



Annual report
2023



• Lisa

5vies



« Naître une seconde fois »

Passionnée par son métier, elle suit son chemin vers l'excellence. Découvrez son histoire, made in Lyon.*

**ONLY
LYON**

Agir ici. Changer demain.

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What was the most significant moment for you in 2023?

The Octopod launch workshop, with a hundred or so partners getting together to talk about the tensions we all face personally, but also our structures and society. These are all issues we need to address together...

It wasn't a foregone conclusion that we'd get on the same page, but it was clearly a wake-up call that helped us to move forward with the project.

Which challenge motivates you most?

Clearly, the human challenge. Recreating a team that is committed to and trained in the new and increasingly complex challenges facing our businesses, opening up our governance and partnerships, reinforcing our inclusive approach to disadvantaged groups and attracting specific talents to our region: all of this is, above all, an exciting human adventure! I'm personally convinced that it's through the commitment of men and women, before structures, that things can change.

What concerns you most?

The growing scarcity of water resources, raw materials, land... In addition to decarbonization, the strain on resources is perhaps an even greater challenge, because it cannot be measured solely in terms of tons of carbon emitted, and it has an even greater impact on the way we produce and consume.

Much remains to be done in this area: we are probably one of the most exposed regions in

France on the subject, but also a leader in the circular industry, if the number of projects we have in our portfolio on the subject is anything to go by.

Your main source of inspiration?

The work and colleagues of the Convention des Entreprises pour le Climat (CEC). I took part in the Class of 2023, in parallel with the transformation plan initiated at Aderly.

Meeting these experts, sharing our doubts with some sixty inspiring and committed entrepreneurs, being guided by a methodology that was disruptive to say the least... It changed me profoundly.

Your main objective for 2024?

To finalize the Agency's ongoing transformation, in line with our new raison d'être. There are still a number of major levers to work on, such as impact measurement, priority sectors that still need to be fine-tuned, and talent with the regional employer brand... in an economic

context that is under severe pressure in certain sectors, and one of general uncertainty.

We must not forget that we are at the service of investors and entrepreneurs, who themselves take a great deal of risk, and that we must be effective alongside them, while remaining very humble about our actions. Above all, it is they who are building tomorrow's economy.

"I'm personally convinced that it's through the commitment of men and women, before that of structures, that things can change."



He took over the general management of the institution almost 2 years ago to implement a transformation plan. On the occasion of the structure's 50th anniversary, this evolution takes a special dimension. Let's talk!

Interview with Bertrand Foucher

Managing Director of Aderly



*Bruno Bernard (left) and Philippe Valentin (right), at ONLYLYON's 15th anniversary party (October 2022).
©DreamArtMedia*

Crossed views

Bruno Bernard, President of the Metropole de Lyon, and Philippe Valentin, President of the CCI Lyon Métropole Saint-Étienne Roanne, are also co-presidents of Aderly. Their shared vision of Aderly's development provides a strategic outlook.

This year, Aderly celebrates its 50th anniversary in the service of the region's economic development and influence. What do you consider to be Aderly's main asset?

Bruno Bernard (BB) Its openness, both in terms of its very diverse membership of territories and economic institutions, but also its openness to the world with the ONLYLYON program, which raises the profile of the region, and the many partnerships the agency maintains with its European counterparts. It's an agency that embodies the region's international cooperation and openness.

Philippe Valentin (PV) Its agility and pioneering stance have remained unchanged over the past 50 years! The business, the issues and the world have changed a great deal since 1974, and Aderly has always stayed the course, anticipating major economic trends to enable the region to stay one step ahead in terms of sectors, research, economic and social practices, as well as in its mission to attract companies and talent. It's an invaluable tool.

In 2023, Aderly was committed to a transformation plan designed to adapt the agency's roadmap to new economic, environmental and social challenges. What do you see as the most emblematic aspect of this ongoing evolution?

(PV) Once again, our agency has been a pioneer in raising awareness of the changes we need to make, and in finding the way forward. The collective intelligence of a hundred or so of the region's economic, political and academic players has made it possible to adjust the agency's course for the coming years, in an original and collaborative approach called Octopod. The idea is to adapt our attractiveness to the challenges of business and regional transformation dictated by global change: climate, energy, environment, human resources,

etc. As Olivier Hamant, Director of Research at the CNRS, has advocated, Aderly must pave the way for the region's economic robustness.

(BB) Seeing the Economic Development Agency as a force for embarkation on the issues of impact, resources, environmental responsibility and inclusion is necessarily very satisfying. Aderly is the embodiment of the Lyon model, where economy and environmental responsibility, influence and inclusion are not opposed. Aderly's ability to build a territory out of a diverse, complex space, to carry out this ambition, is a great support to the issues raised by the Metropole and its partners.

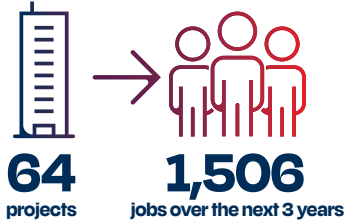
What are your main expectations for Aderly in 2024?

(BB) That Aderly will continue to unite around impact issues. And that it can increase its role in inclusion through employment by providing specific support to the companies it sets up. This economic and social balance is just as important as the environmental issue.

