

2019



LYON-FRANCE, DMKE PHOTOGRAPHERS

ONLY LYON 

INVEST IN LYON

GROW

ENSEMBLE!

#onlylyon

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FUTURE BOEHRINGER INGELHEIM SITE (JONAGE)
ERICK LELOUCHE, PRESIDENT OF FRANCE, VISITS THE
BUILDING SITE

BY BRICE ROBERT, PHOTOGRAPHER

INVEST IN
ONLY LYON 

UNE COLLABORATION LA FOLLE ENTREPRISE CO. ET P. CHA. DROITS RÉSERVÉS. TOUTE RÉPRODUCTION INTERDITE.

LYON'S INTERNATIONAL ECONOMIC DIMENSION

A LONG, RICH HISTORY...

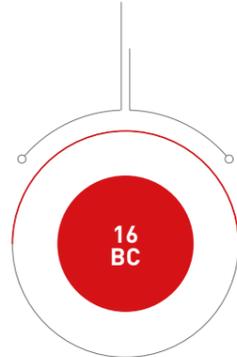


Lugdunum became the Capital of the 3 Gauls. At that time, it was a true Roman capital, the Empire's second main city after Rome.

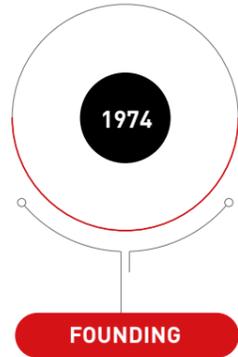
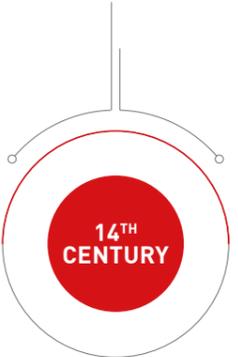
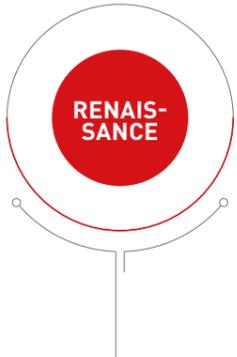


The invention of the 'Jacquard' weaving loom heralded **large-scale industrialisation** in silk weaving, bringing with it wide-ranging industrial creativity (in textiles, mechanical engineering, chemicals and later pharmaceuticals) that today continues to be internationally recognised sectors of excellence. A legend says that Napoleon 1st wanted to make Lyon the capital of his Empire...

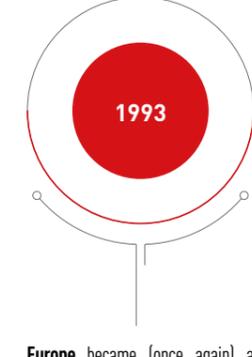
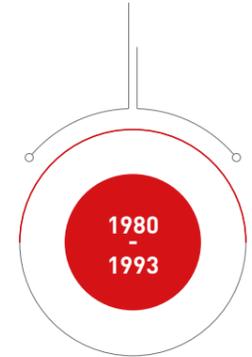
Lyon rises to the challenge of **international economic development**, and Aderly was France's first agency to open offices abroad, in Chicago in 1980, in New York in 1983, and in Tokyo in 1993.



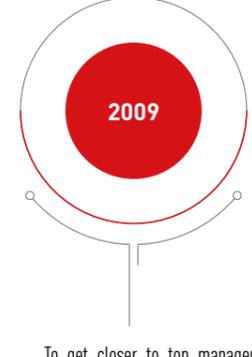
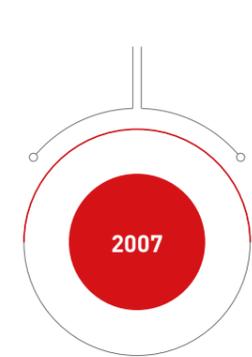
16 BC
Excellence in silk-working, expertise in printing and the advent of the **banking system** made Lyon a strategic crossroads for **international trade**. Lyon thus became France's 1st city to be granted the right to organise a "free-zone trade fair" by King Charles VII, drawing commerce from throughout Europe to the region.



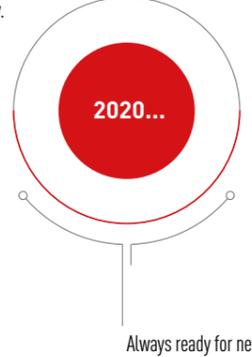
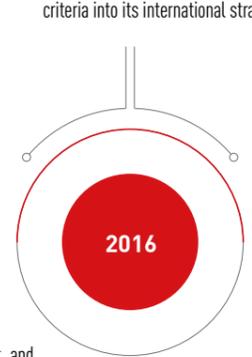
1974
FOUNDING
Creation of **Aderly**, with the mission to design and setup a promotion and attractiveness strategy, driving international and national investments into the Lyon area.



1993
Europe became (once again) a priority target for investments, leading to the opening of offices in Italy and Germany to promote Lyon.



2009
To get closer to top management and decision-makers at international firms, Lyon Metropole opened its Brussels offices to Aderly and to the ONLYLYON Tourism and Congress Bureau. The Agency also strengthened its London operations.



2020...
Always ready for new challenges!

CLOSER TO US...



In the last 45 years, globalisation has changed the world and the economy, with all of the impacts our societies have felt in recent months, compounded today by the Covid-19 crisis. Lyon has capitalised on this growing international development, as it did during the Renaissance with silk manufacturing and trade. At the heart of an attractive, vibrant ecosystem, **Aderly helps to coordinate, manage and promote the city's international development**, constantly updating its range of services and

commercial techniques in order to capitalise on Lyon's unique position on the world stage to attract companies to the region in the most sustainable way possible. Lyon's history has been shaped by flagship organisations such as Interpol, euronews, Hexcel, IFP Energies Nouvelles, Sanofi Genzyme, Boehringer Ingelheim and others that continue to be the driving forces of the region's economy.

IN 2019, ONLYLYON CONTINUED ITS AMBITION TO RAISE AWARENESS OF LYON AND ENHANCE ITS INTERNATIONAL ATTRACTIVENESS



- 351 items of press coverage, including 290 in foreign countries
- 2.65 million fans on social networks
- 26,542 Ambassadors, including 5,151 abroad
- 22 events around the globe
- 16.2 million people reached by offline communication campaigns worldwide



To promote the region with optimised resources, the foreign offices were closed. Nonetheless, partnerships were signed early on with other French organisations, such as Business France, which has a network of internationally based offices. By leveraging these business networks, as well as the ONLYLYON Ambassador network and the various resources already in place in target countries, the Agency and all of the players promoting the city around the world work every day to make Lyon and the region a go-to destination for international investors.



PART 1

PROMOTING INVESTMENTS IN THE SERVICE OF THE TERRITORY

**SURVEY ON PROMOTING INTERNATIONAL INVESTMENT IN LYON, FOCUS ON
INTERNATIONAL DEVELOPMENT... AS WELL AS ON VERY PROMISING FRENCH
PROJECTS!**

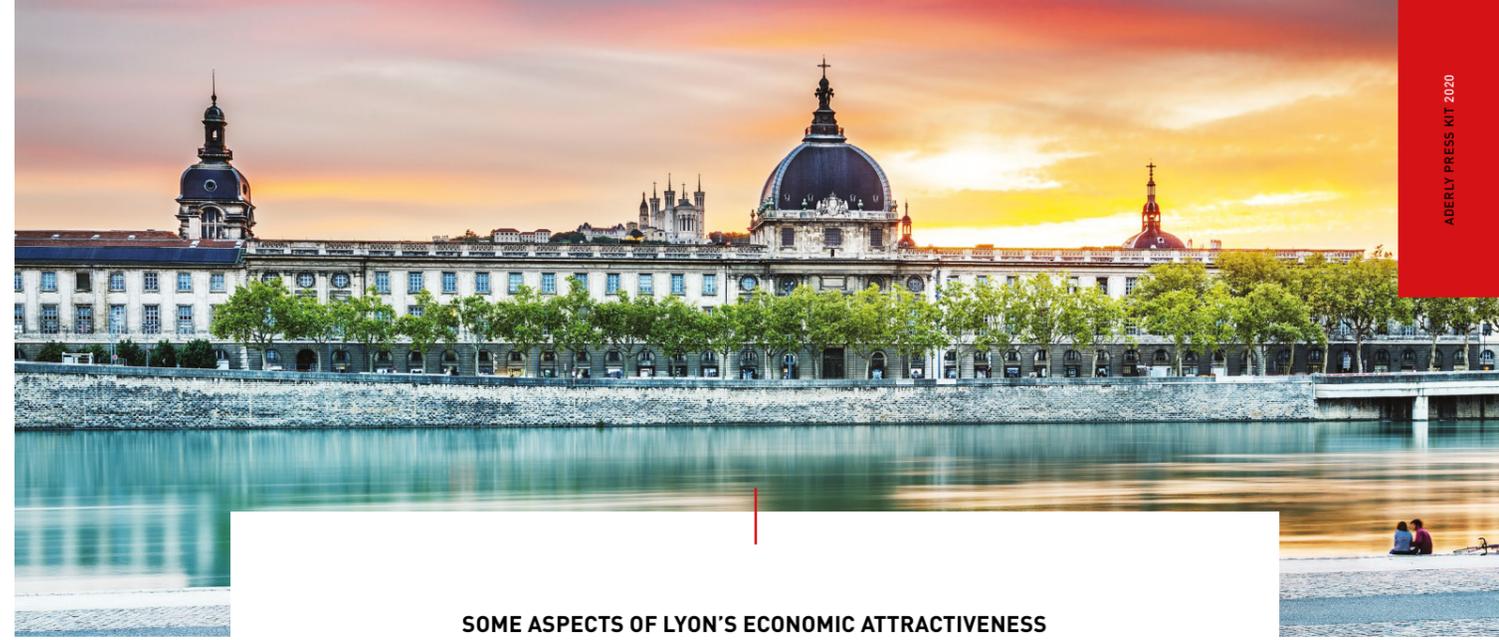
ARRIVAL OF MARITIME CONTAINERS
AT PORT FLUVIAL ÉDOUARD HERRIOT (LYON)

BY **ROBIN WEILL**, PHOTOGRAPHER

INVEST IN
ONLY LYON 

PHOTOGRAPHED BY ROBIN WEILL FOR INVEST IN LYON

SURVEY ON LYON'S INTERNATIONAL ATTRACTIVENESS



LYON'S ACTION IN A COMPLEX, FAST-CHANGING GLOBAL INVESTMENT ENVIRONMENT

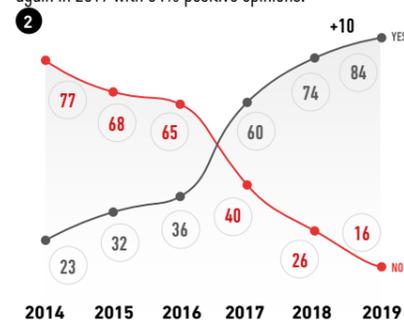
To promote Lyon's attractiveness in front of international investors, the dynamics of foreign investment must be analysed from global, national and local perspectives. This can prove challenging as they are impacted by divergent and contradictory indicators, even more so with the current global socioeconomic and health crisis related to the Covid-19 pandemic.

The global level of foreign direct investments (FDI) fell sharply in 2018 (-13%), the worst year since 2008, due to the repatriation of American investments to the United States, as well as to increasing uncertainty around the globe (the China / United States trade war; tensions between India and Pakistan, as well as North and South Korea; and ultra-liberal policies in Brazil) and in Europe, with Brexit, protectionist positions (Hungary) and political instability (Italy), potentially exacerbated by the health crisis in early 2020.

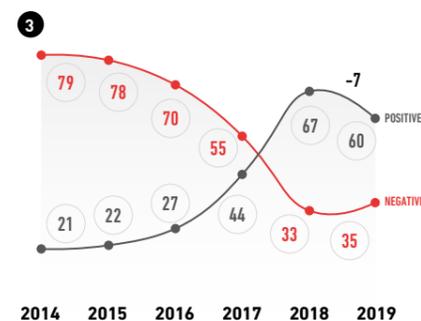
Yet, Aderly has also observed 7% growth in "greenfield" FDI, though this is slowing down (source: UNCTAD), as indicated by IMF or OECD forecasts that do not predict a return to sustainable growth in the short term, not to mention the forthcoming, as yet undetermined impacts of the current crisis. New players are entering the FDI arena, coupled with notable changes the nature of investments.

In this context, Europe appears both as aging and weakened by Brexit, yet also stands out as the only area of stability and trustworthy. The region remains number 1 recipient and number 1 creator of FDI (in number)... with a trio – the United Kingdom, France and Germany – leading the pack.

In its annual survey published in late 2019, IPSOS assessed the image that France reflects to decision-makers in international groups. This study shows that France's attractiveness has grown steadily since 2014, rising once again in 2019 with 84% positive opinions.



Though this positive image still remains to be confirmed by the Headquarters of these groups, the vast majority of managers hope that their group will (re)invest in France in the near future, with the prospect of new international development orientations for companies due to the economic situation created by the Covid-19 outbreak.



