

BUSINESS REAL ESTATE

**ADDICTED
TO LYON**

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ONLY LYON 
GREATER LYON |

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EDITORIAL

CONTROLLED GROWTH FOR A FITTING SUPPLY

With a 27% increase in investments in 2012, Lyon continues to resist the economic crisis. With stable values, the second-largest French city after Paris is ranked by Ernst & Young among the top of Europe's economically most attractive cities.

The city has seen an investment of 845 M € in its business real estate market in 2012, thanks to the strength of its dynamic and dense economic fabric. 60% of investments took place in the office space market. This growth is of course based on the city's assets, its location, the quality of its infrastructure, and its quality of life, but also on its clusters, which set it apart from other large European cities. Health care, biotechnology, cleantech and the creative industry are Lyon's centres of excellence for research and innovation.

It is also the proactive policy of the public authorities, combined with a confident private sector, that allows the Lyon agglomeration to achieve this performance level. An ambitious real estate strategy providing a complete and clear supply; a qualitative and responsible urban development policy; an intelligent vision of the city, shared within a recognised governance system guarantee investors a healthy and regulated real estate market. Now more than ever, Lyon offers favourable conditions for corporate development in a sustainable environment, oriented towards services and the well-being of employees.

LYON AGGLOMERATION SUSTAINABLE PERFORMANCE

Alchemist,

Lyon is an agglomeration on a human scale that combines the innovation dynamics of a metropole with the creativity of a city for day-to-day living. Heritage, gastronomy, and large city parks sit alongside universities, research laboratories, high-tech industry and global business headquarters.

■ ATTRACTIVE

Registered as a **UNESCO World Heritage site since 1998**, Lyon has the doors to its history wide open for the 6 million yearly visitors: from the renaissance neighbourhood to the "Traboules" of the Croix Rouse, via the Museum of Fine Arts, the ancient theatre at Fourvière and the new Confluence area, offering over 2 000 years of refinement and cultural history, all discoverable by foot!



■ BUZZING

Known for its **gastronomic tradition and excellence in silk**, the Lyon agglomeration has a vibrant cultural scene. A leading urban event in France, the Festival of Lights attracts each year more and more enthralled visitors (3 to 4 million in 4 days each year). Together with the Biennial of Modern Art and of Dance, the Nuits Sonores (indie and electronic festival) and the Lumière Film Festival, Lyon has an international artistic reputation and offers to many a place of festivity and exceptional discovery.



**1st ECO-CITY
IN FRANCE:**

50% of car usage in the city centre

■ CREATIVE

Lyon's standards when it comes to quality of life and economic excellence attract each year more and more businesses and talent: outside of Paris, Lyon offers the best supply in France for investments or the presence of businesses, with real estate costs 30% lower than those in the Paris region. Lyon provides entrepreneurs with a climate of confidence which promotes the desire to invest and to commit: in 2011 almost 15 000 new companies were created in the Lyon territory.



.....
Behind Paris (29th) and ahead of Barcelona (40th),
Madrid (49th) and New York (44th)

**42% OF THE LYON POPULATION
are under the age of 25 (INSEE)**



■ CLOSE TO EVERYTHING

Equipped with an **outstanding multimodal infrastructure** (2 TGV stations in the city centre and Lyon-Saint Exupéry airport serving more than 120 national and international destinations), Lyon is thoroughly connected to the world. Capital of one of the most touristic regions in France, the city is one hour away from the alpine ski resorts, half an hour from the Beaujolais and two hours from the Mediterranean beaches.

■ GREEN AND SOFT...

With a **dense public transport network**, shared bicycle and car programmes, and a continuous development of bike lanes, Lyon favours the sustainable development of its neighbourhoods in terms of mobility and living conditions. All urban projects systematically address sustainability and high quality landscaping of public spaces: with large city parks, the Berges du Rhône redeveloped over 10 hectares, and tomorrow's Rives de Saône, Lyon actively reconciles environmental well-being with that of its residents.

THE STRENGTH OF A DIVERSIFIED ECONOMY

The agglomeration's economic fabric

is as much a major added value as a gauge of continuity for investors and businesses: with one business created every hour and with a higher density of headquarters than Barcelona or Manchester, talent finds in Lyon an optimal ecosystem of growth at the heart of the second-largest economic region in France.

■ SUCCESSFUL

Rated 19th as one of the most attractive cities in Europe (Cushman & Wakefield cities monitor 2011), Lyon offers everything expected from a large European city, at a reasonable price: Equipped with a strong infrastructure and offering reasonable rent pricing, Lyon hosts company headquarters, research and development hubs, production and logistics sites, which provide demanding users with an complete range of real estate options within the metropole.

