azur as a business destination.

## NORTH AMERICA

### Joint prospecting actions to favour investment from the United States and Canada

By leading a prospecting strategy in North America, Team Côte d'Azur combined prospecting and economic diplomacy in 2018 to consolidate links with this key geographical area - one of the leading international investors in the Côte d'Azur region. As the top foreign employer in the Alpes-Maritimes region, its leading export country, and the third largest foreign tourism clientele, the United States stands out as a leading economic partner, inseparable from the Team Côte d'Azur strategy of tapping into investment flows.



### 2018 KEY FIGURES

- **5 missions in the United States** conducted by Team Côte d'Azur in 2018: 4 in California and 1 on the East Coast
- **3 set-ups / expansions** in 2018 with North American capital, out of a total of 5 foreign-funded companies from across the Americas
- **More than 15 "lead" projects** from US and Canada based companies

### HOSTING THE AMERICAN BUSINESS WOMEN'S DELEGATION - THE GREATER HOUSTON WOMEN'S CHAMBER OF COMMERCE

Accompanied by Team Côte d'Azur, the 100% female "Greater Houston Women's Chamber of Commerce" delegation has the dual objective of creating links and business relationships with other business women in the Provence-Alpes-Côte d'Azur Region (heads or executives of companies, politicians, etc.) and of exploring the most dynamic economic sectors in the region through visits to incubators, such as Nice CEEI and Grasse Biotech, and meeting startups and companies from the Health, Biotechnology and Aroma industries.







## HEAD-HUNTING AND PROMOTING CÔTE D'AZUR TALENT AT CES 2018

Attending the CES alongside the French delegation, including companies from the South of France Region and 12 startups from the Côte d'Azur and Sophia Antipolis, Team Côte d'Azur pursued its mission of promoting the Côte d'Azur at the center of the world's leading new technology fair.

With over 30 meetings scheduled and high added-value investment projects identified, the results from the 2018 edition are very positive. While attending the CES, Team Côte d'Azur focused on making contacts and prospecting companies with investment projects in Europe, as well as on monitoring high potential companies with which the prospecting team has been in contact for some years.

A new approach to the market and uses is clearly perceptible at CES, revealing the innovations that are destined to transform our technological environment: in recent years for example there has been a rise in the number of innovations in relation to new mobility, especially in the sphere of autonomous cars.

In addition, among the meetings held there, the agency identified Asian, American and European manufacturers and equipment manufacturers whose development projects would benefit from the fertile ground of the Côte d'Azur, which is actively structuring its Automotive sector under the banner of the 'Smart Vehicle Côte d'Azur' initiative.

The CES also made it possible to make initial contacts with leaders of companies from the AI and Digital Health sectors.



## CREATION OF DIPLOMATIC AND-ECONOMIC RELATIONS WITH THE CITY OF LAS VEGAS

On the sidelines of the CES, Team Côte d'Azur initiated diplomatic and economic relations with the city of Las Vegas and the State of Nevada to co-build the foundations of a mutual program to accelerate startups with high growth potential from the Côte d'Azur and the West Coast of the United States.

The first challenge is capitalizing on the pool of startups in the public business incubator in Las Vegas in order to identify American companies positioned on cutting-edge technologies and encourage them to prepare for export and to create a base on the Côte d'Azur as part of a soft landing strategy in Europe. In the second phase, integrating growing Côte d'Azur companies into the same public business incubator in Las Vegas should enable them to access the necessary funding and new pilot projects in the city of Las Vegas, particularly in the fields of Cleantech and Connected Health.

### I STRENGTHENING RELATIONS WITH AMERICAN INVESTMENT FUNDS

2018 was marked by the creation and the strengthening of relationships with four investment funds firmly anchored in the American entrepreneurship landscape - including the accelerator Plug and Play Tech Center (Silicon Valley), 1776 Ventures, White Star Capital and Our Crowd (US investment fund).

This intensive approach to venture capitalists is underpinned by two major challenges: expanding the financial opportunities for promising Azurean startups in the fun-

draising phase and offering an international Azurean-based deal flow.

In the medium term, these collaborations also open up prospects such as locating one of these funds on the Côte d'Azur, bringing a pitch contest organized by one of these organizations to the territory and giving one of these funds the opportunity to become co-investor or co-manager of a Côte d'Azur accelerator site dedicated to innovative companies.