Lyon must successfully capitalise on these strengths, while relying on its ecosystem and own assets. The relationships built with innovation, industry and technological clusters are a significant example.

In the Lyon area, 8 clusters (of the 48 in France) are working to export innovation beyond the region, and in particular

abroad. Aderly is working alongside them to support this movement, for example during special trips, accompanying Lyonbiopôle to North America, Aerospace Cluster to the United States, and Axelera and AxelOne to Japan.

The consistency of the technological ecosystems thus helps to create synergy in the foreign markets targeted by the sectors and clusters, such as the United States, Canada, Japan and China, as well as in the 3 other regions of the "Four Motors For Europe" initiative. The Agency is also assessing the potential weight of two new regions with unique specific features, India and Brazil.

Likewise, the delegations organised by Lyon Métropole, the Lyon Métropole Saint-Étienne Roanne Chamber of Commerce and Industry (CCI) and their partners, help to increase international awareness and by scheduling meetings with companies with the support of experts and political leaders based on the specific needs and challenges (e.g. missions to the United Arab Emirates and Japan or during the Jacques Cartier Interviews in Montreal).

The process implemented to prospect companies internationally has been developed through careful consideration, shaped by the Agency's position on socioeconomic and ecological transition challenges, as well as on sustainability and the long-term nature of investment projects.



- Source: EY Attractiveness Survey, June 2019
Question: What are the most attractive regions for your investments? Total number of respondents: 506. The size of the graph shows the percentage of investors who chose this country in particular as the most attractive region.
- Source: Ipsos, France's attractiveness according to managers of foreign companies set up in France, November 2019
Question: Generally speaking, do you feel that France is today an attractive country for companies?
- Source: Ipsos, France's attractiveness according to managers of foreign companies set up in France, November 2019
Question: Generally speaking, what is France's image at your world headquarters?

SOME ASPECTS OF LYON'S ECONOMIC ATTRACTIVENESS



Of foreign-capital companies* in the Lyon metropolitan area.
Source: Diane-bureau van Dijk
(*companies with at least one legal entity as a shareholder, with sales of over €100k)



RENOWNED UNIVERSITIES

20,000

foreign students at University of Lyon and Saint-Étienne



Leading trio of companies established by Aderly over the past 10 years:

- Germany: 17%
- United States: 14%
- Italy: 9%

(Companies still in activity established between January 2010 and December 2019)



Lyon also shines worldwide thanks to its major international organisations: IARC, WHO, Interpol, Handicap International and others.



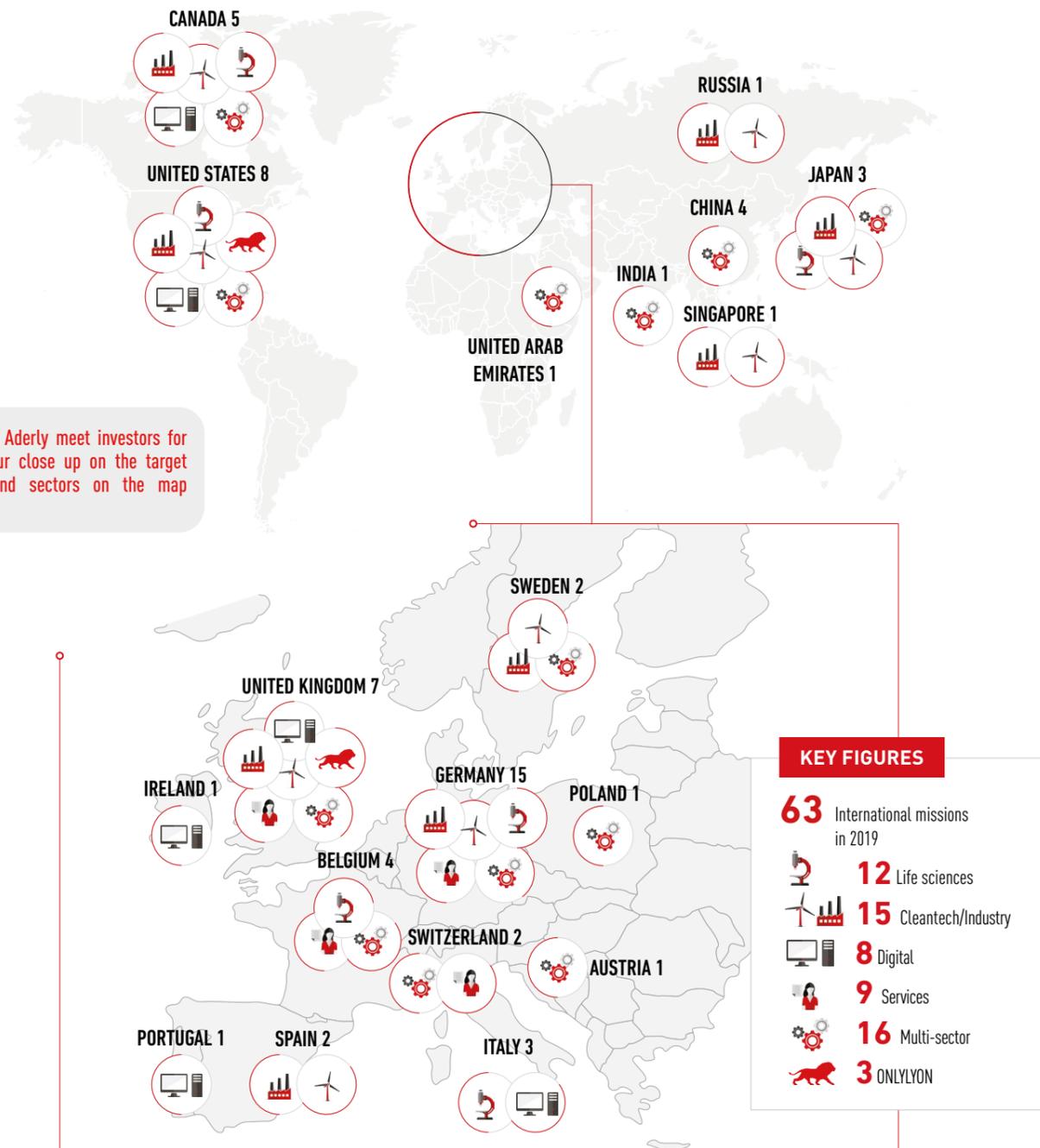
Lyon joins the world's top 50 congress cities. It gained 22 places and ranks 41st out of 424, ahead of New York, Melbourne, Toronto or Chicago ...
Source: ICCA 2019 ranking



FOCUS ON INTERNATIONAL ACTIVITY...

Since 2009, Lyon's ecosystem has attracted more than 400 foreign-capital companies thanks to Aderly's support, with the trio of Germany, the United States and Italy leading the pack. Japan, Switzerland, Belgium, Canada and, more recently, China also account for a significant share of FDI in the region. In 2019, the momentum continues with Aderly helping 49 foreign-capital businesses to invest in the Lyon area.

Where does Aderly meet investors for FDI? See our close up on the target countries and sectors on the map opposite.



LIFE SCIENCES, EMBODYING INTERNATIONAL DEVELOPMENT

Efforts in the Health and Life Sciences sectors are almost exclusively geared to foreign markets, with three main target regions: North America, Western Europe and Asia, with Japan and China. The initiatives of the Agency and its partners feature major flagship events with a global reach, such as the BIO International Convention, a key biotech event where the Agency took part in B2B meetings and organised events to showcase the Lyon ecosystem.

In addition, Lyon's biotech ecosystem regularly participates in the European edition of the BIO International Convention (in Germany in 2019), as well as in other flagship events such as The MedTech Conference (Boston), MedTech Summit (Nuremberg) and Medica (Düsseldorf).

Lyon's attractiveness is also promoted during direct meetings with business leaders, such as in Minneapolis (a global hub for MedTech), Toronto and Montreal (on the topic of Artificial Intelligence applied to health), Belgium,



In 2019, at BIO Philadelphia, a round table co-organised by Aderly, Lyonbiopôle, the Lyon Métropole Saint-Étienne Roanne CCI and Lyon Metropole, featuring the CEOs of bioMérieux and Alizée Pharma 3, drew an international audience of almost 120 people.

Baden-Württemberg, northern Italy and Japan with Lyon experts in 3D printing for health (3d.FAB), and in China in the cosmetics field.

In 2019, Aderly also took part in international events in France, such as In-Cosmetics Global in Paris, with Cosmet'In Lyon presenting Lyon's very dense dermocosmetics ecosystem, and the MedTech Forum, an annual conference held in Paris.

In 2019, nearly 400 companies, including 80% international firms, expressed their interest in Lyon and its Health ecosystem during meetings, with 20 concrete leads for investment projects.

INDUSTRIAL-DIGITAL CONVERGENCE: EXPERTISE THAT SETS LYON APART



Konecranes is one of the world's three leading players in port cranes and lifting equipment. The group employs 16,100 people in 50 countries, including around 750 in France, making it one of Finland's main investors in France. In 2018, the group's sales reached €3.2 billion.

THE PROJECT

Konecranes has set up its new world R&D centre in Lyon to continue the digitisation of its products, services and operations. This centre specialises in predictive analysis, computerised measurement of component wear and anticipated maintenance. With 20,000 devices connected worldwide and more than 600,000 active customers, the group is convinced that creating value from data will

profoundly transform the handling sector and enable it to generate new business models and added value for its customers.

SUPPORT

Presentation of the Lyon area's advantages (economic environment, areas of expertise, innovation clusters and networks, etc.), overview of the aid available for R&D, and advice on human resources and employee mobility.

"We chose Lyon because the metropolitan area offers an excellent combination in terms of advanced data research capabilities and industrial focus, as well as top-flight expertise in AI, machine learning and industry 4.0. In addition, with the University of Lyon, the Lyon area has a large pool of scientists and researchers specializing in data, essential for developing Konecranes' project."

Juha Pankakoski, Executive Vice President, Technologies



FOCUS ON INTERNATIONAL ACTIVITY...

THE 60-YEAR PARTNERSHIP BETWEEN LYON AND YOKOHAMA: 2 MUTUALLY BENEFICIAL BUSINESS ECOSYSTEMS

Japan, **Asia's leading investor in France** (with €14 billion in FDI stocks) could see further growth in its trade relations and investments following the free trade agreement signed in February with the European Union.

Experience has shown that Japanese companies often reinvest in their existing foreign subsidiaries, making it essential for local economic players to closely support Japanese companies already active in Lyon (for example Toray, Kose, Nikko and Nagase, namely for the regional Skin Biology project). **Japan and Lyon are complementary in the highly technical tissue engineering business**, and more broadly in dermocosmetology, which is a true asset to help attract Japanese companies.

Europe's technological and political lead in the circular economy (and, as a result, in protecting the environment, with, for example, the banning of 11 single-use plastic products), provides yet another opportunity to interest Japanese companies. In the Life Sciences sector, this approach led to this year's creation of Hitachi Lyon Lab in Lyon by Hitachi Healthcare, the result of a partnership with the Léon Bérard Cancer Research Center for a collaborative project in AI-based diagnostic oncology and medical imaging (see below).



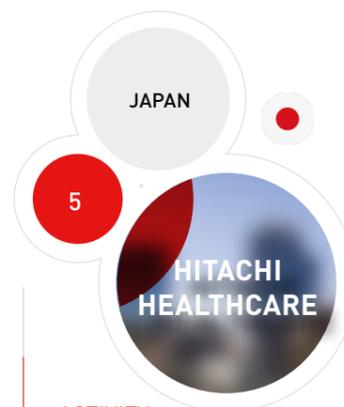
In November 2019, Japanese group Hitachi and the Léon Bérard Cancer Research Center (CLB), one of the major Lyon-based cancer institutes, signed a research and development agreement to improve the efficacy of diagnostics and cancer treatments, as well as to create a new research laboratory called Hitachi Lyon Lab at the CLB facilities.

Hitachi and CLB will jointly develop new screening and diagnostics technologies based on medical imaging, such as CT / MRI, using artificial intelligence. These technologies enable the detection of potential cancers and help radiologists to make their diagnoses. Tools to predict radiation therapy response will also be developed through the use of transcriptomic and genomic data from tumours. Hitachi and the CLB will thus conduct their collaborative research by combining clinical expertise and data related to cancer treatments in patients at the centre with Hitachi's expertise in diagnostic imaging and IT / AI.



SUPPORT

The Agency helped make this innovative project a reality, by putting Jean-Yves Blay, Managing Director of the Léon Bérard Cancer Research Centre, in touch with the CEOs and CTOs of Hitachi Health Care in Japan in 2017



ACTIVITY

AI solutions for medical imaging



ACTIVITY

Production and packaging of cosmetic masks

NEARLY 90 YEARS AFTER THE FOUNDING OF THE FRANCO-CHINESE INSTITUTE, CONCRETE BUSINESS TIES BETWEEN LYON AND CHINA

The great efforts Lyon has been making for several years to develop stronger relationships with China clearly paid off in 2018 with excellent results (7 companies of Chinese origin set up in the area) and continued to bear fruit in 2019. Thanks to the consolidation of its Chinese networks and an increasingly analytical, highly targeted approach, 6 companies set

up in 2019, with 145 new jobs forecast within 3 years. This close work with influencers and precise targeting enabled Lyon to bring Chinese cosmetics firm Dowell & Yidai to the area despite tough transregional competition (read below).