■ INDUSTRIAL

The driving force of national industrial competitiveness, Lyon has been able to develop its historical industrial fabric. As the leading industrial agglomeration in France, the city attracts just as many key international accounts as small and medium-sized businesses from various sectors: life science, transport, food, chemical, pharmaceutical, textile, and creative industries.

■ DYNAMIC

With 5 clusters, including two at global level, various thematic clusters and high-performance governance systems, Lyon has a recognised know-how at its disposal to favour the presence and creation of businesses. The network "Lyon ville de l'entreprenariat" (Lyon, entrepreneurial city) receives, informs, orients and accompanies over 10 000 entrepreneurs per year, whichever their project.

1st

**INDUSTRIAL
AGGLOMERATION
IN FRANCE**
(outside Ile-de-France)

**14 600
businesses**

created in 2011

99 900 companies
(public and private sectors)

Over 500 000 salaried jobs
in the private sector

77.6% in tertiary sector, 15.4% in industry



19th European city for its
ECONOMIC ATTRACTIVENESS⁽¹⁾

9th EUROPEAN CITY
preferred by entrepreneurs⁽²⁾

1st European centre for the
PRODUCTION OF VACCINES

sources:

[1] European cities monitor 2011, Cushman & Wakefield
[2] National entrepreneur satisfaction index, ECER 2010



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SEVERAL BUSINESSES AND HEADQUARTERS

- 1 500 company headquarters, including Sanofi Pasteur, Biomérieux, Groupe SEB, Renault Trucks, EA (world headquarters), Bayer Cropscience, JTEKT, Scotts International (European headquarters)...
- Renowned international institutions: Interpol, Euronews, International Agency for the Research on Cancer, Handicap International, European Centre for Humanitarian Health, WHO, Worldwide cluster for monitoring and alerting of infectious diseases, the P4 Inserm Jean Mériex laboratory...

- Leading businesses: Apicil, Arkema, Bluestar Silicone, Boiron, Cegid, CNR, Danone, GL Events, Genzume, Irisbus, Mérial, Renault Trucks, TNT Express...
- Major Areva R&D site.

■ RHÔNE-ALPES, A EUROPEAN REFERENCE:

- 1st chemical production centre in France
- 2nd chemical region in France in workforce
- 2nd region in France for eco-industry in workforce

■ 2ND FRENCH CITY FOR BUSINESS TOURISM

With 390 congresses and professional trade shows and 2.9 million visitors, life in Lyon is punctuated by the dynamics of the economy. The quality and variety of its infrastructure have seduced over 21 000 event organisers of regional and international stature: Pollutec, Sirha, Solutrans, Biovision, Innorobot.

INNOVATION

A VOCATION AND AN AMBITION

In 2011, Lyon ranked 8th among 100 economically innovative cities according to 2thinknow innovation cities. With the ambition to become the benchmark territory for new mobility and a major player in intelligent energy, Lyon cultivates innovation across all areas, scientific, technological, but also social and organisational and clearly positions itself among the frontrunners of global smart cities.

■ INNOVATION

By creating the shared car system **AUTOLIB** in 2008 and the **VELO'V** bike rental network (27 million bikes rented!) Lyon already made a head start in terms of new mobility... Today, the city's innovation strategy is as oriented towards the invention of a simpler, more fluid, and more pleasant city, as to the development of international centres of excellence, with robotics and cleantech.

■ EDUCATION

Having merged 18 establishments from the Lyon and St Etienne agglomerations into the "University of Lyon", Lyon continues to modernise its higher education. The Lyon Cité Campus strengthens the synergy between education and business: The Charles Mérieux Campus for bio, human and social sciences, and the Lyontech-La Doua Campus for cleantech, for which it hopes to gain global excellence status.

■ INTERACTION

Capitalising on the important players in its territory – global industrial leaders, cooperation networks on university and scientific level – Lyon has been able to create a technological ecosystem in tune with strong societal issues and its industry of excellence. The development of ultra high-speed networks, a range of NFC services, and the access to digital public data for businesses speak for the community's commitment in developing conditions for innovation on its territory.