(PV) May it continue to shine after its 50th anniversary! Our ability to inspire and attract is one of the keys to our harmonious development and economic robustness!

ONLYLYON Invest, a look back at 2023

In figures



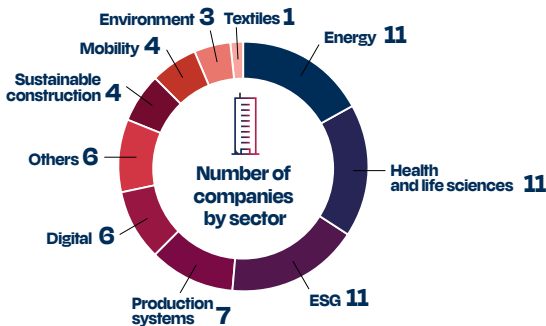
In 2023, ONLYLYON Invest's results **confirm both the attractiveness of the Lyon metropolitan area and its impact strategy.**

In fact, the agency has set up 64 companies in the Lyon region, which will generate the creation of 1,506 jobs within 3 years.

GEOGRAPHICAL ORIGIN OF CAPITAL

Among these 64 projects, **the proportion of international projects (39%)** remains identical to trends in previous years, with the same issuing countries still in the lead.

Germany and Southern Europe remain the main investor areas.



BREAKDOWN OF PROJECTS AND JOBS BY SECTOR

Naturally, the projects we prospect and support are in line with **the priority sectors of the region**, which they reinforce, with the 3 main sectors at the top of the list: **health and life sciences, energy and services with an impact and the ESG.**

70% OF PROJECTS HAVE IMPACT(S)

In 2023, the Agency pursued its **impact strategy**, with 70% of projects having at least one impact in addition to their economic impact. This result testifies to the region's ability to link reindustrialization and sovereignty with social and environmental issues.

This focus will continue in 2019, making Aderly the only European economic development agency to concentrate its action on companies responding to one of the following **5 impacts**.



Environmental



Social



Cooperation



Productive



Territorial

Focus on business services

The Agency offers companies a range of services to support them at every stage of their projects: relocation, human resources (salary quotations, recruitment assistance, etc.), employee mobility (impatriation, housing, schooling, etc.), financing, corporate real estate (site searches and visits), etc.

145 REQUESTS ABOUT HUMAN RESOURCES

23 EMPLOYEE MOBILITY REQUESTS

82 ASSISTANCE SERVICES IN FINANCING

127 REAL ESTATE SOLUTIONS

238 PROJECTS IN PORTFOLIO

By the end of 2023, Aderly's project portfolio totaled 238 companies. These projects are **monitored and supported** by Aderly's location experts, to help them set up in the Lyon region.



They choose the Lyon region in 2023

Energy

Health and life sciences

Impact services and SSE

Production systems

Digital

Others

Sustainable construction

Mobility

Environment

Textiles



What companies say!

Among the 64 companies we supported in 2023, we have selected 10 projects representing the different business sectors targeted by Aderly. Discover the companies that have chosen our region!



Nouvelles Fibres Textiles

France - Located in Amplepuis - 12 jobs within 3 years - Textile industry

France's first industrial pilot for automated sorting and untying of end-of-life textiles. Les Tissages de Charlieu and Synergies TLC have joined forces to create Nouvelles Fibres Textiles, an innovative automated textile sorting process by composition and color, whose first line combines industrial-scale operations and R&D activities.

"The textile industry is emblematic of all the excesses of our over-consumption. One of the most effective responses, ecologically, economically and humanely, is the circular economy: because it is local (the material is transformed and generates work as close as possible to the place of consumption), it generates employment, sovereignty and pride, while saving resources.

But the extraordinary variety of textiles is holding back large-scale deployment. With Nouvelles Fibres Textiles, this obstacle is lifted: textiles that can't be reused locally, once sorted by composition and color and unravelled (hard points removed: buttons, zippers, badges, etc.), can become raw materials exploitable by the many industrial sectors that use textile fiber. The job of all of us (citizens, local authorities, industrialists, brands, distributors) is to ensure that this sector becomes emblematic of an industry that does good for people and the planet, from producer to consumer". **Eric Boël, Chairman**



Phaxiam

France - Located in Lyon 8th district - 30 jobs within 3 years - Health and life sciences sector

Phaxiam (a company resulting from the merger of Lyon-based biotech Erytech and Pherecydes Pharma of Nantes) develops antibacterial treatments based on the use of bacteriophage viruses, or phages, to combat bacterial infections in humans, particularly those resistant to antibiotics.

In particular, the company was able to benefit from a mobility support program to convince its employees to relocate to the Lyon region.

Axens

France - Located in Lyon 7th district - 150 jobs within 3 years - Energy sector

"Axens is a subsidiary of IFP Énergies Nouvelles, which designs a complete range of solutions for the conversion of oil and biomass into cleaner fuels, the production and purification of the main petrochemical intermediates, the chemical recycling of plastics, all natural gas treatment and conversion options, water treatment and carbon capture and storage solutions.