Dowell & Yidai is a Taiwan-managed Chinese company in the cosmetics sector.

THE PROJECT

Dowell & Yidai opened its 9th factory worldwide and its 1st in France, at the Plaine de l'Ain Industrial Park. The factory will produce 100% organic, natural masks, creams and other beauty products.

WHY LYON?

Dowell & Yidai chose to set up in the Lyon area to capitalise on French know-how, the "Made in France" image and easy networking with partners active in the region. It will thus be able to take advantage of high-performance research centres and cutting-edge companies that enable all of the region's cosmetic industry players to innovate.

SUPPORT

Aderly helped Dowell & Yidai in its set up by assisting the company in its search for premises, in its administrative procedures, in contacts with Lyon organisations and in the area of communication.



A 200-member delegation, headed by Zhang Ting and Lin Rui Yang, celebrities and senior managers of TST, came to Lyon on 27 September 2019 for the grand opening of the new factory.

"Dowell & Yidai chose PIPA as the location for its 9th factory, which is expected to create 80 jobs within 3 years. PIPA was able to provide a quick real estate solution by offering a building that can be easily adapted to the creation of a production unit for masks, creams and other 100% organic natural beauty products, and flexible, with adjoining land available that will soon allow for future expansion of the site. The other asset was PIPA's location, in the heart of a leading dermocosmetology region as well as near Lyon-Saint Exupéry international airport. Indeed, the TST group, one of the brand's investors, will hold tours and training at the facility for its network of 8 million Asian resellers. This set-up is yet another concrete example of the partnership between PIPA and Aderly."



Hugues de Beaupuy, Managing Director, Plaine de l'Ain Industrial Park

EHANG PRESENTS ITS TAXI DRONE AT LYON'S SOLUTRANS EXHIBITION



In 2018, Ehang, a leader in commercial drones and taxi drones for passenger transport, chose the Lyon metropolitan area to set up its 1st European support centre. In 2019, the Chinese group came to Lyon to exhibit its taxi drone at Solutrans, the international trade fair for road and urban transport professionals.

...AS WELL AS ON VERY PROMISING FRENCH PROJECTS

FRANCE

100

SAFRAN LANDING SYSTEMS

ACTIVITY
Aircraft braking solutions

Safran Landing Systems is the world leader in aircraft landing and braking solutions. The company equips and provides maintenance for 27,000 aircraft that make over 70,000 landings every day. The company currently has more than 7,600 employees in Europe, North America and Asia.



THE PROJECT

Safran Landing Systems chose Feyzin, in the heart of Chemicals Valley, to set up its new factory, the group's 4th for this activity and the 2nd in the Lyon area. Safran's other Lyon plant, located in nearby Villeurbanne for the past 30 years, is also the group's world research center for friction materials.

SUPPORT

In collaboration with Lyon Metropole, Aderly offered the group a full range of support in order to convince it to choose Lyon, which was facing tough competition from the United States.

FRANCE

300

ONEPOINT

ACTIVITY
Digital business transformation

Onepoint, an international player in the digital transformation of businesses and organisations, offers its customers the right digital strategies and tools to enable them to innovate and remain competitive in the digital age.

THE PROJECT

The group chose Lyon for the creation of its new excellence and innovation centre and has moved into the Grand Hôtel-Dieu, with the aim of reaching 300 employees within 3 years. The new branch aims to bring Onepoint closer to local decision-makers in the Lyon metropolitan area's sectors of excellence, namely Smart Cities, health and industry 4.0.

SUPPORT

Aderly's expertise enabled the company to identify the right players to support an intensive recruitment process and the sharing of good practices to simplify their set up in the region. Aderly introduced Onepoint to the Lyon ecosystem, its players and networks, and helped the company's staff make local business connections.

“Everyone knows how dynamic Lyon is. The city's ability to innovate, the strength of its ecosystem and the quality of its talents are important assets in enabling us to meet our objectives and carry out our mission: to help businesses and organizations transform themselves to fully understand the world of tomorrow. For Onepoint, this is a strategic choice which also allows us to stay close to our customers in France. As you can see, we are here to do business!”

David Layani, Founder



Eurekam markets its Drugcam device - an AI-based video assistance system that helps to check preparations of anticancer drugs - to professionals and health establishments. The one-of-a-kind Drugcam helps reduce the risk of medication errors to zero. Today, it is France's leader in the safety of injectable oncological preparations.

Eurekam's arrival is in line with H7's mission, which favours companies that have already brought their first products to market. Eurekam will also join the Lyonbiopôle global innovation cluster, the hub of a cutting-edge international health ecosystem.

SUPPORT

Eurekam received Aderly's support in the search for its premises, in making contact with H7, and for communication on this new set up.

THE PROJECT

Backed by its long-standing investor Sofimac Innovation, Eurekam joined the H7 start-up and scale-up accelerator in Lyon-Confluence in autumn 2019.



“Today, Eurekam is a special partner to most leading establishments in cancer research and treatment. Building on this leading position, we decided to open a second facility in Lyon-Confluence in order to accelerate, along with our investors, our drive to conquer the French, European and world markets. We are also working with health clusters on new applications for our technology, which is currently dedicated to oncology.”

Loïc Tamarelle, Co-Founder

Demeter is France's first cleantech investment fund, managing €800 million via 9 investment vehicles in 3 areas: innovation, growth and infrastructure.

THE PROJECT

The group wanted to open its own office in Lyon to be active on the increasingly important Auvergne Rhône-Alpes market, and to set up a regional fund.

SUPPORT

Aderly first met Demeter during the Cleantech Group European Advisory Board meeting that Lyon hosted in 2011. Staying in close contact with the company until the Lyon Cleantech Forum that the Agency helped bring to the city in 2016, Aderly also organised a seminar for Demeter at Pollutec 2016, in close collaboration with Axelera. Won over by the local ecosystem, Demeter confirmed its interest in opening an office in Lyon.

FRANCE

10

EUREKAM

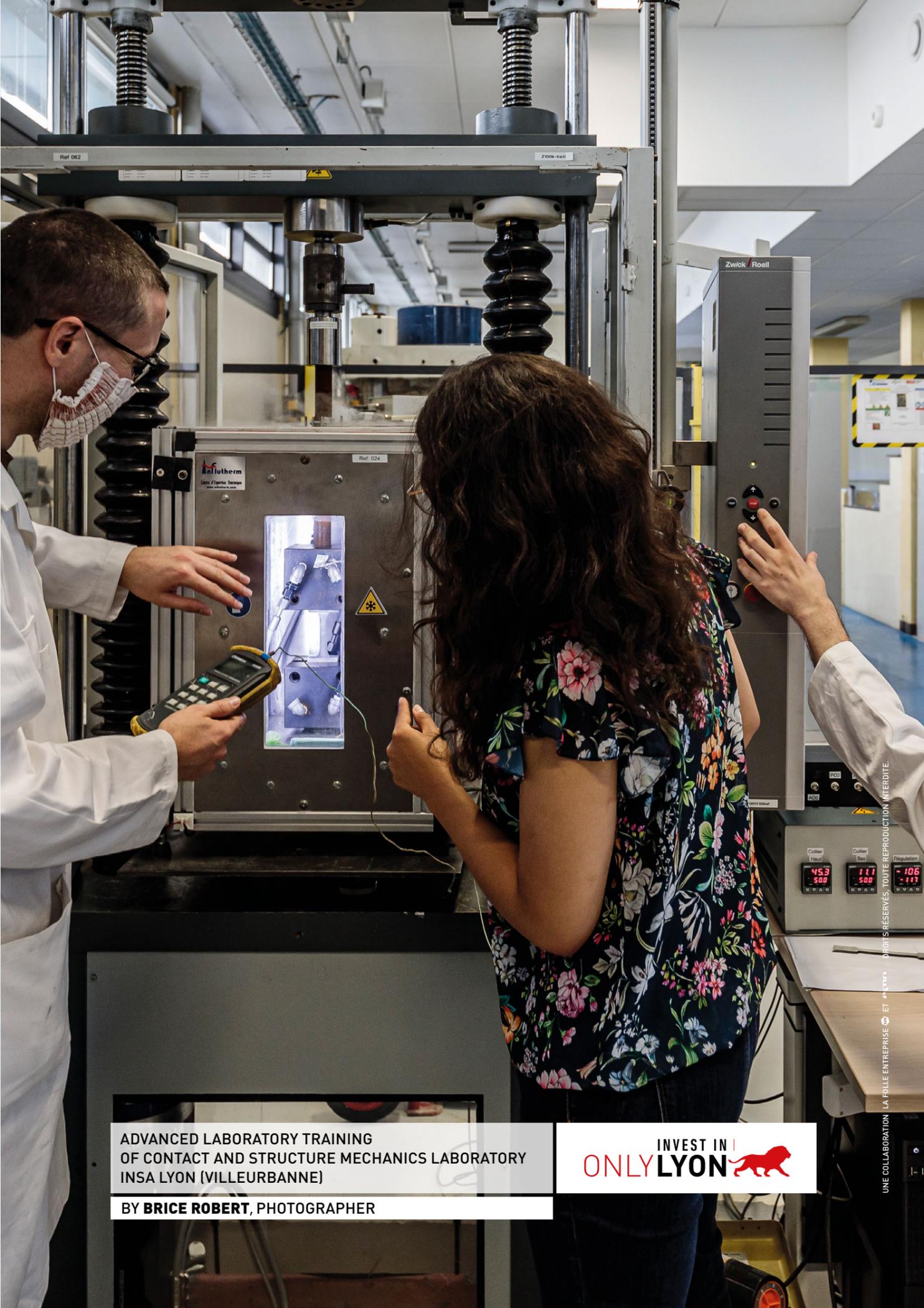
ACTIVITY
Chemotherapy preparation safety solutions

FRANCE

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DEMETER

ACTIVITY
Cleantech investment fund



PART 2

MORE PRODUCTIVE, LONG-TERM, SUSTAINABLE INVESTMENTS

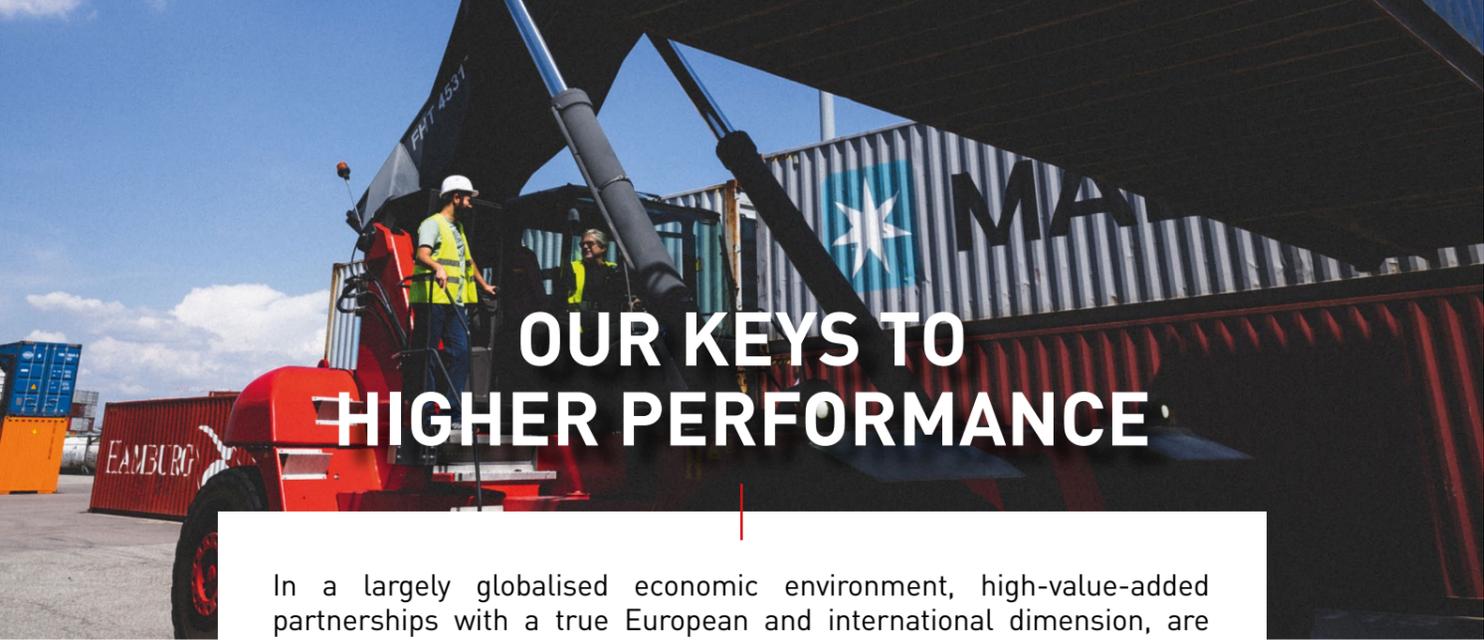
OUR KEYS TO HIGHER PERFORMANCE, A UNIFIED SCOPE AND A TAILOR-MADE
REGIONAL APPROACH: STRONGER TOGETHER...