LYON

N°1

IN FRANCE
IN TERMS OF INNOVATION⁽³⁾

 **4th EUROPEAN REGION**
in terms of staff working in R&D

2nd REGION IN FRANCE
for patenting

8th INTERNATIONAL CITY
for its innovative vision in terms of economic and social development, ahead of London and Frankfurt⁽²⁾

1st

RESEARCH AND HIGHER EDUCATION CENTRE IN FRANCE

120 000 students, 12 325 researchers and 500 public and private laboratories⁽¹⁾

sources:

(1) Académie de Lyon
(2) 2thinknow Innovation Cities™ Global 256 Index 2011
(3) 'Entreprise ranking 2012



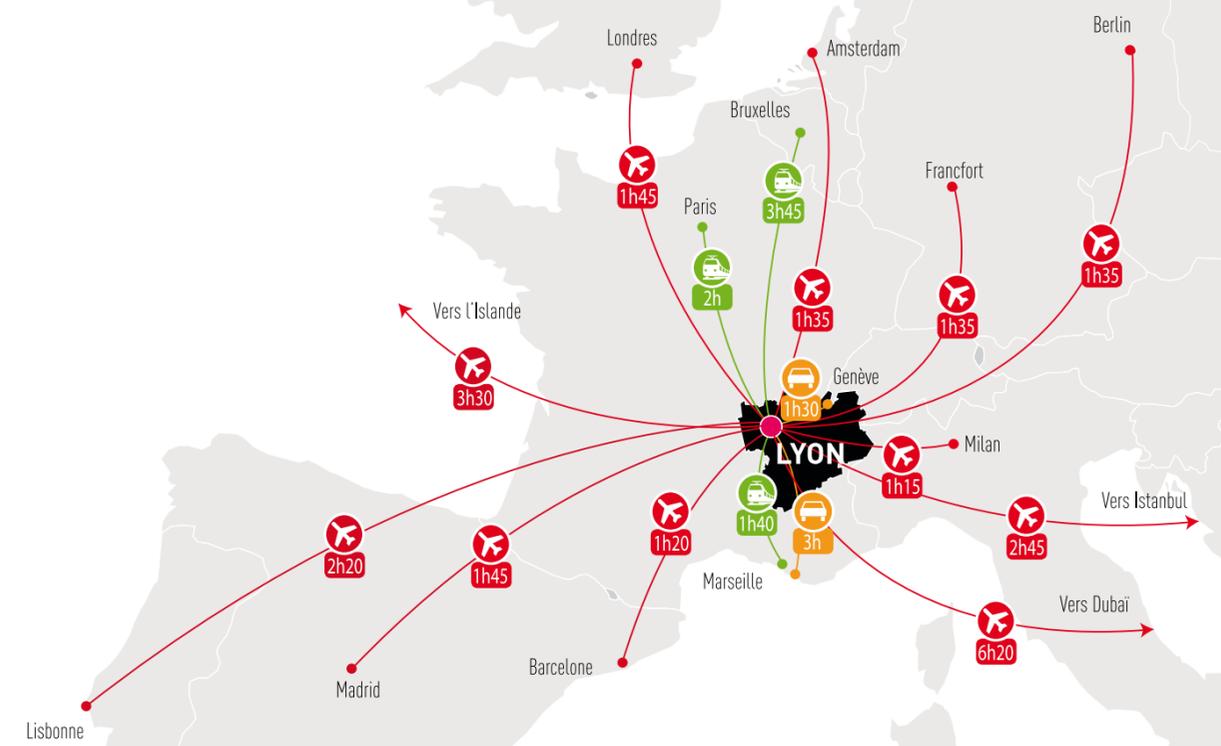
5 CLUSTERS, INCLUDING TWO GLOBAL

- Lyonbiopôle, a reference for Life Sciences: infectious diseases, oncology and neuroscience,
- Axelera for the chemical and environmental industry
- Lyon Urban Truck & Bus for transport systems
- Techtera for textile techniques
- Imaginov for digital entertainment



DIRECT CONNECTIONS

LYON OPEN TO MAJOR CITIES



BUSINESS REAL ESTATE

A COMPLETE OFFER IN A HEALTHY MARKET

The Lyon

business real estate market is resisting the negative economic situation in 2012. If take-up of office space declines, it strongly increases within commercial and logistics real estate. For its part, tertiary investment reaches a new record with an increase of 27%! Evidence that investor confidence in the Lyon market is there.

OFFICE SPACE REAL ESTATE: STRENGTH THROUGH DIVERSITY

With a take-up of almost 185 000 m² in 2012, the tertiary real estate market in Lyon is bigger than that of Lille (1 136 000 m²), Marseille (159 000 m²) and Toulouse (146 800 m²). After an exceptional year in 2011, the number of transactions fell from 480 to 468 in 2012. Despite a 27% drop in volume, the number of transactions remains stable and the market is very active. The market is strongly established in medium-sized transactions, between 500 and 2 000 m², answering the needs of the economical fabric.

Note that by integrating important transactions that are being finalised, the take-up would have retained its 2011 level.