The Axens Group is ideally positioned to cover the entire value chain to provide an integrated energy transition offer and a sustainable future. We have chosen to relocate part of our Parisian workforce to Lyon to offer a better quality of life to our employees, but also to develop our market in our new activities linked to environmental transition."

Frederic Kuntzburger, Director of Operational Excellence and Digital Transformation



Exotec

France - Located in Lyon 3rd district - 100 jobs within 3 years - Production systems sector

"We design goods-to-person robotic solutions for the logistics warehouses of the world's leading brands.

Lyon was chosen as the location for our new R&D laboratory because it represents a strategic point for the group, enabling us to consolidate our presence in France and continue to innovate, encouraged by the commitment of an entire region to reindustrialization."

Renaud Heitz, co-founder and CTO



CryptoLab

South Korea - Based in Lyon 3rd district - 5 jobs within 3 years - Digital sector

This start-up founded in 2017 specializes in homomorphic encryption technology.

Its application markets are data leakage protection in big data and artificial intelligence.

In 2023, it set up a cryptography R&D center in Lyon, considering that France has an advanced technological level in this field. Lyon was chosen thanks to the links forged with a teacher-researcher at ENS Lyon, who has since become CryptoLab's Scientific Director.

Akonovia

Canada - Located in Lyon 7th district - 30 jobs within 3 years - Sustainable construction sector

"Akonovia, an engineering company specializing in energy transition and carbon neutrality, has chosen to set up its French subsidiary in Lyon with the support of Aderly. This further strengthens the ties between Quebec and Lyon, as we were able to testify at Business France's most recent Club Canada event."

Guillaume Moreau, Regional Director



Ecole Gustave

France - Located in Villeurbanne - 7 jobs within 3 years - Sustainable construction sector

École Gustave is a social economy (SSE) organization set up to provide training in high-voltage craft and building trades. It offers free, remunerated training to apprentices aged between 18 and 50 years of age, recruited primarily on the basis of personality and motivation, rather than qualifications. 60% of applicants do not have a school-leaving certificate, and 25% are RSA recipients. In 2023, École Gustave opened a campus in Lyon, where two training courses are offered for plumber-heaters and electricians.

"The opening of this campus in Lyon is designed to offset the shortage of manpower and meet the strong demand from professionals in the region for these short-staffed trades. As a winner of the Ronalpia call for projects, we were able to benefit from their support on local spin-off issues, as well as that of Aderly on all aspects of real estate, relations with France Travail and MMIE, and contacts with the building and civil engineering ecosystem." **Marie Blaise, Director**



1432 (formerly RIIDE SAS)

France - Based in Villeurbanne - 150 jobs within 3 years - Mobility sector

1432 designs, manufactures and distributes components, sub-assemblies and customized solutions for bicycle manufacturers, creating a new local industrial force. Its aim is to enable urban cyclists to benefit from European bicycles incorporating local components. The company, to be set up in 2023, is a greenfield* industry in Lyon. It will move into its industrial site in 2024 and is structured to become an ETI in the medium term.

"We want to make 1432 the benchmark European bicycle equipment supplier. We firmly believe in our vision of innovative, sustainable, environmental and socially responsible industrial relocation."

Luc Larderet and Jean-Christophe Collet, co-founders



Maat Energy

USA - Located in Vénissieux - 10 jobs within 3 years - Energy sector

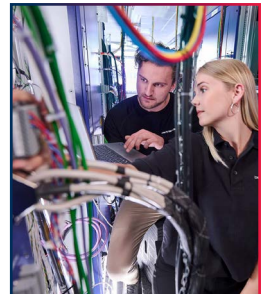
Maat Energy's aim is to produce low-cost, low-carbon hydrogen. Aderly helped the company set up its European development center in Lyon.

Support was provided in the search for financial solutions, as well as in the identification of local players to meet the company's needs and help it forge a partnership to develop its technology.

Groupe Bertrandt

Germany - Located in Villeurbanne - 50 jobs within 3 years - Services sector

For 50 years, the Bertrandt group has been providing development solutions for the automotive and aerospace industries, and more recently for the pharmaceutical industry. In order to be closer to its customers, the company decided to open a branch in the Lyon region, and benefited from the support of Aderly, particularly in the search for premises.



ONLYLYON makes a change

ONLYLYON's new dynamic is marked by the roll-out of its new strategic positioning, particularly among young professionals, and by the strong return of international action!

The new strategic positioning is deployed through **the 5 vies campaign**, season 1 of which was deployed on social networks, as well as through a media plan in France and internationally, in Lille, Paris, Marseille, Montreal and French-speaking Switzerland.

Since this year, the campaign has also been displayed on the Palais de la Bourse (CCI Lyon Métropole Saint-Étienne Roanne), on the rue de la République side (photo below). As for season 2, it is currently being filmed, with new inspiring personalities, and will be unveiled in the first half of 2024!



To reach out even more to young people and young professionals, ONLYLYON has added to its extensive presence on social networks (with a total of 3 million subscribers on all platforms) with the **launch of a TikTok ONLYLYON account**, which already has over 90,000 subscribers after 1 year of activation, and the reorientation of its ONLYLYON Ambassadors program.