ADVANCED LABORATORY TRAINING
OF CONTACT AND STRUCTURE MECHANICS LABORATORY
INSA LYON (VILLEURBANNE)

BY BRICE ROBERT, PHOTOGRAPHER

INVEST IN
ONLY LYON 

UNE COLLABORATION LA FILLE ENTREPRISE ET PHOTO... DROITS RÉSERVÉS. TOUTE REPRODUCTION INTERDITE.



OUR KEYS TO HIGHER PERFORMANCE

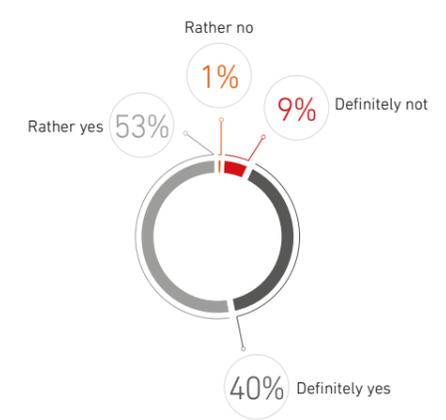
In a largely globalised economic environment, high-value-added partnerships with a true European and international dimension, are decisive.

Because Europe continues to be considered as a relatively stable market compared to the other two key regions (North America and Asia), Aderly has strengthened its relations with its European partners, mainly through two initiatives: (1) **joining Eurada**, the European Association of Development Agencies; (2) **being an active contributor within a peer group** composed of around thirty of the main regional development agencies in northern and western Europe [the 'IPA Club'] to share experiences and perform collaborative benchmarking.

Playing a proactive role in the 'IPA Club' makes Lyon highly visible and enables it to show initiative in this informal group where Europe's largest cities discuss their shared challenges (access to talent, performance metrics, funding and visibility compared to other regions around the world), and more recently on working to handle the economic crisis due to the Covid-19 pandemic.

These partnerships are also of particular importance in contributing to sustainable economic development, even more so today, when close ties and pan-European relations are once again becoming a priority. By joining the movement to achieve the 17 United Nations Sustainable Development Goals (SDGs) set out in 2015, Aderly is showing the international stage how Lyon is tackling the challenges of the future and in line with the growing number of companies that understand the need and the opportunity created by the SDGs. This is illustrated by the results of an IPSOS survey (see graph below).

Willingness to intensify the company's commitment in the area of inclusion



Source: Ipsos, France's attractiveness according to managers of foreign countries set up in France, November 2019
Question: Is your company ready to intensify its commitment in the area of inclusion? (SDG 1, 5, 8, 10, 11, 16)

CLOSEUP



Attracting foreign start-ups also means attracting foreign talent. The presence of international talent in turn makes other international companies more attractive. As a result, the relationships between local entrepreneurs and foreign ecosystems develop their acculturation, which is key to their expansion outside the country. For this reason, **Aderly and H7 have built a partnership** to offer a support program dedicated to international tech companies, called the HELLO program, which has already proven a remarkable success with tech communities and foreign start-ups. In 2019, when H7 opened, more than forty partners, delegations and international companies visited the facility, a true French Tech showcase for the local ecosystem and a key component of the region's attractiveness.



MANAGING DIRECTOR

LX GROUP FRANCE

HUGO BLANC

The LX Group has always had close relationships with Europe, whether with its staff or its partners. Europe was thus a natural choice to be our first region for our international expansion. We explored several potential locations for our European headquarters. Lyon had several advantages from the start, but the real difference comes from the remarkable assistance and support we received from Aderly and H7.

Both helped us to understand the regional ecosystem and get organised to complete administrative procedures. They also put us in touch with the perfect local partner to finally open our office in this magical, vibrant place. Aderly is definitely the ideal contact point for any company wishing to develop its activities in France or in Europe.

After the productive IPA meeting upon invitation by Invest in Lyon in 2018, the Vienna Business Agency had the great pleasure to host the European investment promotion agencies 2019 in Vienna. As one of the results of the working sessions, the participants decided to jointly promote Europe and its values, aside and in addition to the respective cities and regions.



This led to the initiation of the movement #ChooseEurope.

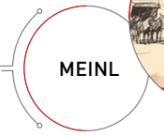
Vienna and Lyon have a lot in common in their respective FDI approaches. Besides the shared areas of strength in life sciences, mobility and smart city, both Lyon and Vienna enjoy excellent cuisine and gastronomic variety.

Thus, we are very happy to see Julius Meinel, one of Vienna's most famous coffee roasting companies, recently choosing Lyon for its French base. We see this step as the start of mutually beneficial dynamics between our two cities to welcome the other's companies for business.

We would like to congratulate Invest in Lyon on their outstanding success in 2019 and we are looking forward to cooperating even closer and achieving joint successes in 2020, because international collaboration is key to our European cities.

Sabine Ohler, Director - International Business Vienna Business Agency (Austria)

CLOSEUP



Meinl is an Austrian premium coffee and tea company active in 70 countries through 21 subsidiaries around the world. It produces 16,000 tons of roasted coffee per year at two production sites in Austria and Italy and generates nearly €200 million in sales.

In 2019, the company chose to create its French subsidiary and its Western Europe / Middle East headquarters in Lyon, with the aim of developing its activity both through its own distribution network and third-party distributors.

Aderly's support focused on tax and legal advice, finding accommodation for several employees, putting Meinl in touch with the Lyon Metropole Saint-Étienne Roanne CCI and local hospitality-sector organisations and networks, assisting in business development, identifying potential partners for the Lyon area, performing business comparisons between Paris and Lyon (office rental costs, salary levels, etc.), helping with recruitment and searching for premises.

ATTRACTIVENESS LINKED TO THE DIVERSE RANGE OF PARTNER REGIONS

Through its wide range of ecosystems and setup solutions, the great diversity within the Lyon area helps the city stand out, offering a variety of solutions to foster adaptation and flexibility, true advantages in these uncertain, complex times.

With insights from UrbaLyon, the Lyon metropolitan area's town planning agency, and in order to bring together two philosophies – being a pool of opportunities and offering a diverse range of solutions – Aderly focuses on a broad territory that can enable it to meet these challenges, the Lyon Metropolitan Area (AML).

The AML helps promote the region clearly to investors, by presenting a unified, consistent economic ecosystem to regional partners with a unique approach to local economic development.

To fully capitalise on this diversity, the Agency builds "tailor-made" relationships with its regional partners, in order to meet their different respective challenges. These partners are the ones who talk about it best...

LYON METROPOLE AND THE LYON METROPOLE SAINT-ÉTIENNE ROANNE CCI: THE AGENCY'S FOUNDERS AND PARTNERS EVERY DAY

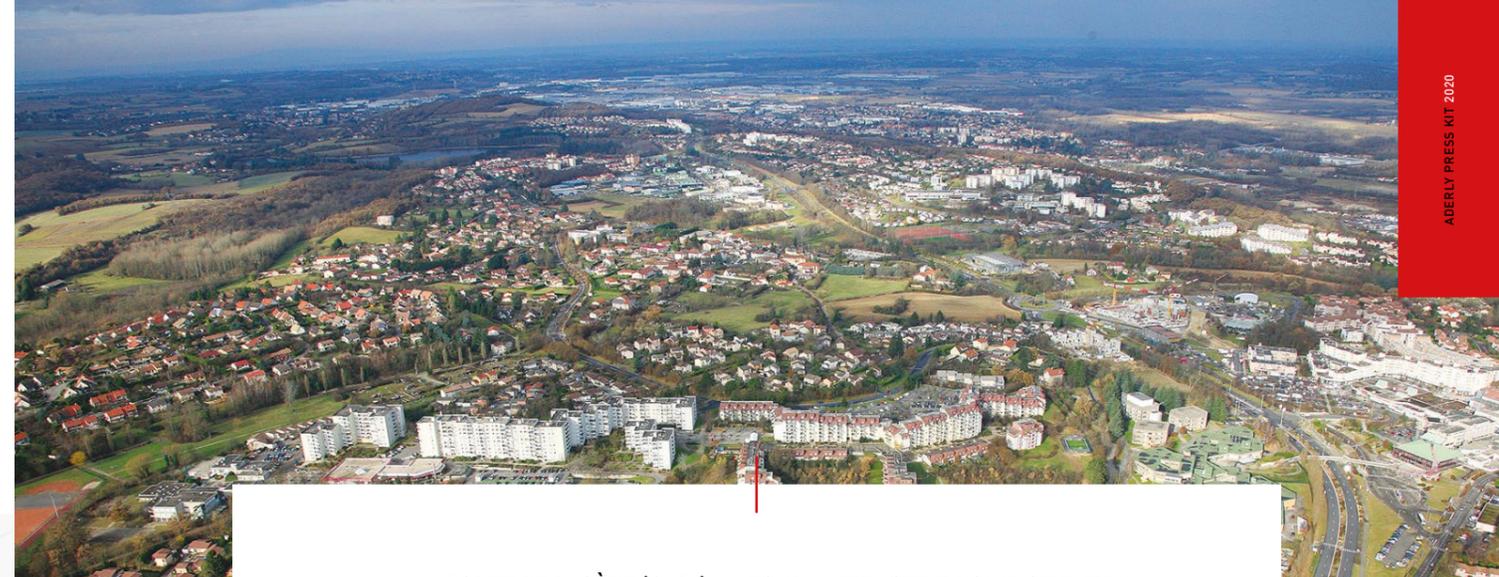


Given the energy, mobility, social and environmental challenges facing cities today, there is undeniably a great variety of town planning solutions that come from all horizons, including abroad. Thus, since 2014, the Smart City team and Aderly have been working together to identify and support international investment projects focusing on innovative solutions. This is done, for example, through joint missions to Boston and Montreal, or at industry events such as the Smart City Expo World Congress in Barcelona, a global forum that showcases a full range of innovations to make cities more desirable and welcoming.

Pamela Vennin, Project Manager, Major Experiments and Replications, Lyon Metropole

As soon as I arrived at the Lyon Metropole Saint-Étienne Roanne Chamber of Commerce and Industry, I was determined to rely on synergy with Aderly, namely in supporting companies set up by the Agency. Thanks to our dedicated operational expertise and services such as economic intelligence and access to innovation, these companies can consolidate their development. We are also working together on the urban development strategy, shaping the areas that Aderly can tomorrow offer its clients to set up their businesses. With this key idea in mind, working with the Agency's teams enables the Lyon-Saint-Étienne corridor to become increasingly competitive from an entrepreneurial standpoint.

Alexis Giloppe, Director for Industry, Competitiveness and Regions, Lyon Metropole Saint-Étienne Roanne CCI



PORTE DE L'ISÈRE (CAPI): A HIGHLY ATTRACTIVE POINT OF ENTRY



Aderly and CAPI have been forging a partnership since 2015 that enables the Agency to prospect and support set up projects in the CAPI area. In 2019, 7 projects with a predicted 130 new jobs within 3 years were supported, to which we can also add the temporary set up of Poma. Beyond this quantitative aspect, the quality of the projects must be highlighted. Our teams supported the set up of a new drug

delivery systems production unit at Nemera (see below), which should help to create 50 jobs. Our Saint-Quentin-Fallavier site was in competition with one of the group's other locations in Germany. In two of the region's sectors of excellence, logistics and sustainable construction, our collaboration enabled the set up of British firm Acorn Stairlifts and Belgian company Geos (see opposite).

Raymond Feysaguet, Vice President for Economic Development, Porte de l'Isère Metropolitan Community (CAPI)

CLOSEUP

GEOS LABORATORIES

Geos Laboratories is a leading Belgian company specialised in analysing construction materials. The group recently set up a laboratory in the northern Isère area, in Vaulx-Milieu, that analyses aggregates, soils and concrete.

Geos Laboratories' setup was supported by Aderly, namely through contacts with local players in the industry, searches for and visits to premises suited to its activity, hiring of staff and communication to promote the opening of this new laboratory.

Nemera specialises in the design, manufacture and assembly of drug delivery systems in the pharmaceutical and biotechnology industries.

THE PROJECT

Nemera expanded its production buildings, within the company's world headquarters and manufacturing facility in La Verpillière in the northern Isère area. This 3,150 square-meter production unit (project cost: €19.5 million) will produce plastic components for Novo Nordisk, a Danish healthcare company and world leader in the treatment of diabetes. Once it begins operating in June 2020, this new manufacturing unit will have the capacity to produce 1.5 billion parts per year.



SUPPORT

The Agency continues to support Nemera through its lobbying of public authorities, through contacts with specialised service providers and through operational advice for the hiring of new staff.