3.8 BILLION € INVESTED REGIONALLY IN BUSINESS REAL ESTATE IN 2012

of which 845 million € in the Lyon market, more than 22%

5.2 MILLION M² TOTAL OF TERTIARY REAL ESTATE IN 2012

AN AVERAGE YIELD OF 6%

NEW CONSTRUCTION PROPERTY: A PREFERENCE FOR QUALITY

Transactions in new construction represented 83 541 m² in 2012, which is 45% of all transactions (49% in 2011). The reduction in the supply of new construction marks a year of transition for major projects, which works in favour of other (and qualitative) areas such as Villeurbanne-Grandclément, which shows an increase of 21% compared to 2011 with 20 902 m² (11% of the take-up). The dynamics of this area are undeniable, showcased by several very successful real estate transactions demonstrating the appeal that restructured buildings meeting environmental standards have on users.

ONLYLYON 



RENTAL: 82% OF ALL TRANSACTIONS

If renting represents 82% of the markets transactions as seen in 2011, we note a large variation between the sectors: rental represents almost 93% of transactions at the Part-Dieu area, 60% in Gerland but only 38% in Northeast Greater Lyon.

This distribution is indicative of Lyon's economic fabric: companies located in its business areas are looking for more flexible real estate solutions, while small and medium-sized businesses in the Northeast are reasoning from a patrimonial standpoint and are thus firmly anchored in their areas.

TERTIARY: THE TERRITORIES' COMPLEMENTARY NATURE

Like the previous years, the Lyon Part-Dieu business area leads the ranking of real estate transactions with 32 895 m². The Part-Dieu area registers a 41% decline in take-up compared to 2011, caused by the absence of availability in new construction, still representing 18% of the total take-up. Villeurbanne / Carré de Soie sees an increase of 21% compared to 2011 with 20 902 m² and the take-up in the Gerland and East Greater Lyon sectors remains stable – around 20 000 m²/year each. These results show the strength of the industrial fabric and of the small and medium-sized businesses, which support a market specifically adapted to their needs.

**PRIME RENT IN THE PART-DIEU
AREA:**
260 € ex VAT ex SC/m²/year
(320 € ex VAT ex SC for high rise)

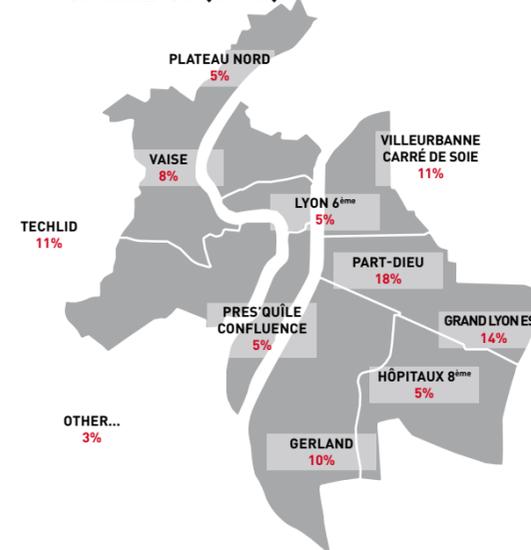
**CONSTRUCTION
COSTS INDEX:**
+ 1.5% over one year at 1648



MAIN TERTIARY TRANSACTIONS:

CARRÉ DE SOIE: VEOLIA / LYON PART-DIEU: ORANGE / VILLEURBANNE GRANDCLÉMENT: ATOS WORLDLINE, GRAND LYON, PAGES JAUNES / GREATER LYON EST - SAINT PRIEST: ALSTOM GRID, SEGULA TECHNOLOGIES

GEOGRAPHICAL DISTRIBUTION OF TAKE-UP (IN M²)



+ 27% IN INVESTMENTS: A GOOD YEAR

- With an investment estimated at over 845 M€ (some marketers report results up to 925 M€) 2012 is a good year (667 M€ in 2011). This 27% increase fortifies Lyon's position as an attractive city for internationally operating investors.
- Beyond the numbers, the type of investors and investments also supports this: Grosvenor, together with QIA, investing 309 M€ in a real estate complex (shops, offices and housing) on the Presqu'île, and AEW's purchase of the Oxygène tower.
- The third point of satisfaction is asset diversification: only 60% of investments - against 85% in 2011 - have been placed in office spaces.

Source:
FNAIM

BUSINESS REAL ESTATE

A ROBUST AND ADAPTED MARKET

■ PRODUCTION SITES: A REMARKABLE DYNAMIC

Despite the economic crisis, the market maintains good momentum with a take-up of 209 482 m² net floor area in 2012, the commercial real estate market shows a decent growth in the Greater Lyon territory (195 748 m² in 2011), while the outskirts report a slight decline.