The resurgence of international action is reflected in:

- **many joint missions:** in Frankfurt (June) for Eurobike, in Brussels and Lausanne (October) in partnership with ONLYLYON Tourisme et Congrès, in New York (May) for Frenchy Comedy Week, in Barcelona (November) for the Orchestre National de Lyon tour.
- the launch of **3 new Ambassadors communities:** in Lausanne, Barcelona and Frankfurt.
- **7 international events** around the Fête des Lumières (photo opposite) with Ambassador communities.



ACTING TOGETHER

The essence of the ONLYLYON program is to promote cooperation between players in the service of the region and its influence. The **ONLYLYON Academy** (photo below), an annual meeting of teams from the main partners (Métropole de Lyon, CCI Lyon Métropole Saint-Étienne Roanne, ONLYLYON Tourisme et Congrès and Aderly / ONLYLYON Invest), is an important moment for sharing and alignment. On November 30, the 2023 edition at Sciences Po's Public Factory focused on issues of cooperation and solidarity, with speeches by the co-chairmen and Xavier du Crest, President France of Handicap International, based in Lyon.





Bourg-en-Bresse ©Shutterstock

Transforming the organization



International development and cooperation

Inaugurations, press visits, trade shows in France and abroad, conferences, local events, cooperative workshops, etc. Here's a look back at the highlights of 2023!

TOGETHER WITH COMPANIES

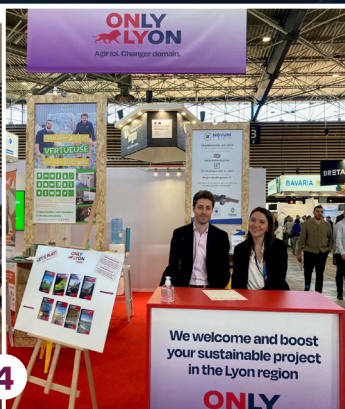
1. The Forvia group's **MateriAct** project to be based at La Doua in November 2023: a true co-construction approach serving an ecosystem. But also a real environmental turning point for this automotive equipment manufacturer: designing and testing tomorrow's materials in Lyon. As a result, Aderly won the UNCTAD (United Nations Conference on Trade and Development) ecological transition award.

2. **Press tour of the health and life sciences sector** in the Lyon region, organized by the Metropole de Lyon, in partnership with Aderly, on November 13 and 14.

3. Press visit to Japanese company **HORIBA**, which has set up its European hydrogen expertise center in Vénissieux. The sector's challenge is to offer solutions for decarbonization, mobility and industry.



1



4

PROMOTION AND PROSPECTING AT TRADE FAIRS

1. Two highlights at **MIPIM** in Cannes in March 2023: a round table with the Choose Europe collective and a conference organized with the economic development agencies of Lille, Marseille, Paris and Grenoble.

2. Aderly was present for the 1st time at **Slush** in Helsinki, alongside Business France and accompanied by H7.

3. A delegation from Lyon headed for Frankfurt in June to take part in **Eurobike**, an international trade show specializing in the bicycle industry.

4. 4 days of prospecting and visibility at the **Pollutec** trade show in Lyon in October, including a stand in our colors and events such as the mâchon lyonnais.

5. Experts from Métropole de Lyon and Aderly showcased the Lyon region's real estate offer and services at the **SIMI** (Salon de l'Immobilier d'Entreprise) in Paris.

6. Once again, Aderly was a partner of the **Pharmabiotics** business convention in Lyon, and our life sciences expert Florent Gerbaud presented the dynamism of local research and networks in the microbiome field.

7. **Collision** in Toronto: first event held under the Choose Europe banner, bringing together 14 European cities and regions involved in the initiative.





1

MULTIPLYING COLLABORATIONS

1. Nearly 100 industry players at the Lyon Metropole for the 2023 Business Meetings for the **food and agri-food industry**.
2. The **Rencontres de la Place** organized by Lyon Place Financière at EY highlighted Aderly's results in June.
3. Breakfast for members of the **VPH (Veterinary Public Health) Hub** on our region's expertise in phages and phage therapy.
4. Frédéric Miribel spoke at the CCI de la Région Auvergne-Rhône-Alpes conference on **ESG in the international arena**, organized by Lyon Place Financière: experience-sharing on issues and opportunities for companies.



2

MAINTAINING PARTNERSHIPS

5. **Territorial cooperation**: all of Aderly's member territories came together for a morning rich in exchanges, which enabled them to define together the actions to be taken to meet the needs of local authorities and strengthen the attractiveness of the Lyon region!
6. 150 people gathered at the Cité Internationale de la Gastronomie for the **Business France Rugby Club** organized in partnership with Business France and the Italian Chamber of Commerce for France in Lyon, on the occasion of the France-Italy Rugby World Cup match.



3

7. After 10 months of adventure with the **Convention des Entreprises pour le Climat - CEC** (Lyon area), Bertrand Foucher and Emmanuelle Sysoyev presented the Agency's roadmap, defining our course to 2030 and highlighting our commitments.



4



A concrete illustration of our cooperation with the Centre Léon Bérard in video.