UNITED KINGDOM & FRANCE

50

NEMERA

ACTIVITY

Drug delivery systems

ATTRACTIVENESS LINKED TO THE DIVERSE RANGE OF PARTNER REGIONS

ONE REGION, 2 CITIES, A DUAL ATTRACTIVENESS

The partnership between Saint-Étienne Métropole and Aderly is celebrating its 5th anniversary in 2020. **2019 was a great year both in terms of set-ups and collaborative actions.**

Thus, eight new companies have chosen Saint-Étienne Métropole. One of these is Senselia, a cosmetics and food supplements company that has opened new offices in Saint-Chamond. Another is VR Initiative, a firm developing a virtual reality product for businesses to highlight professions with staffing shortages, which has chosen to set up a new office in Saint-Etienne (see below).

These results have been possible thanks in particular to the connections that the Agency has been able to create locally. One concrete example is **Manutech**, which brings together public research and industry players

at a cutting-edge facility that enables them to capitalise on the scientific and industrial potential that femtosecond lasers offer. This facility is a key to attracting and welcoming new companies to the region, such as Swiss firm Kejako, which develops innovative ophthalmological solutions and set up its operations in 2018.

Another example is the **Cité du design**, which accompanied the Agency to Montreal in 2019 on a joint prospecting mission. Supported by Saint-Étienne Métropole, the city of Saint-Étienne, the Region and the State, the Cité du design - Higher Institute for Art and Design, a Public Establishment for Cultural Cooperation (EPCC), is a platform for higher education, research, economic development and the promotion of culture, focusing on design and art.

“ We provide support for Aderly’s missions, bringing our experience in design to complement Aderly’s expertise at promoting the attractiveness of our region, and we also play a role in convincing stakeholders to confirm their set-up projects. Aderly is by our side during events organised by the Cité du design, such as the Saint-Étienne International Design Biennial. We also serve as experts during business meetings with Aderly, for example as part of our “design and digital” prospecting mission last November in Montreal alongside the Jacques Cartier Interviews.



Isabelle Vêrilhac, Director, International Affairs and Innovation, Cité du design



“ Originally, VR Initiative positioned itself in an e-sport and virtual reality business. In 2018, we chose to develop a new product for companies (Promap) that uses virtual reality to highlight professions in which it is difficult to recruit staff. As well, we have signed a partnership with the Pôle Emploi job agency to equip branches around the region with virtual reality headsets. The wood industry has also asked us to promote the sector among young people. In order to develop this business in the Lyon area, VR Initiative chose to open a new office in Saint-Etienne. Aderly supported us in our search for offices, in recruiting staff and in contacts with local stakeholders (CPME, business clubs, clusters and others), as well as in communication to promote this new set-up.

Tom Escalle, Managing Director, VR Initiative

WEST LYON, WHERE THE CITY AND SUBURBS WORK TOGETHER

CLOSEUP

EATON
MARTEK
POWER

Martek Power (with annual sales of €40 million and 200 employees) has been established in Montrottier, in the Monts du Lyonnais hillsides, for 22 years. Acquired by Eaton (USA, 99,000 employees and sales of \$21.6 billion) in 2012, it develops and manufactures a wide range of standard and specialised electrical energy conversion systems. In 2019, the Montrottier facility was chosen among several competing locations for the set up of a new activity: the manufacture of inverters for hybrid vehicles (eMobility). Aderly supported Eaton-Martek Power in its recruitment, in networking with local stakeholders (the Pôle Emploi job agency, business clubs, recruitment firms, etc.), as well in assessing potential funding and subsidies for investments in machinery to be used in this project.



In 2017, Aderly signed an agreement with the communities of West Lyon (COR-CCPA-CCMDL), which had already started a partnership in 2015. This partnership performs targeted prospecting in specific sectors and provides support for local companies in their development projects.

On a daily basis, this means Aderly is continuously active in the area and fully integrated in the team responsible for economic development within the community, with joint visits to companies and participation in economic working groups and events in the locality.

One example of fruitful cooperation is the close community support on the project to set up a logistics unit for Fresenius Medical Care SMAD. This includes support for the company in getting a head start on recruitment, the organisation of a press conference, relations with the national media and more (see below).

Our partnership has become a key facet of our local economic development strategy, as it gives us the unique ability to prospect for inbound investment projects and greater visibility in leading business networks. It also enables us to connect with business stakeholders in specialised fields such as the SSE, which translates into concrete benefits for our community.

Pierre Chambe, Head of Economic Development, Pays de l'Arbresle Community (CCPA)



GERMANY'S FRESENIUS GROUP CONTINUES TO EXPAND IN THE LYON AREA

FRESENIUS, A WORLD LEADER

World-renowned German healthcare services firm Fresenius employs more than 276,000 people and has revenues of €33.5 billion. Within the group, the Fresenius Medical Care (FMC) subsidiary specialises in dialysis. In 1987, it acquired Société de Matériel Annexes pour la Dialyse (SMAD) located in Savigny, near l'Arbresle in Rhône county, which became FMC-SMAD.

SIGNIFICANT INVESTMENT

In all, between 2014 and 2020, Fresenius will have invested nearly €250 million at the Savigny facility and created 350 additional jobs, increasing the workforce by almost 40%. The Savigny plant currently employs 800 people.

A NEW MILESTONE

The plant recently invested in eight polysulfone (PS) fiber production lines. These fibers are used to assemble filters or dialyzers which, during dialysis sessions, help to filter blood and toxins. Recently, a new dialyzer assembly line has also been added, as have two lines for the production of sodium bicarbonate bags. Overall, 98% of FMC-SMAD's production is exported to the United States, South Korea, China and other markets. The 110,000 sq. m Savigny plant is the Fresenius group's third largest facility, and is also France's leading manufacturer of dialysis products.

“ Aderly and the Pays de l'Arbresle Community have been active at every stage of the group's development in the Lyon area, and their joint support has been precious in making our investment choices. In particular, Aderly and the CCPA helped to fast-track administrative procedures to enable Fresenius Medical Care-SMAD to offer competitive solutions that can be quickly implemented.



Thierry Eyrard, Senior Vice President Manufacturing Strategy, Global Manufacturing Quality and Supply, FMC

GOING FURTHER, TOGETHER!

Now, more than ever, it is impossible to succeed alone in such a complex, competitive economic environment. Lyon's attractiveness is above all a testament to the collective momentum created by all of the region's economic and business stakeholders, who together build and consolidate the Lyon metropolitan area's wide-ranging attractiveness, true wealth of the region to face and overcome today's challenges as well as those in the future

BOEHRINGER INGELHEIM, LYON METROPOLE AND ADERLY: WINNERS OF THE ATTRACTIVE FRANCE AWARDS 2019

The Attractive France Awards honour 5 pairs of regions and businesses each year for their emblematic, proactive or innovative achievements. In September 2019, Boehringer Ingelheim and Aderly took home the Attractive France Award in the 'Large Group / International' category, acknowledging the Lyon area's 3-year drive to promote the region to German group Boehringer Ingelheim and the close collaboration that resulted in the set up of a state-of-the-art factory that manufactures veterinary vaccines against foot-and-mouth disease. Faced with competition from 8 other regions outside of France, Lyon's comprehensive, buoyant Life Sciences ecosystem and the quality of its higher education network made all the difference. This choice strengthens Lyon's position as the heart of Europe's "Vaccine Valley" and further roots the pharmaceutical group in the region, with the creation of nearly 140 jobs in addition to the 1,500 already spread over 5 facilities.



INTERNATIONAL TALENT SERVICE, THE LYON AREA'S COLLABORATIVE EXPAT CENTRE

1,084
appointments
handled by the
team in 2019

Since March 2018, the Agency's Mobility team has been actively contributing to the "International Talent Service" system, an initiative of Lyon Metropole, the Rhône Prefecture, the Lyon Metropole Saint-Étienne Roanne CCI and Aderly, to make the city more attractive to foreign talent by fast-tracking the administrative procedures for incoming workers.

An Agency team has been appointed as the main contact for anyone requesting a 'Talent Passport' or 'Seconded ICT Employee' residence permit who will be living in Rhône county. Espace ULYS, Direccte and IARC handle these procedures for other types of staff, such as researchers. This joint approach helps to attract more talent and more investment to Lyon.

IF YOU WANT TO GO FAST, GO ALONE. BUT IF YOU WANT TO GO FAR, GO TOGETHER (AFRICAN PROVERB)

In order to further build upon this collaborative momentum, Aderly is investing resources to bring together the various communities that make up its ecosystem. These include its customers (companies supported in their set up projects), its members and operational partners, ONLYLYON's private partners and 'strategic' ONLYLYON ambassadors, as well as members of the "Circle of Directors" of foreign-capital firms in Lyon.

It has thus created a 'Club' that will host several events throughout the year, such as evening parties for companies that have recently set up in the Lyon area, the "augmented" General Assembly and a series of experiential morning sessions co-developed with UrbaLyon on the theme of economic and territorial transitions (see description below).

URBALYON AND ADERLY: "THE BRAINS AND THE BRAWN"



While Aderly and UrbaLyon (the Lyon Town Planning Agency) have been rubbing shoulders for many years, 2019 is to be remembered as a milestone in their relationship. It not only enabled the two agencies and their staff to get to know each other better, but more importantly allowed them to initiate joint actions by combining their complementary expertise.

Initiatives such as large-scale observation of the Lyon metropolitan area, local involvement and the determining of new sustainable development objectives in Saint-Fons, not to mention the preparation and management of a new discussion forum that brings together all partners (experience#), will all help to bring us even closer together in 2020.

Damien Caudron, Director, UrbaLyon

The Greater Lyon Conventions Bureau (BDCS), a department of the ONLYLYON Tourism Office and Conventions Bureau, is responsible for creating international-scope industry events organised by companies or associations. Aderly supports the international companies it has helped set up in the region, in particular with the 2019 creation of a document distributed by Agency staff presenting the Convention Bureau's B2B services for the organisation of industry events.

Teams from the various local organisations have come together to detect new projects, perform networking and foster synergy to bring top-name events to Lyon, including Cleantech Forum Europe 2016, MedTech Forum 2021, the AMR - Antimicrobial Resistance Conference, the IABS- International Alliance for Biological Standardization and others.

Valérie Ducaud, Director, Conventions Bureau





PART 3

2019 RESULTS ON PAR WITH THE COLLECTIVE COMMITMENT

ADERLY'S DETAILED RESULTS FOR 2019: FIGURES, LIST OF COMPANIES
SUPPORTED AND MORE

INNOVATION ON ALL FLOORS AT H7,
AT CONFLUENCE (LYON)

BY JÉRÔME POULALIER, PHOTOGRAPHER

INVEST IN
ONLY LYON 

UNE COLLABORATION LA FOLLE ENTREPRISE ET  DROITS RÉSERVÉS. TOUTE RÉPRODUCTION INTERDITE.



KEY RESULTS IN 2019

With 114 companies and 2,427 new jobs forecast within 3 years, Aderly's results this year are similar to those in 2018. Discover the details of the 2019 results, with breakdowns by sector, by origin of capital, by function of new set-up, etc.