*Successful companies in the 2018 California Business Starter program*

### I CALIFORNIA BUSINESS STARTER 2018: PROMISING CÔTE D'AZUR STARTUPS IN THE BLUETECH AND CLEANTECH SECTORS CONNECTING WITH THE AMERICAN MARKET

Offered in the framework of a partnership between the Provence-Alpes Côte d'Azur Region and the San Diego Franco-American Chamber of Commerce, the California Business Starter acceleration program enables ten regional companies to benefit from customized support to facilitate access to the American market.

As a California Business Starter partner, Team Côte d'Azur supported the successful companies throughout the operation in 2018, especially during a business tour in California in November. Following this joint international action, commercial partnerships have been formed between the Côte d'Azur and American companies specializing in the BlueTech sector.





## CONSOLIDATED RELATIONS WITH CANADA ON GREEN ENERGY

In April 2018, the agency took part in a mission to Canada with an expert from the Capénergie competitiveness cluster. Focusing on Cleantech, the mission aimed at prospecting companies that could set up in the Region, especially in Nice Eco Vallée, which is a demonstrator and open-air laboratory in the fields of environmental technologies and the Smart City.

Beyond the meetings that marked the Canadian prospecting campaign, Team Côte d'Azur visited strategic sites dedicated to innovation and experimentation as applied to green technologies and the Smart City – for example the MaRS Cluster Advanced Energy Center in Toronto, the Communitech Data Hub, the Waterloo Accelerator Center, the “Centre National en Electrochimie et en Technologies Environnementales” (CNETE), and the Shawinigan DigiHub.

Prospecting missions in Canada, which is very engaged and innovative in relation to the Smart City, were the opportunity not only for Team Côte d'Azur to benchmark new market trends, identify talent and potential technological and academic partners, but also to promote the 2018 Innovative City event, an international exhibition dedicated to Smart Cities held every year in Nice, and the regional FlexGrid smartgrids project led by Capénergies.

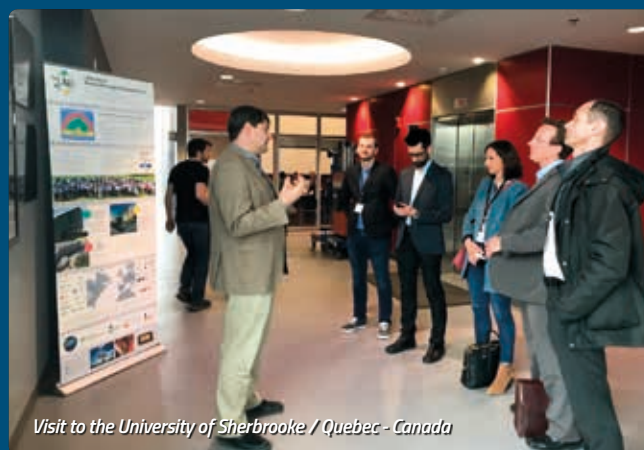
To further the exchanges and establish strategic partnerships, the agency received a delegation from Quebec during the Innovative City event in Nice, bringing together members of Shawinigan's DigiHub, a key player in the digital economy in Canada, with whom Team Côte d'Azur is building a lasting relationship based on clean energies. Team Côte d'Azur also coordinated a cross-border session for a Canadian delegation in Monaco alongside the Monaco Economic Board and the Nice Côte d'Azur-Métropole.



*Joint reception of a Canadian delegation in Monaco*



*Stéphane Pion, Head of the Quebec delegation invited to the Innovative City 2018 television studio*



*Visit to the University of Sherbrooke / Quebec - Canada*

## NORTHERN AND WESTERN EUROPE

The agency's action continued in the European zone in 2018, with the coverage of over 15 exhibitions focusing on prospecting for investors mainly in three of the Côte d'Azur's key business sectors: Ecotechnology & Smart City, Life Sciences and ICT. Prospecting favoured an even closer approach to automotive players in Germany and to companies specializing in connected health, Fintech, Cleantech and entertainment tech in Northern Europe.

### 2018 KEY FIGURES

- **16 exhibitions** across Europe, mostly dedicated to the sectors of Ecotech / Smart City, Health and IT
- **2 Trade / FDI missions** in Norway, Sweden and Finland oriented towards Cleantech
- **14 European-based companies** established in 2018 (excluding UK and France)

### GREATER PRESENCE AT THE MAJOR EUROPEAN ECOTECHNOLOGY EXHIBITIONS

The major European exhibitions dedicated to ecotechnology are a favourite hunting ground for potential investors in the Côte d'Azur. With this in mind, a Smart City promotion and prospecting mission was conducted in Norway and Sweden with Team Côte d'Azur's first time at Nordic Edge, an annual Smart City event, and a visit to Umeå's North Sweden Cleantech cluster accompanied by a French Tech Côte d'Azur expert.