“One of the fundamental elements of this collaboration is to put us in touch with international pharmaceutical companies developing innovative therapies. [...] Since 2008, Aderly has put us in touch with a large number of manufacturers, and we have launched four key partnerships in Japan in particular.”



Watch the full video

Octopod, a strategic plan to address major changes



What kind of attractiveness policy should be pursued in a context of increasing scarcity of land, human and water resources?

Are new sites compatible with European and local environmental guidelines?

Which markets and segments should we continue to target, given the geopolitical tensions weighing on economic activity?

→ These are all questions fraught with intrinsic tensions, which the renewed Aderly team set out to answer in 2023, in order to fine-tune its mission.

To move towards a convergent vision on these complex, sometimes sensitive issues, the choice fell on a methodological approach based on collective intelligence with an open, participative framework, supported by a group of designers (Codesign-It) and a sponsor group.

In all, **more than 300 partners** actively contributed to the strategic plan through the various project milestones:

8 INDIVIDUAL INTERVIEWS with the Agency's strategic partners, to hear their views and define priorities for reorientation.

A period of **CHANGE MANAGEMENT** to help teams and the organization pivot towards the deployment of new modes of intervention.

STRATEGIC WORKSHOPS to work on major issues: challenges, reasons for being, transformation pillars to be to address, etc.

A TESTING PHASE in three groups on the issues raised to verify their feasibility for the Agency.

AN INDUSTRY REVIEW with sector partners and the Board of Directors to specify the priority segments for each industry addressed by Aderly.

A phase of **SYNCHRONIZATION** and deployment of strategic changes by pillars (octopus page 26).



Partner workshop

A SOLID STRATEGIC FOUNDATION

Reaffirming the Agency's ambition and expertise, taking into account the new challenges it faces: this was the first strategic step:

→ Facing peril

Like other regions, the Lyon region is vulnerable to climate change, resource scarcity and threats to biodiversity. Added to this are geopolitical tensions, social inequalities and major societal changes. This context is conducive to withdrawal, personal and collective tensions, and generates economic uncertainties for businesses.

→ Vision: confirming the region's strengths

Our vision is of a Lyon region that fosters entrepreneurship and cooperation to regenerate and strengthen the region and its businesses, with the well-being of all its inhabitants in mind; that draws inspiration from best practices elsewhere, as much as it inspires with its capacity for innovation and its commitment to tackling the world's major challenges; that, to do so, can count on its humanist heritage, its entrepreneurs, its industries, its European stature and its tradition of working together.

→ Raison d'être: enriching our contributions

Strengthen the region's economic robustness and cooperation by attracting companies, solutions, skills and investments that reinforce strategic economic sectors.

→ Missions: reaffirming our public-interest vocation

We are a public-interest organization whose team is committed to economic cooperation and the development of the Lyon region, working with local, national, European and international players to identify, attract, support and connect companies, skills and technologically or socially innovative solutions that enrich the region by contributing to this vision.



Octopod Workshop #1 in April 2023 at Embarcadère



Octopod Workshop #1 in April 2023 at Embarcadère

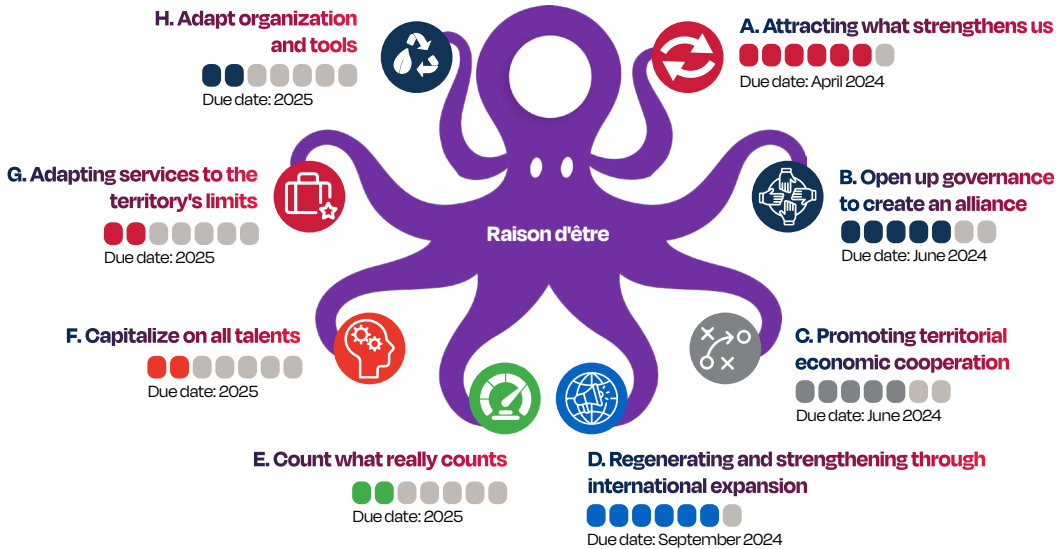


Octopod Workshop #2 in October 2023 at Boehringer Ingelheim

OCTOPOD: THE 2024/2025 COMPASS

The Octopod method and the various milestones of the strategic plan have enabled us to define 8 redirection projects, steered through the Octopod diagram, a veritable compass for transformation.