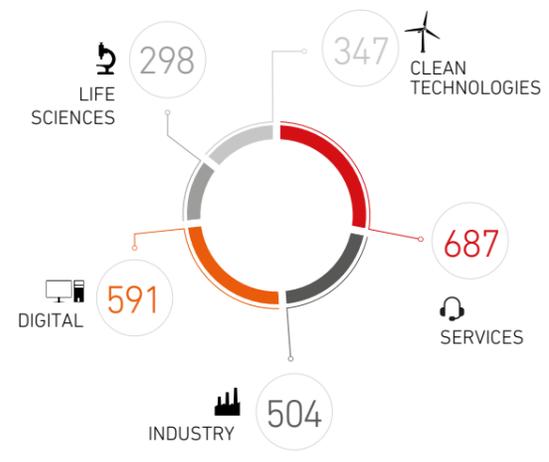
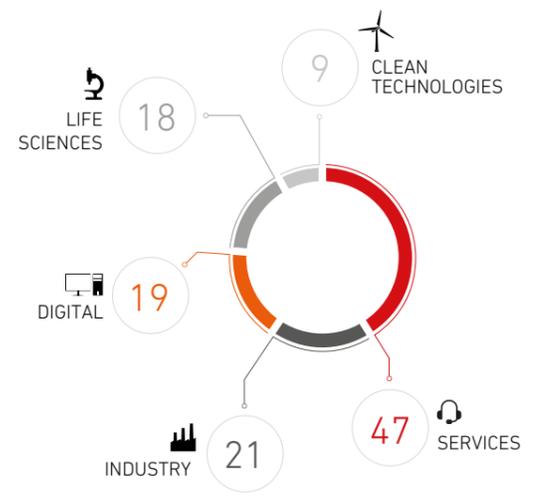
OVERALL RESULTS



BREAKDOWN BY INDUSTRY

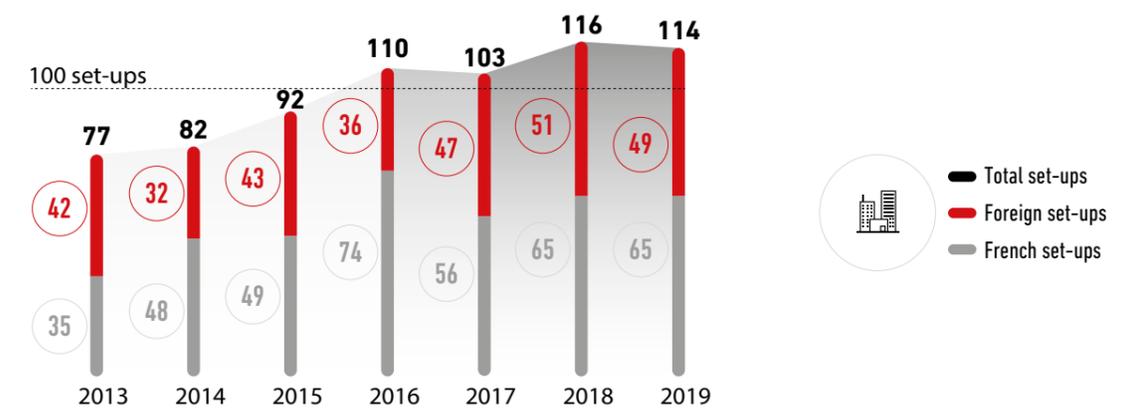
SETUPS

NEW JOBS FORECAST WITHIN 3 YEARS

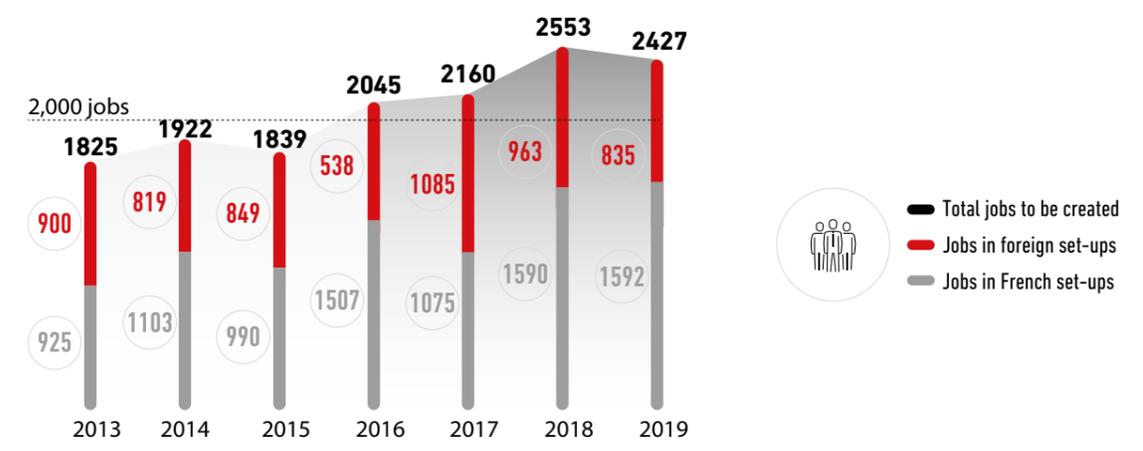


TRENDS IN RESULTS

SETUPS



JOBS



ORIGIN OF CAPITAL





KEY RESULTS IN 2019

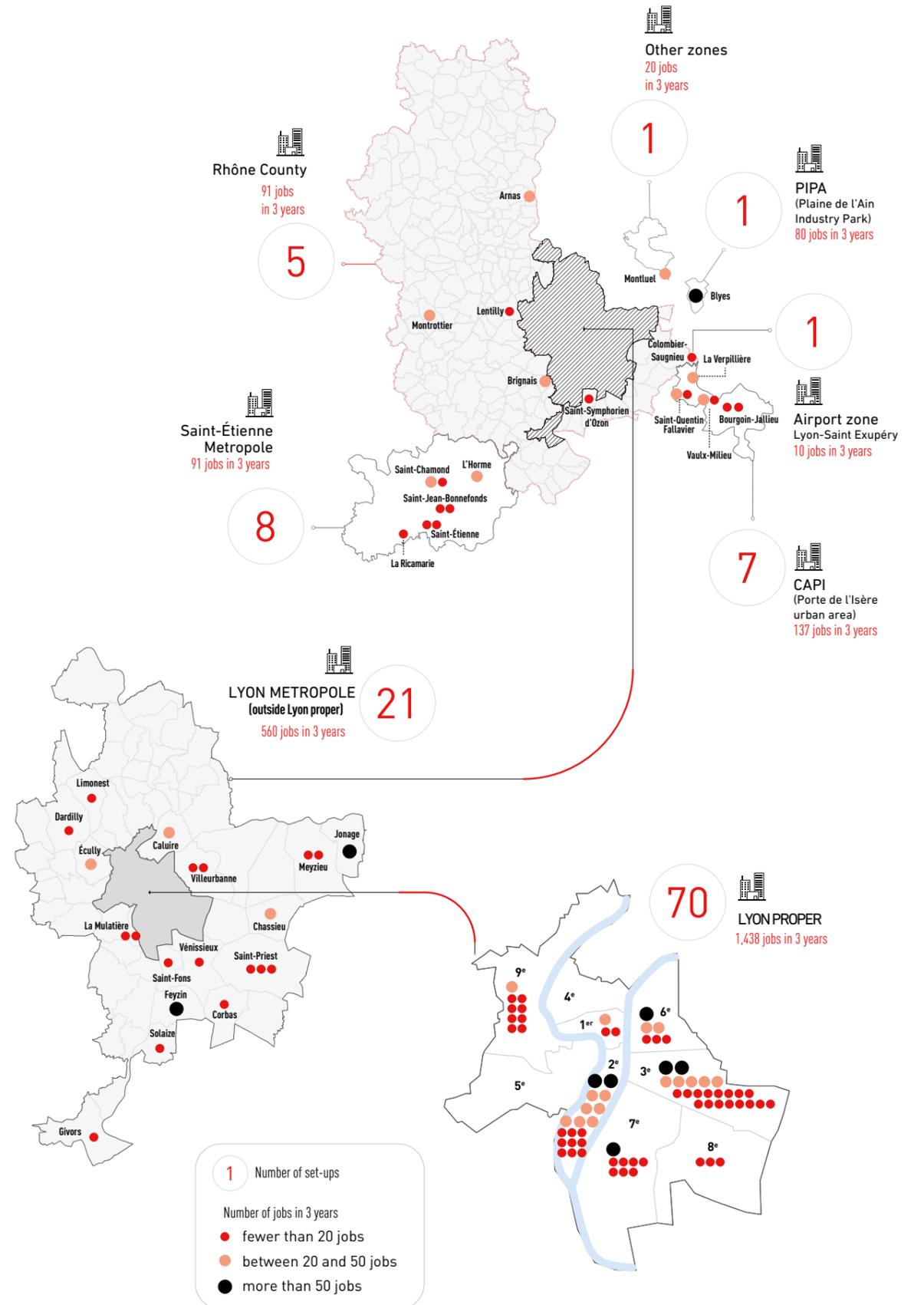
SETUPS



TYPES OF PROJECTS



LOCATIONS WHERE COMPANIES SET UP



COMPANIES SET UP IN 2019

LIFE SCIENCES 18 COMPANIES / 298 JOBS

| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|-------------------------|-----------------------------------------------------------------------|----------------------------------|-------------------|-----------------|
| AGATHALIFE | Clinical data management for pharmaceutical companies and hospitals | R&D | Japan | 22 |
| ANICURA | Network of veterinary clinics | Support / Services | Sweden | 15 |
| BIOSENCY | Teletracking bracelets and solutions for chronic respiratory diseases | R&D | France | 9 |
| BOEHRINGER INGELHEIM | Vaccines for animal and human health | Support / Services | Germany | 50 |
| CELLINK | Bioinks and bioprinters for cell culture | Commercial | Sweden | 12 |
| DOWELL & YIDAI | Production and packaging of cosmetic masks | Production (Products & Services) | China | 80 |
| EUREKAM | Solutions for inspection of chemotherapeutic agents | Support / Services | France | 10 |
| HEPHAISTOS PHARMA | Biotech specialized in oncology and immunotherapy | R&D | France | 12 |
| HITACHI MEDICAL SYSTEMS | AI solutions for medical imaging | R&D | Japan | 5 |
| IEC | Clinical test center for dermocosmetology | R&D | France | 8 |
| KARETIS | Management, innovation and data science consultancy | Sales | France | 5 |
| LABORATOIRE FEMMEILLEUR | Plant-based food supplements | R&D | China | 10 |
| NGI GROUP | Engineering for medical imaging centers | Support / Services | France | 4 |
| RTI HEALTH SOLUTIONS | Consulting for pharmaceutical companies | Production (Products & Services) | United States | 10 |
| SENSELIA | Cosmetics and food supplements | Production (Products & Services) | France | 20 |
| THUASNE LAB | Orthopedic medical devices | R&D | France | 10 |
| TISSUE SOLUTIONS EUROPE | Human tissue samples for pharmaceutical and biotech R&D | Commercial | United Kingdom | 4 |
| TOPCON MEDICAL | Ophthalmology devices | Head Office | Japan | 12 |

CLEANTECHNOLOGIES 9 COMPANIES / 347 JOBS

| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|---------------------|----------------------------------------------------|----------------------------------|-------------------|-----------------|
| CONDORCHEM ENVITECH | Air and water treatment in industrial environments | Sales | Spain | 10 |
| DEMETER | Cleantech investment fund | Sales | France | 10 |
| DISTRAN | Smart gas leak detectors | Sales | Switzerland | 15 |
| EATON-MARTEK POWER | Standard and custom electricity conversion systems | Production (Products & Services) | United States | 30 |
| RTE | Electricity transport network management | R&D | France | 225 |
| SAVIOLA | Chipboard panels made from recycled materials | Logistics | Italy | 12 |
| SOLARCENTURY | Photovoltaic panels and solar farms | Sales | United Kingdom | 20 |
| SUNGROW POWER | Renewable energy and energy storage | Sales | China | 15 |
| TRYBA ENERGY | Photovoltaic solar power plants | Production (Products & Services) | France | 10 |

INDUSTRY 21 COMPANIES / 504 JOBS

| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|-----------------------------|---------------------------------------------------------------------|----------------------------------|-------------------|-----------------|
| ACORN STAIRLIFTS | Stairlifts for the home | Logistics | United Kingdom | 30 |
| BECK & POLLITZER | Engineering for assembly and transfer of industrial machinery | Production (Products & Services) | United Kingdom | 9 |
| BJORN THORSEN | Distribution of raw materials for chemicals and plastics | Head Office | Denmark | 10 |
| BRISACH DESIGN | Wood stoves, fireplaces, inserts and chimneys | Production (Products & Services) | Italy | 20 |
| DELTA EQUIPEMENT | Motorised scaffolding | Production (Products & Services) | France | 5 |
| EUROCHILLER | Energy-efficient chillers and heat regulators | Production (Products & Services) | Sweden | 8 |
| FINI GOLOSINAS | Marshmallow, licorice and candy confectioner | Sales | Spain | 12 |
| HERA AERO | Surface treatment, painting and NDT on metallic and composite parts | Production (Products & Services) | France | 20 |
| HPS INTERNATIONAL - ACIM | Industrial-grade jacks | Production (Products & Services) | France | 22 |
| JULIUS MEINL | Coffee and tea for the hospitality industry | Sales | Austria | 25 |
| KILONEWTON | Contactless vibration testing and dynamic measurement | Head Office | France | 8 |
| KONECRANES DATA SCIENCE LAB | Port cranes and lifting devices | R&D | Finland | 60 |
| NALOD'S | Gardening-oriented agricultural cooperative | Support / Services | France | 10 |
| NEMERA | Drug delivery systems | Production (Products & Services) | United Kingdom | 50 |
| PCAS GROUPE SEQUENS | Fine chemistry for pharmaceuticals, perfumes and cosmetology | Support / Services | France | 30 |
| ROUNDB CONSEIL & INGENIERIE | Installation and maintenance of optical fibres | Sales | Portugal | 30 |
| SAFRAN | Aircraft braking solutions | Production (Products & Services) | France | 100 |
| SOBEN | Industrial and urban logistics droids | Production (Products & Services) | France | 22 |
| SW | Multi-spindle machine tools | Support / Services | Germany | 20 |
| WAEZHOLZ | Steel plates and profiles | Sales | Germany | 10 |
| YAMATO TEA | Organic foods and beverages | Sales | Japan | 3 |



“ Condorchem Envitech is a Spanish company specialised in the design and construction of “turnkey” solutions for water treatment, industrial air and waste recovery. In 2019, we chose to open the R&D centre and our sales office in Lyon to meet the demands of our local customers. Having already lived in Lyon for 10 years, I always wanted to come back to live here, in particular to take advantage of the dynamic industrial ecosystem, as well as for the quality of life the city offers!