A similar mission was conducted in Finland during the Slush Forum in Helsinki, an event linking tech startups and investors. A Cleantech targeted prospecting day also took place in the heart of the Vaasa Cleantech ecosystem in Finland.

Team Côte d'Azur also attended the European E-World Energy & Water Forum in Germany. This Forum is dedicated to innovative solutions for the future of energy supply. During the event, the agency showcased the advantages of the Côte d'Azur. It also attended the European Utility Week, Elect!, Key Energy, EcoBuild and Light Building - all leading European events punctuating the year for global ecotechnology players.



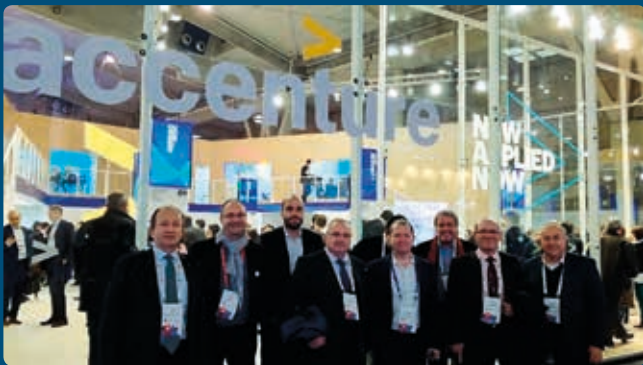
Presentation at E-World / Essen - Germany



## A EUROPEAN PROSPECTING STRATEGY EXTENDED TO HEALTH AND NEW TECHNOLOGIES

Increasingly linked together and crucial for both businesses and territories, the Health and New Technologies sectors are one of the pillars in the prospecting strategy. These two ecosystems are now considered as related and complementary in the light of the 3IA Côte d'Azur label, which places Digital Health at the heart of regional research and development programs.

The European prospecting strategy targeted towards the Digital sectors was fuelled by several campaigns including Electronica, the European Electronic Forum in Munich, ICT Spring, which gathers more than 500 key international IT and Fintech players in Luxembourg, and the Mobile World Congress, which took place in Barcelona and during which more than 50 sales leads were identified. The Fintech, Cybersecurity, Connectivity and Automotive industries are mainly targeted to complete the value chains which are required to strengthen the Azurean industrial and entrepreneurial base structured around AI, a technological convergence factor.



## MOBILE WORLD CONGRESS, AN EXCEPTIONAL HUNTING GROUND FOR TECH STARTUPS

During this key event, which brings together world mobile industry leaders every year and over 100,000 visitors, Team Côte d'Azur met companies specializing in IT, networks and mobile services. Alongside a delegation of eight companies from the South of France Region, accompanied by the SCS cluster, Team Côte d'Azur orchestrated a Tech Tour to guide representatives of the CCI Nice Côte d'Azur and the Métropole around the huge exhibition hall with over 2300 stands. Beyond the networking and technology watch undertaken during the show, the operation managed to identify more than fifteen prospects.



## ELECTRONICA / SEMICON EUROPE: PROSPECTING AT THE HEART OF EUROPE'S LEADING AUTOMOTIVE HUB

The Electronica / Semicon fair is probably to electronics what the Mobile World Congress is to the Mobile industry, with a great diversity of topics covered: dominated by microelectronics companies, the show today has a very high concentration of new entrants (or large restructured players) positioned in the growth markets of connected vehicles, e-health, industrial robotics etc.

Organized in Munich, Germany, and the leading European hub on the automotive market, Electronica has made strategic contacts with industry players and identified concrete levers to expand the portfolio of European prospects in the field of new mobility - for example by relying on the intervention of local experts, structuring collaborative pilot projects and creating partnerships with German clusters such as Baden Württemberg.