The first 4 are already well advanced and will be finalized in 2024, while the last 4 will be the subject of the 2025 action program.



Priority 1: Attracting what strengthens us - Focus on sectors

Faced with the perils set out in the strategic foundation and the difficulties encountered in supporting direct location projects in a context of land scarcity and fragile resources, it seems necessary to move towards selective attractiveness and to approach industry prospecting from the angle of the region's needs.

The industry review carried out between June and October 2023 enabled us to co-construct this new approach:

→ Redefine the boundaries of the prospecting sectors and specify the strategic segments within each of them: **health and life sciences, energy, mobility, production systems, chemicals and environment, sustainable construction, digital, impact services and SSE, textiles.**

→ Assert the stakes: ensure the region's robustness OR sovereignty,

→ Explain the choices: fill in vulnerabilities (missing links) OR strengthen sectors of excellence.

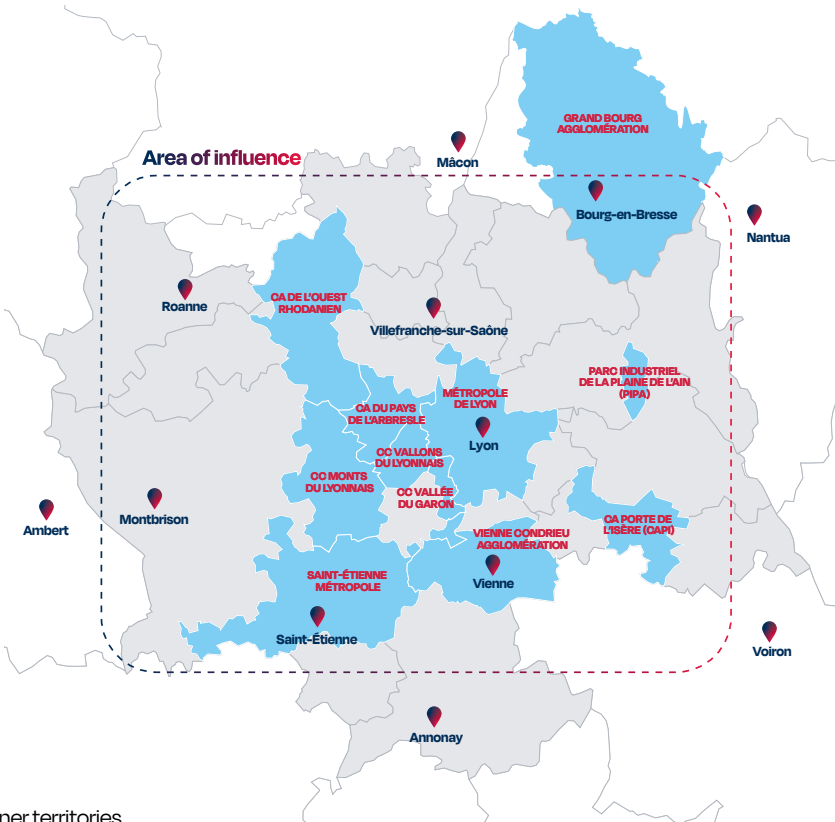
Priority 2: Promoting territorial economic cooperation - Focus on our partner territories

More than ever, cooperation between the metropolitan area and its adjacent territories is a necessity. The robustness of the Lyon region depends on balanced and concerted development, based on a logic of complementarity.

Aderty, which has historically been active in a wider area than the Lyon Métropole, corresponding to the Lyon urban area, intends to play its full part in this territorial economic cooperation.

The work carried out as part of Octopod, in conjunction with the various players involved, has already led to the launch of a new territorial strategy for Aderty:

- Integrate new territories to truly embody the “metropolitan square”, by including Saint-Étienne in particular, but also Bourg-en-Bresse;
- Giving territories a real place in the Agency's governance via a college bringing together all partner territories;
- By driving territorial economic cooperation based on the needs and constraints expressed, whether in terms of location, influence, etc.