Daniel Vildoza, General Director at Condorchem

COMPANIES SET UP IN 2019 (CONTINUED)

DIGITAL 19 COMPANIES / 591 JOBS

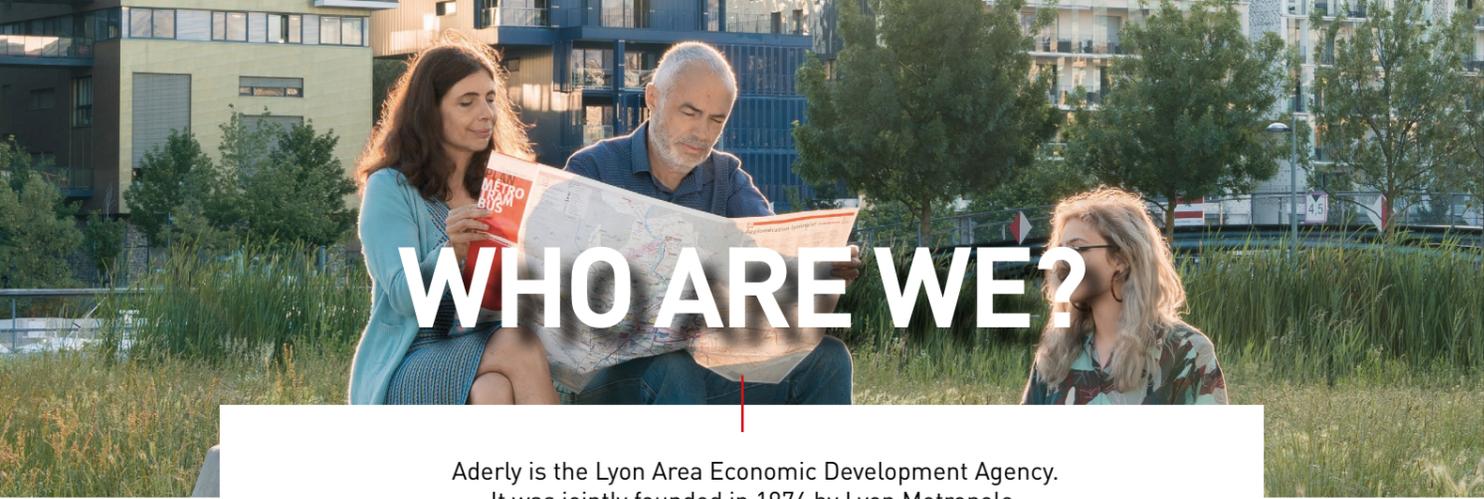
| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|--------------------|----------------------------------------------------------------|----------------------------------|-------------------|-----------------|
| CADFEM | CAD & CAE software for mechanical engineering and mechatronics | Sales | Germany | 12 |
| CONNECTION EVENTS | Video game and visual effect publishing | Production (Products & Services) | China | 20 |
| EKOSYSTEM | IT recruitment | Support / Services | Canada | 5 |
| FORMIND | Cybersecurity and risk management consultancy | Production (Products & Services) | France | 30 |
| GFI LAB | Digital business transformation | R&D | France | 15 |
| HUBWARE | Chatbots for customer interfaces | Production (Products & Services) | France | 8 |
| ICT ROOM | Data center architects | Production (Products & Services) | Netherlands | 6 |
| KAIBEE | Digital services | Sales | France | 40 |
| KHUNDAR | YouTube science, high tech and culture channel | Production (Products & Services) | France | 15 |
| LX SOLUTIONS PTY | Design of smart electronic objects for télécoms and industry | Sales | Australia | 10 |
| MULTIPLICA | UX Design and specialized talent recruitment | Production (Products & Services) | Spain | 15 |
| NAITWAYS | Custom IT solutions | Head Office | France | 20 |
| OMNILOG | Digital services | Sales | France | 30 |
| ONEPOINT | Digital business transformation | Production (Products & Services) | France | 300 |
| PALO IT | Technological innovations and information systems | Production (Products & Services) | France | 30 |
| RECONNECT | Document scanning and SSE cloud | Production (Products & Services) | France | 5 |
| SYNKATORY | Customer management solutions for industrial firms | Production (Products & Services) | France | 10 |
| THE CODING MACHINE | Development of technical mobile apps | Production (Products & Services) | France | 10 |
| VR INITIATIVE | VR to highlight industries with staffing difficulties | Sales | France | 10 |

SERVICES 47 COMPANIES / 687 JOBS

| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|-----------------|---------------------------------------------------------------------------------|----------------------------------|-------------------|-----------------|
| ACTIGLASS | Automobile windows | Sales | France | 8 |
| ALPES CONTRÔLES | Compliance assessment | Support / Services | France | 12 |
| ASSTRA | Logistics and transport solutions | Sales | Switzerland | 20 |
| AXIALEASE | Rentals of IT equipment, vehicles and medical devices | Production (Products & Services) | France | 10 |
| BIMBAMJOB | Hiring platform for unskilled positions | Production (Products & Services) | France | 10 |
| CAMEO | Training by AFEST. Sending employees of large groups to innovative companies | Production (Products & Services) | France | 10 |
| CAPEB | Confederation of Craftsmen and Small Construction Companies | Support / Services | France | 5 |
| CIMI - CIFOP | Industrial maintenance training | Support / Services | France | 4 |

SERVICES (CONTINUED)

| COMPANY NAME | ACTIVITY OF HEAD OFFICE | ACTIVITY OF SETUP | ORIGIN OF CAPITAL | JOBS IN 3 YEARS |
|-----------------------------------|--------------------------------------------------------------------------|----------------------------------|-------------------|-----------------|
| COLTRAX CP DISTRIBUTION | Premium machines for public works | Head Office | France | 20 |
| CONSULAT GÉNÉRAL DE CÔTE D'IVOIRE | Consular services | Production (Products & Services) | Ivory Coast | 13 |
| CORECYCLAGE | Circular economy startup specialised in reuse of furniture and equipment | Production (Products & Services) | France | 10 |
| COZYNERGY | Energy renovation | Production (Products & Services) | France | 7 |
| DAHLIR | Support for the disabled in leisure activities | Production (Products & Services) | France | 5 |
| ENERSHIP | Engineering to make industrial firms more energy efficient | Head Office | France | 15 |
| ENTERPRISE IRELAND | Support to develop exports and investment | Sales | Ireland | 5 |
| EPM GAS TECHNOLOGY | Industrial compressor maintenance | Support / Services | Spain | 8 |
| EQUIPVAN | Equipment for professional vehicles | Head Office | France | 12 |
| FRELLO | Digital content creation for French language learning | Sales | France | 22 |
| G&G | Chartered and Cost Analysis Accounting services | Head Office | France | 5 |
| GEOS | Construction material analysis and surveying laboratory | Production (Products & Services) | Belgium | 12 |
| GROUPE GA | Design and construction of industrial and tertiary buildings | Head Office | France | 5 |
| HONOR | Network and telecoms equipment | Sales | China | 10 |
| HUMAN DESIGN GROUP | Ergonomy and UX | Production (Products & Services) | France | 10 |
| I-CARE | Vibration analysis and predictive maintenance for industrial devices | Sales | Belgium | 12 |
| JAGGAER | Spend Management optimisation and outsourcing (purchasing, supply chain) | Production (Products & Services) | United States | 25 |
| JOBIRL | Job orientation platform for 14 to 25 year-olds | Production (Products & Services) | France | 3 |
| KILOUTOU ENERGIE | Generators and pumping equipment | Support / Services | France | 10 |
| LES CAUSANTES | Growth marketing agency for startups | Support / Services | France | 17 |
| LIBERKEYS | Real estate transaction solutions | Sales | France | 20 |
| LR TECHNOLOGIE | Digital consultancy | Production (Products & Services) | France | 60 |
| MADE.COM | Designer furniture and decoration e-commerce | Sales | United Kingdom | 8 |
| MALTEM | Digital services | Sales | France | 40 |
| MASTERIS | Engineering firm for railway maintenance | Production (Products & Services) | France | 5 |
| MOMÂTRE | Arts & culture education for youths | Production (Products & Services) | France | 3 |
| NGD HOOPLA | On-demand express delivery service | Head Office | France | 10 |
| PLATEAU URBAIN | Temporary urban office space for the tertiary sector | Production (Products & Services) | France | 3 |
| PREMIER CAFÉ BRÉSIL | Premium Brazilian coffee | Sales | Brazil | 4 |
| PRISMEA | Neobank for independent professionals | Sales | France | 83 |
| ROOFTOP | Digital communication agency for international organisations | Sales | South Africa | 11 |
| SAVINO DEL BENE | Air & sea transport and logistics support services | Logistics | Italy | 10 |
| SENERGY TECHNICAL SERVICES | Quality control of renewable energy devices | Support / Services | China | 10 |
| SYNVANCE | SAP software and systems | Support / Services | France | 50 |
| TANK YOU | Fuel delivery for professionals and consumers | Sales | France | 10 |
| TRANSUNIVERSE | Transport broker | Logistics | Belgium | 10 |
| VERT CHEZ VOUS | Last-mile urban delivery | Logistics | France | 15 |
| VINTAGE RIDES | Motorcycle adventure travel agency | Head Office | France | 25 |
| WAKE UP CAFÉ | Sustainable job market re-entry for former inmates | Production (Products & Services) | France | 5 |



WHO ARE WE?

Aderly is the Lyon Area Economic Development Agency. It was jointly founded in 1974 by Lyon Métropole, the Lyon Métropole Saint-Étienne Roanne CCI, the Rhône General Council and MEDEF Lyon-Rhône. The Agency is co-chaired by the President of Lyon Métropole and the President of the Lyon Métropole Saint-Étienne Roanne CCI.

OUR MISSIONS



Promote



Prospect, detect, convince



Set up and support

PROMOTING THE LYON AREA, PROSPECTING AND SETTING UP COMPANIES

with new investments that create both value and jobs.

OUR MEMBERS

BOARD OF DIRECTORS



MEMBERS AND CORRESPONDENTS



CLOSEUP

Aderly, a sustainable Agency!

In 2015, Aderly became the 1st economic development agency to obtain the LUCIE Label for its commitment to sustainable development and CSR.



RENEWS LUCIE LABEL IN 2019

The Agency's LUCIE label has been renewed until March 2021, following an audit by the mid-term evaluation committee.

"On behalf of the LUCIE Community and all of its partners, we congratulate you and your employees for your achievements, and we encourage you to continue working so that all of your commitments are fully met within the next 18 months."

NEW MEMBER OF GLOBAL COMPACT NETWORK

In early 2020, Aderly took its international sustainable investment strategy a step further by joining the United Nations Global Compact, a movement that unites over 10,000 companies, institutions, associations and communities in some 170 countries to address societal challenges and sustainable development.

This decision is a powerful statement guiding the territory and its actors towards a more reasoned, sustainable, enduring and inclusive economic development.

SIGNATORY OF LYON METROPOLE'S REGIONAL CLIMATE ENERGY PLAN

Aderly is taking part in this initiative in order to be more responsible towards its region. Through this approach, the Agency also wishes to join forces with local private and public sector stakeholders with a view to meeting climate change objectives. Finally, it is committed to setting an example for its stakeholders to encourage them to join this initiative.

"Our Neighbourhoods Have Talent (NQT) is fortunate to have had Aderly among its partners since 2015, to support our community of highly qualified graduates in their search for long-term employment. The Agency's involvement has allowed 33 young people to be mentored, thus helping them to find long-term employment that is in line with their skills more quickly. Our two organisations share the same values when it comes to developing an economy based on talent, such as our college graduates who need guidance, which is both precious and fundamental to strengthening Lyon's economy. With its 9 mentors, and thanks to its unique position in our region's international industrial and entrepreneurial ecosystem, Aderly helps to open these young people's eyes while giving them the opportunity to enter the world of work. The kindness and understanding shown by the Agency's mentors are truly valuable, and tomorrow, the talents from our neighbourhoods will become ambassadors for the region."

Émeline Chasterie, Regional Representative, NQT



SSE

Since 2018, Aderly has been a partner in the setup of Ronalpia, in order to help social entrepreneurs get established and spin off new initiatives in the Lyon area.



PLATEAU URBAIN GIVES YOUNG ENTREPRENEURS A HAND TO HELP THEM THRIVE IN LYON

Founded in 2013, Plateau Urbain defines itself as a "transitional urban planning cooperative". The company provides companies, artists, nonprofits, stakeholders in the social and solidarity economy (SSE) and others with temporary premises at reduced prices in buildings that are awaiting renovation projects. **This "recycling of buildings" is a win-win situation:** the building's owner can "wipe out" the frequently understated costs of leaving the premises unoccupied, while tenants enjoy the opportunity to grow at a lower cost, in a favourable setting.

Aderly supported Plateau Urbain by creating a network for the company within Lyon's SSE ecosystem, by putting it in touch with local real estate agents and by helping it find companies potentially seeking temporary premises.