## FIRST SUCCESSFUL PARTICIPATION AT MEDICA, THE GLOBAL HEALTH FAIR

For the first time at the 2018 MEDICA fair, the CCI Nice Côte d'Azur and Team Côte d'Azur organized and co-hosted a "Health Côte d'Azur" pavilion to promote the excellence of the Health sector in the Côte d'Azur, represented by 8 innovative companies in the biotechnology field. An opportunity for these young companies to explore the potential of the European market and identify partners to accelerate the commercialization and industrialization of the solutions presented. Taking advantage of the excellent showcase offered by the stand, Team Côte d'Azur had over 20 meetings that led to identifying 7 projects in the field of connected health.



## PARIS AND ÎLE-DE-FRANCE

### An activation strategy for Paris-based influence networks

Team Côte d'Azur's prospecting and economic promotion activity is also deployed at a national level to attract endogenous talents and companies that appreciate the strategic advantages and quality of life offered by the Côte d'Azur. The national strategy focuses mainly on the Paris region and our Côte d'Azur region with actions associated with the "Côte d'Azur" market.



### 2018 KEY FIGURES

- **Nearly 20 trade fairs and events covered** in Île-de-France
- **2 key account tracking missions** in Paris
- **13 French companies established** in 2018

In 2018, prospecting campaigns were led during some 20 fairs in Paris offering major economic and institutional opportunities in all sectors.

This constant presence in the heart of the Paris market is linked to the agency's strategy of building bridges and sustaining links with the influence networks and decision-makers in the capital. Coupled with the usual activities, developing these networks, such as the Comité Richelieu and the EBG, makes it possible to win over potential national mobile businesses depending on the profiles and relocation plans of member companies in the Paris business networks.

The fastest-growing French companies presented by Deloitte each year in Paris (Technology Fast 50) are in the crosshairs of the agency's sights, favouring entities positioned in the Smart City, New Mobility and Life Science sectors as applied to the Silver Economy and Digital Health and the Entertainment Media.

A real showcase and springboard for the Côte d'Azur economy in the heart of the capital, the "Maison de la Métropole Nice Côte d'Azur" welcomes the "Matinales de l'économie" - themed round table discussions presided over by Virginie Atlan and co-organized by Team Côte d'Azur.



Among the outstanding actions in Paris in 2018, Team Côte d'Azur's first Viva- Tech, a fair dedicated to technological innovation and world-famous startups, along with a stand "Invest in Côte d'Azur" at the MEDEF summer school. In the field of health, the agency was present at Cosmetic 360, Paris Biotech Health and Silver Eco Expo.



## LOCAL ACTIONS ON THE CÔTE D'AZUR

### Attracting and maintaining local investment and talent

As attentive to attracting investments as to keeping them in the territory, Team Côte d'Azur conducts several actions locally: in addition to the prospecting strategy tied to local events and hosting international delegations, is the work assisting manufacturers facing sectoral issues that structure the territory with the support of local institutions.



### 2018 KEY FIGURES

- **12 local fairs and events covered** by enhanced prospecting and promotional activities
- **6 agreements and visibility partnerships** established with exhibitions held on the Côte d'Azur that address the target markets
- **5 relocated "Matinales de l'Economie"** co-organized by Team Côte d'Azur
- **7 foreign delegations hosted** and accompanied by the agency

Attractiveness is also an issue being developed throughout the Côte d'Azur. Team Côte d'Azur thus contributes to structuring high-performance ecosystems at local level in order to strengthen the competitiveness and attractiveness of value-added sectors that will then be promoted internationally.

In addition, activities at local events in 2018 intensified to take full advantage of the presence of captive investors and decision-makers from all over the world and from all sectors on our "home" territory during major Côte d'Azur professional events – for example MIPIM, Innovative City, Trustech, IPEM, DSC, etc.





## AUTOMOTIVE

STRUCTURING A COMPETITIVE CÔTE D'AZUR ECOSYSTEM AROUND NEW MOBILITIES,  
DRIVEN BY THE SMART VEHICLE CÔTE D'AZUR INITIATIVE



*Members of the Smart Vehicle Côte d'Azur initiative at the DSC Europe show in Antibes*

Thanks to the work of the consortium of Azurean actors involved in new mobilities and united under the "Smart Vehicle Côte d'Azur" initiative initiated by Team Côte d'Azur, 2018 marks a milestone in structuring the Automotive community.

**With more than 70 companies and institutions now working in the Automotive industry in our territory**, the Smart Vehicle Côte d'Azur initiative organizes business meetings that offer opportunities to newcomers, industry leaders, startups, academic and institutional actors to meet and join the value chain of this open community. Called "Get Togethers", these recurring meetings are based on a transversal and interactive format: four players from the wider Automotive sector pitch to the audience to present themselves and discuss what they can bring and what they expect from the Smart Vehicle Côte d'Azur community.