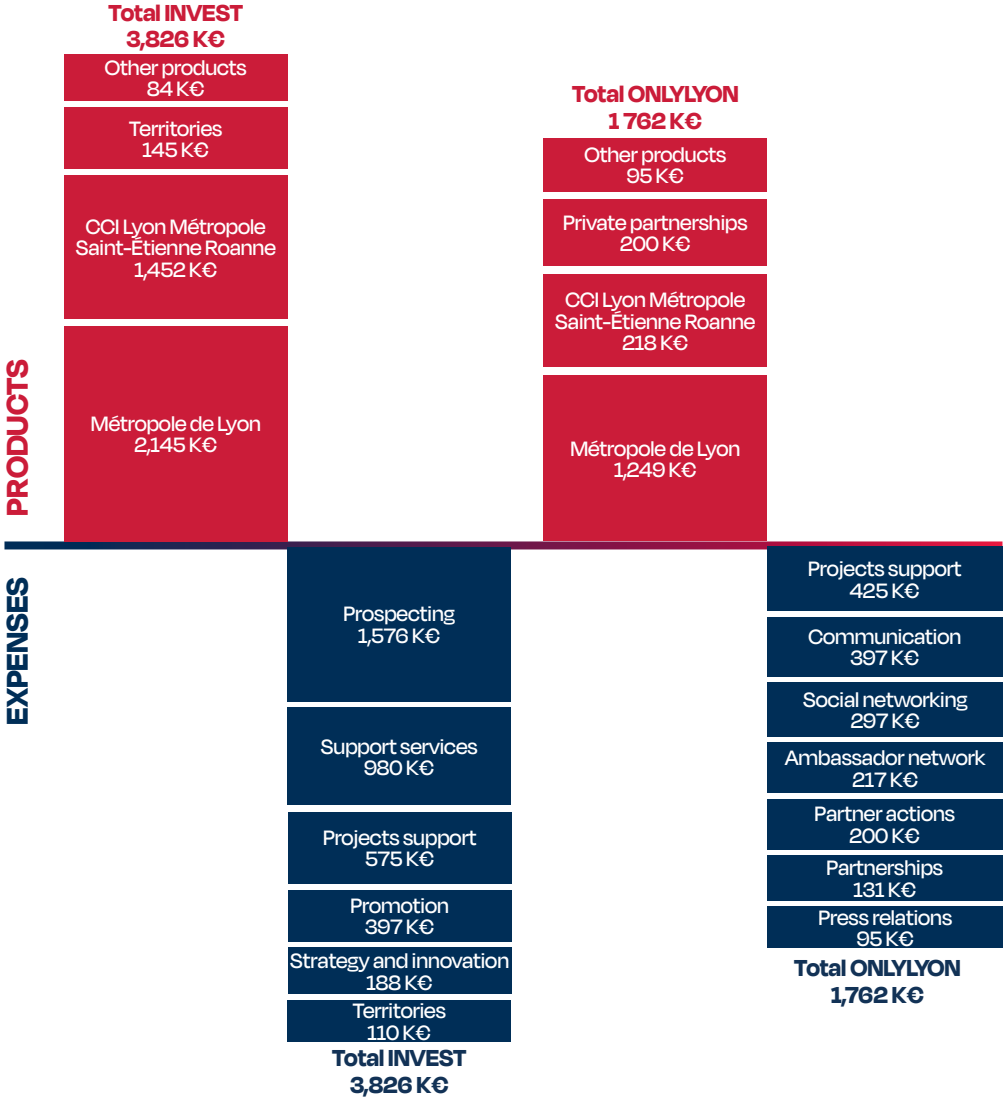


 Partner territories

Appendices

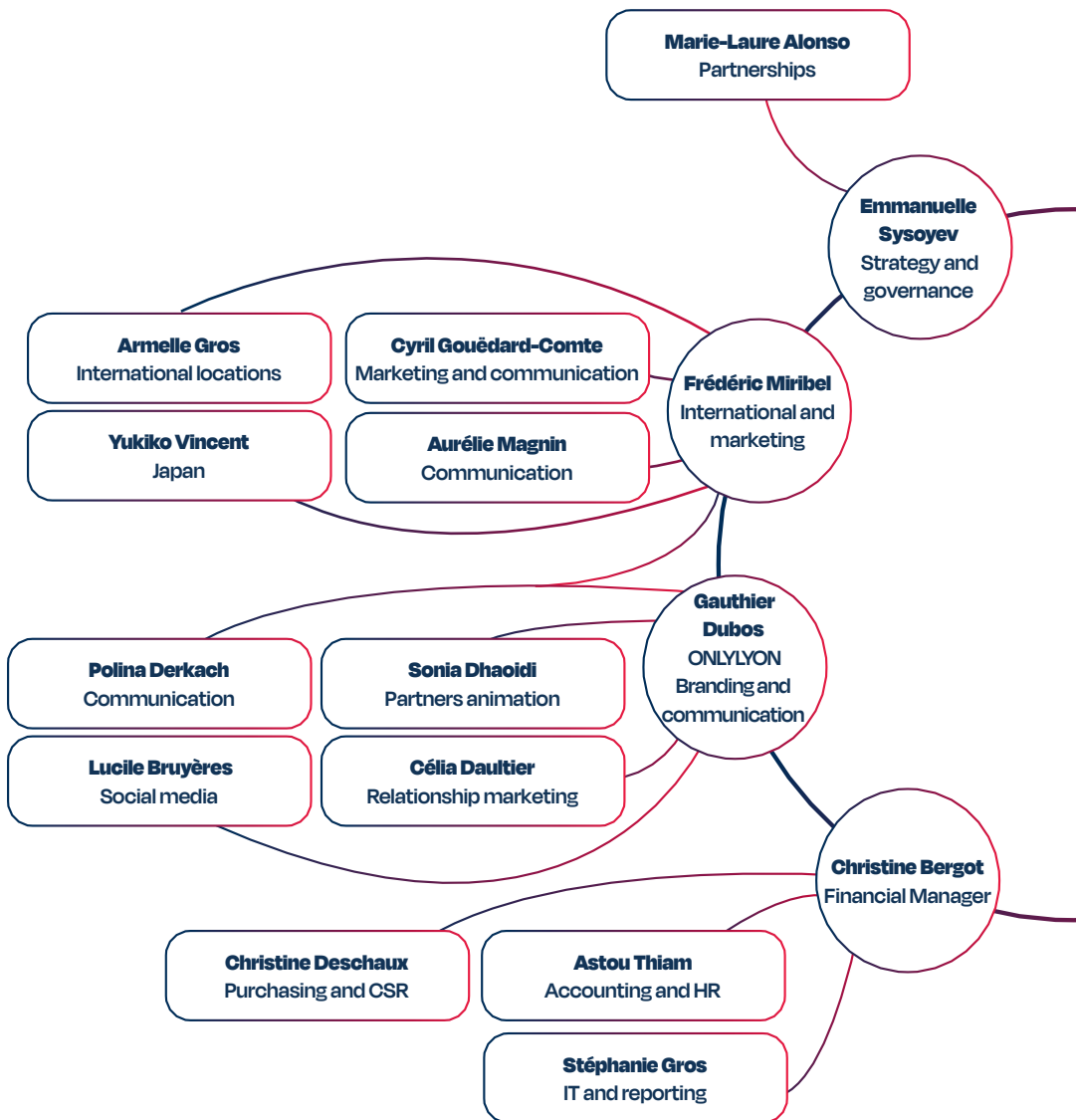


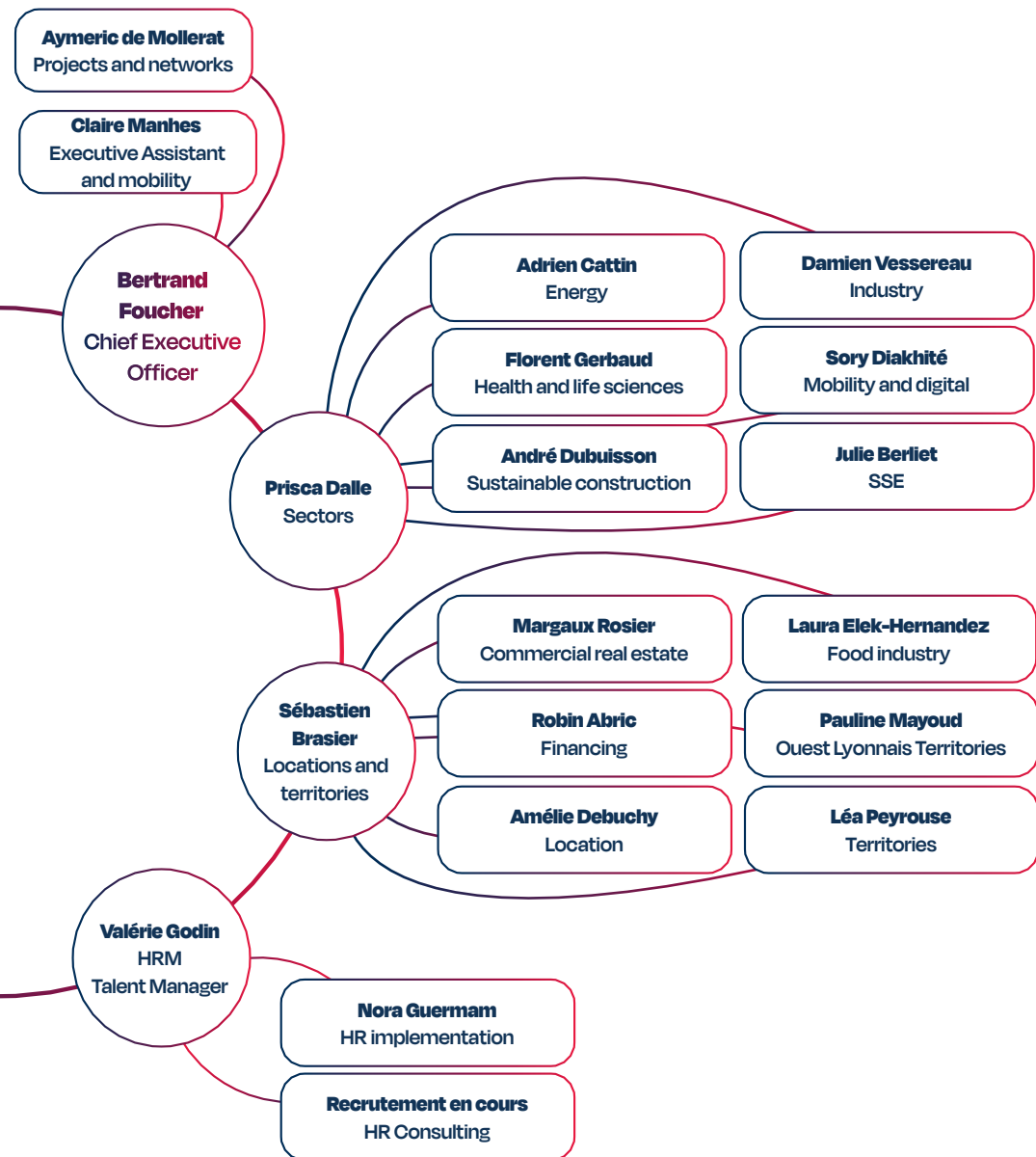
Our resources



Source: Budget 2023 ONLYLYON Invest

Our team







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