WAKE UP CAFÉ OPENS IN LYON TO HELP FORMER INMATES

Founded in 2014, the Wake Up Café (WKF) association supports former inmates to help them become a part of society for the long term and to avoid falling back into crime. The nonprofit works with professional re-entry and probation departments to give former inmates the drive to move forward and to help those who ask for support when released from prison. When an inmate is released, the association calls upon its partners to provide tailored individual support for as long as necessary in order to deal with all of the problems of post-penitentiary life (housing, employment, medical care, etc.). Thanks to the recognition of the social and solidarity economy sector and, in particular, to support from the La France S'engage Foundation, **Wake Up Café opened its first Lyon branch in April 2019.**

Aderly supported WKF in its search for real estate and funding when setting up in Lyon, as well as in the creation of a local network, by putting the nonprofit in touch with the metropolitan area's companies and key stakeholders.

WHO ARE WE?

OUR SERVICES

REAL ESTATE SOLUTIONS

Finding premises and land, organising visits of facilities, engineering assistance and energy assessments.

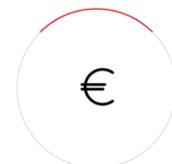
Contacts with local real estate players: agencies, co-working spaces, incubators and business centres.



FUNDING & AID

Identifying potential funding: aid, investment funds.

Contacts with BPI and other organisations.



BUSINESS & PARTNERSHIPS

Economic data, market overview.

Contacts with business networks, innovation clusters, R&D partners and laboratories.



LEGAL & FISCAL

Administrative procedures.

Contacts with legal and tax advisers, accountants and banks.



CLUB INVEST IN, COMMUNICATION & NETWORKS

Integration with implanted community

Post-implantation communication
Connection to the ONLYLYON Ambassadors network

INVEST IN
ONLYLYON



EMPLOYEE MOBILITY

Housing, returns from expat missions, international schooling.

Presentation of the Lyon area's advantages and organisation of tours to promote the region.

HUMAN RESOURCES

Job data.
Help with recruitment.
Spousal employment.



CLOSEUP

2 of the Agency's high-value-added services!

Because human resources play a vital role in successfully setting up a business, Aderly continues to develop these services, focusing on people and their talents!



HUMAN RESOURCES

Recruiting for companies

93 setup projects receiving HR advice and recruitment support

372 HR missions including:

183 consultations and appointments

110 recruitments for 52 companies (including 83% international projects)

68 salary surveys

11 jobs for spouses

1 partnership with the Pôle Emploi job agency resulting in joint actions:

Alenvi: meeting with the Bollier Pôle Emploi job agency for this project to create 80 new jobs within 3 years, which enabled Alenvi to participate in the #versunmétier event. The aim? To promote professions with a shortage of manpower, by meeting directly with companies that are hiring.

Cameo: setup of an appointment with the Pôle Emploi Defense Mobility job agency. Thanks to their quick response, the Regional Employer Relations Coordinator was immediately involved. A meeting is to be held at the Military Office in Paris with 2 potential solutions - for military staff in the process of setting up a business and for soldiers remaining in the organisation. To be continued.



EMPLOYEE MOBILITY

Supporting mobility

53 mobility projects for 28 companies and 49 beneficiaries, including:

13 support in immigration procedures

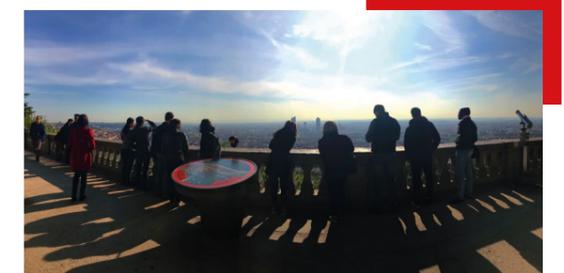
15 homes sought

24 other services

1 schooling project

4 operations to promote and convince: Topcon in Saint-Denis, Seqens in Longjumeau, Nexans in Lyon and JobTeaser in Paris.

RTE: mobility support with presentations in Paris, individual meetings on mobility and spousal employment, 2 outings to promote the city (guided tour with the Tourist Office, tour of the city and potential residential areas around the company facility, etc.) for 72 employees.



MEET OUR TEAM

MANAGEMENT & GENERAL SERVICES



JEAN-CHARLES FODDIS
Executive Director



BÉNÉDICTE DEVOLDER
Executive Assistant



AYMERIC DE MOLLERAT
Deputy Director



CORINNE CHIRAT
Chief Administrative Officer



AURÉLIE MAGNIN
Communications Manager

SECTORS



FRANÇOISE DIEHL
Sector Prospecting Manager



MARIE-LAURE ALONSO
Industrial Prospecting/Setup
Advisor



JULIE BERLIET
Digital Prospecting/Setup
Advisor



PERRINE CHAVANT
Services Prospecting/Setup
Advisor



FLORENT GERBAUD
Life Sciences Prospecting/Setup
Advisor



CORENTINE MAUGAT
Industrial Prospecting/Setup
Advisor

SERVICES



STÉPHANIE GROS
IT Systems and Reporting
Manager



CHRISTINE DESCHAUX
Purchasing and CSR Manager



ASTOU THIAM
Accounting and HR Assistant



CLAIRE MANHES
Mobility Advisor



MARIE-PIERRE GOTTWALD
HR Consultant



RECRUITMENT IN PROGRESS
HR Consultant

PARIS OFFICE



SANDRA TISUN-LEPINOY
Industrial Prospecting/Setup
Advisor



ADRIANA C. TOMA
Life Sciences Prospecting/
Setup Advisor



CAMILLE DURAND
Paris Office Manager



ADRIEN CATTIN
Industrial Prospecting/Setup
Advisor



AMÉLIE DEBUCHY
Setup Advisor



MARIE JACQUARD
Digital Prospecting/Setup
Advisor

FUTURE TRENDS & INNOVATION



CÉDRIC GRIGNARD
Head of Future Trends &
Innovation



RÉMY CHEVRIER
Setup Manager



DANIELLE GUDEFIN
Setup Advisor



MARGAUX ROSIER
Commercial Real Estate Advisor



SÉBASTIEN BRASIER
Financial Engineering & Setup
Advisor

SETUPS



EMMANUELLE SYSOYEV
ONLYLYON Program
Coordinator



GÉRARD AUBOEUF
Private Partnerships
Manager



KRISTIN MANGOLD
International Networks
Manager



SONIA DHAOIDI
Resources & Skyroom
Manager



MALIKA KHERKHACHE
International Events
Manager

ONLYLYON

PARTNER REGIONS



ÉMILY MOREY
Prospecting/Setup Advisor,
West Lyon



MYLÈNE RICHARD
Prospecting/Setup Advisor,
Saint-Étienne Metropolitan Area



FRÉDÉRIC MIRIBEL
Head of International Prospecting
& Asia Office



ARMELLE GROS
Setup Advisor



WEINA GRAND
Prospecting/Setup Advisor,
China



YUKIKO VINCENT
Prospecting/Setup Advisor,
Japan

INTERNATIONAL OFFICE



PAUL MALINIC
Community Manager



MARION MOREL
Media Relations Manager



COLIN PEZZANI
Community Manager

ADERLY AND ONLYLYON RESOURCES

2019 BUDGET

ADERLY REVENUES IN K€

| | |
|-----------------------------------------|--------------|
| LYON METROPOLE | 2,258 |
| LYON METROPOLE SAINT-ÉTIENNE ROANNE CCI | 1,640 |
| WEST LYON EPCI | 134 |
| SAINT-ÉTIENNE METROPOLITAN AREA | 100 |
| CAPI | 50 |
| PLAINE DE L'AIN | 25 |
| OTHER AREAS | 15 |
| MEDEF LYON-RHÔNE | 25 |
| UNIVERSITY OF LYON | 20 |
| OTHER PARTNERS | 17 |
| TOTAL | 4,284 |

ADERLY EXPENSES IN K€

| | |
|------------------------------|--------------|
| PROSPECTING | 2,144 |
| REGIONAL DEVELOPMENT | 200 |
| PROJECT SUPPORT | 556 |
| INNOVATION AND FUTURE TRENDS | 140 |
| TRADE AND DIGITAL PROMOTION | 270 |
| SUPPORT SERVICES | 974 |
| TOTAL | 4,284 |

ONLYLYON REVENUES IN K€

| | |
|-----------------------------------------|--------------|
| LYON METROPOLE | 1,315 |
| LYON METROPOLE SAINT-ÉTIENNE ROANNE CCI | 215 |
| PRIVATE PARTNERSHIPS | 300 |
| OTHERS | 120 |
| TOTAL | 1,950 |

ONLYLYON EXPENSES IN K€

| | |
|--------------------------|--------------|
| COMMUNICATION | 512 |
| SOCIAL MEDIA | 252 |
| PRESS & PUBLIC RELATIONS | 280 |
| INTERNATIONAL NETWORKS | 303 |
| OUTREACH & PARTNERSHIPS | 300 |
| PROJECT SUPPORT | 303 |
| TOTAL | 1,950 |

FUNCTIONAL ORGANIZATION CHART

AS OF 31 JANUARY 2020

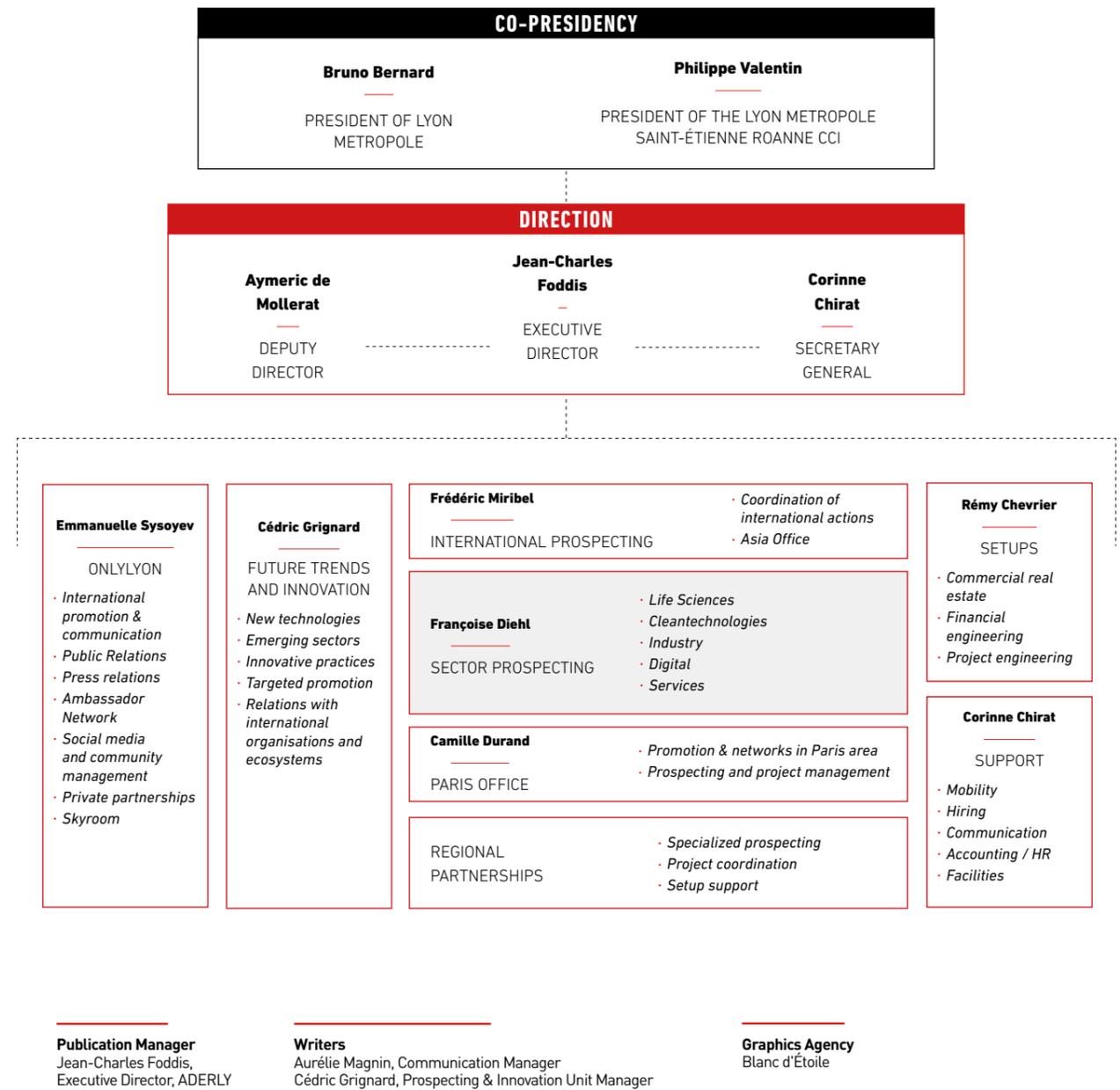


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INVEST IN |
ONLY LYON 

ADERLY
INVEST IN LYON

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