Lead on the "International promotion and positioning" project, **Team Côte d'Azur has mapped the connected vehicle community on the Côte d'Azur**, making it possible to visualize all the actors and stakeholders in the territory. In addition, a visibility campaign was orchestrated around the initiative with the co-creation of a visual identity, a press kit and various promotional materials.

**The 18th Driving Simulation Conference Europe**, an international event bringing together driving simulation specialists, was organized for the first time in Antibes in 2018. The visibility partnership established with Team Côte d'Azur enabled the deployment of an extensive promotional mechanism for the "Smart Vehicle Côte d'Azur" initiative, particularly with the creation of a dedicated stand and the organization of a keynote and networking cocktail event attended by close to 300 European and local new mobility specialists.

This effort to promote the local Automotive community was expanded internationally during the mission of Team Côte d'Azur in the United States. Pierre Sigrist, the Côte d'Azur connected vehicle expert and CEO of Epicnpoc, also joined. This mission was an excellent opportunity to prospect companies in this sector in the Silicon Valley - the US connected vehicle hub - and observe good practices and strategies that can be transposed across our territory to structure a complete value chain and trigger test projects around the mobilities of the future.





Launch of the Challenge for a Nice Life program in Nice



## LIFE SCIENCES

### A MAJOR ATTRACTIVENESS LEVER WITH THE EMERGENCE OF A EUROPEAN CITY OF HEALTH IN NICE AND THE CREATION OF THE BIOPARC IN SOPHIA ANTIPOLIS

Since the end of 2017 and throughout 2018, Team Côte d'Azur played **an active role in supporting Galderma's industrial transformation process** with the successful restructuring and rehabilitation of the site in Sophia Antipolis. Six buyers, including CRO Nuvisan and Syneos, are now sharing their skills within the site that has been converted into a Bioparc and solutions were offered to all employees. The result of a concerted effort, this industrial transformation reaffirms the importance of specific real estate aligned with the available high value - added talents - in this case in the very demanding and competitive Biotech field.

**The EIT Health business convention** (Institut Technologique Européen Santé) was held for the first time in Nice in 2018 thanks to the bid jointly prepared by the city of Nice, Team Côte d'Azur and its partners. The city of Nice is a network partner for the event, which focuses on open innovation allowing each of the innovative players to appropriate to the extent of their abilities cutting-edge topics such as Artificial Intelligence, Precision Medicine and Mobility related to managing health problems.

Parallel to this convention and partnered by the city of Nice, the launch of the **first edition of the Challenge for a Nice Life** took place in June. This challenge is a contest aiming at meeting the health issues of the South of France Region. Since health drives territorial economic development on the Côte d'Azur, the ecosystem (startups, SMEs, large groups, associations, etc.) is invited to offer solutions to the major strategic areas outlined by the Mayor of Nice and its teams on public health challenges such as aging, carers, housing, well-being, etc.

**Throughout 2018, Team Côte d'Azur, which partners with the Maison de la Métropole Nice Côte d'Azur**, took part in the organization of the 7 "Matinales Economiques" tying them into the main Côte d'Azur exhibitions. Exploring current issues and future themes for the Côte d'Azur, the 30th "Matinale Economique", held in Monaco, brought together nearly one hundred people around the theme of "Health & digital transformation, how to protect our citizens and our territories?", drawing the prospects for strategic cooperation between the Métropole and the principality of Monaco.



## ARTIFICIAL INTELLIGENCE

STRUCTURING AND UNIFYING ACTION AROUND THE CÔTE D'AZUR IA PLAYERS,  
DRIVEN BY THE 3IA CÔTE D'AZUR BID



On the eve of its fiftieth anniversary, **Sophia Antipolis organized and hosted the first edition of the Sophia Summit in 2018. This international summit dedicated to Artificial Intelligence** attracted over 1,300 people around a program of conferences exploring a range of AI applications.

In the wake of the Villani report and the Nice-Sophia Antipolis 3IA bid, the Summit was organized jointly by "Université Côte d'Azur", the Communauté d'Agglomération Sophia Antipolis and the Alpes-Maritimes Region, with the support of private and academic partners, specialists and local AI innovation catalysts: Accenture, Amadeus, Orange and SAP, ExpWay, Inria, Median Technologies, Sophia Club Enterprises, etc.

Team Côte d'Azur actively participated in developing and promoting this ambitious event, with extensive work on the event's visibility especially thanks to media relations.

The opening ceremony of the Sophia Summit 2018 offered an exceptional setting for **the official announcement of the shortlisting of the Côte d'Azur to host an**

**Interdisciplinary Institute for Artificial Intelligence ("Institut Interdisciplinaire d'Intelligence Artificielle" - 3IA)** in the fields of digital medicine, computational biology and smart territories. The fruit of an unprecedented consultation orchestrated by UCA, INRIA, CNRS and the local authorities, the 3IA Côte d'Azur bid qualified and honed the sector analysis work on artificial intelligence: recognized academic and private research, a training offer that continues to grow and an innovative and diversified economic ecosystem focusing on Nice and Sophia Antipolis.







*Innovative City 2018: delegations from Israel, Belgium and Ukraine*



## SMART CITY

### SHOWCASING THE PIONEERING IMAGE AND EXPANDING TECHNOLOGICAL PARTNERSHIPS WITH THE NICE CÔTE D'AZUR-MÉTROPOLE - A SMART CITY AND DEMONSTRATOR TERRITORY

**As part of Innovative City 2018, the key smart city event held annually in Nice,** Team Côte d'Azur plays a central role in organizing receptions and accompanying international delegations of institutional decision makers and representatives of innovative companies.

The agency welcomed a Quebec delegation of 27 people, a large Ukrainian delegation and representatives of the Belgian Tweed cluster. The meetings organized between members of the delegations and local decision-makers as well as the numerous qualified meetings in this fundamental sector brought three projects to move to the Côte d'Azur to fruition and also resulted in partnerships, such as the plan to sign an international bilateral cooperation agreement between CréaCannes and the Quebec accelerator DigiHub, which should take place in 2019.

**Alongside the Nice Côte d'Azur-Métropole, Team Côte d'Azur took part in welcoming a Chinese delegation under the European International Urban Cooperation (IUC) program.** Supported by the European Commission, the program brings together 60 partner cities, including the Nice-Métropole, and supports cooperation between European cities and cities on other continents in the fields of sustainable urban development connected to international and European agendas and goals: SDGs, Paris Climate Agreement, Global and European Urban Agendas.



The challenge is to co-define and evaluate collaboration projects in order to replicate the "Smart City" technologies developed in Nice in the Chinese cities of Haikou, Kunming, Liuzhou and Weinan by encouraging the development of cooperation on research sites via universities. The visit was punctuated by the presentation of state-of-the-art devices and infrastructures, such as IMREDD's Smart City Innovation Center (SCIC) and the Monitoring Urbain Environnemental project (MUE). In 2019, exchanges are expected to continue and expand with the arrival of a delegation of ten European cities and Chinese partners in the IUC program at the Innovative City exhibition.

## COMMERCIAL REAL ESTATE

Action to support and promote the Côte d'Azur real estate offer



### 2018 KEY FIGURES

- **5 exhibitions covered** (MIPIM, SIMI, MAPIC, SIEC), including 1 international (EXPOREAL)
- **2 annual meetings of the "Club de l'Immobilier 06"** organized by Team Côte d'Azur, with the production of the Côte d'Azur commercial real estate market report

Real estate is an integral part of Team Côte d'Azur's promotional activities and a major economic development lever.

Thanks to a close collaboration with the territory's public and private actors, the agency works on the basics to identify and offer promoters, investors and users solutions adapted to their needs and / or strategies. Through its promotional activities, Team Côte d'Azur contributes to the development of major real estate operations, acting as an interface for investors, marketers and companies wanting to move into the future premises.

Since 2015, Team Côte d'Azur manages the Côte d'Azur's commercial real estate club.

The club brings together public and private real estate stakeholders on the Côte d'Azur and aims at getting them to work together to promote the Côte d'Azur real estate offer to investors.

Team Côte d'Azur produces an annual commercial real estate barometer for the Côte d'Azur. It consolidates the key real estate market figures for offices and business premises on the Côte d'Azur and is an essential economic information tool that is acclaimed by industry players. In 2018, Team Côte d'Azur included retail in its annual report.





# A TEAM SERVING COMPANIES INVESTING ON THE CÔTE D'AZUR







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