The trend towards rental started in 2011 continued in 2012: rental transactions are still the majority and are even on the rise (63% in 2012 against 55% in 2011). It is the availability of rental space and a greater difficulty for companies to gain access to financing that explain this increase in rental transactions.

■ LOGISTICS: 26% INCREASE IN TAKE-UP

The logistics market in Lyon has very good results despite the context of national decline. The 34% downturn of the national market for logistics (take-up of 1.8 million per m² in 2012 of which 73% on the French North-South axis) is explained by the wait-and-see approach and cautionary attitude. Unlike the Île-de-France and Marseille, which are particularly affected, take-up in Lyon registers an enviable result of + 26% compared to 2011.

Rental space accounts for 89% of take-up in 2012. Transactions are mainly closed in existing property (29% of m² taken up in new construction in 2012 compared to 65% in 2011), which allowed the reduction of the vacancy rate while maintaining price levels (between 40 and 46 € ex VAT ex SC/m²/year). The main transactions were closed in the North Isère and East Lyon (63% of the take-up in 2012), as well as in the commercial areas in the agglomeration's east (61 896 m² take-up).

MAIN TRANSACTIONS OF PRODUCTION SITES

MEYZIEU: AGRA / CORBAS: GROUPE GAMI

SAINT-PRIEST: LAURENT PÈRE ET FILS, STEMCOR, MEDICAL GROUP



■ RETAIL: THE CENTRE'S APPEAL AND THE QUALITY OF SUPPLY

With 1.5 million m² of commercial estate, the city of Lyon encompasses all flagship stores and various multi-brand shops. The majority of small retailers are located in Lyon (55%) and Villeurbanne (10%). 70% of super- and hypermarkets are in close proximity to Lyon and Villeurbanne. The commercial master plan outlines the development until 2015.

Commerce turnover
in Greater Lyon:
7.2 BILLION EURO

COMMERCIAL DYNAMICS IN 2012

• **April 2012: opening of the Confluence shopping and recreation centre:** 53 000 m² GLA with approximately a hundred shops, including a few "firsts" for the Lyon region (Bose, Muji, ...) a Carrefour hypermarket, a UCG 14-theatre multiplex cinema, and recreational commerce (Azium, Ludopole, Fitness Park, ...).

- **New record** for the Pathé cinema complex at Carré de Soie with 1 227 035 admissions in 2012 (most-visited cinema in the Rhône-Alpes region).
- Grosvenor's acquisition of close to forty buildings in the Rue de la République for just over **300 million €** from ANF.

■ HOTEL SUPPLY: +7% INCREASE!

2012 will be a memorable year for the Greater Lyon hotel industry, which had an unprecedented growth of supply: +7% or 1 007 hotel and apartment hotel rooms, in addition to the 294 rooms (net) delivered at the end of 2011. That is more than over the past 7 years put together. 2012 was a good tourist year and its 125 000 additional nights compared to 2011 did not prevent the dilution caused by the growth in supply – correlated to a recessive economic context – the total performance lost 1.5 points in OR. This moderate contraction was compensated by an increase in average price level (+ 1.7%) minimising the RevPAR's decline by 1.3 points.

HOTEL INDUSTRY IN 2013: 8 NEW PROJECTS

In 2013, the hotel industry continues to expand. In January, the Ibis Budget hotel at Lyon-Saint Exupéry airport (137 rooms, budget category, Sector East) opened its doors. Further openings scheduled for 2013 include:

- RT My Aparthotels 158 keys, sector Northwest
- Mama Shelter 154 keys, Lyon 7th Jean Macé
- Quality Inn 100 keys, Lyon city centre
- Comfort Inn Meyzieu 70 keys, sector East
- Ace Hotel 87 keys, sector East
- Kyriad 80 keys, sector East
- Lyon Canabae 16 keys, Lyon city centre

2012
+ 1007 ROOMS

[1] Revenue per available room. A measurable indicator which permits us to understand the performances of a hotel
[2] OR: Occupancy Rate

GREATER LYON:
The locations

KEY

PHASING



OTHER

 Greenery and parks

TRANSPORTS

 Motorway
 Planned motorway
 Public transport

A DENSE NETWORK FOR SOFT MOBILITY

- 4 metro lines
- 4 tramways
- 2 funiculars
- 120 bus and trolleybus routes
- 1 direct tramway city centre Lyon-Saint Exupéry airport
- 340 Vélo'v stations, the first city bike rental network, in France with 4 000 bikes
- 34 autolib' stations, with 250 shared cars

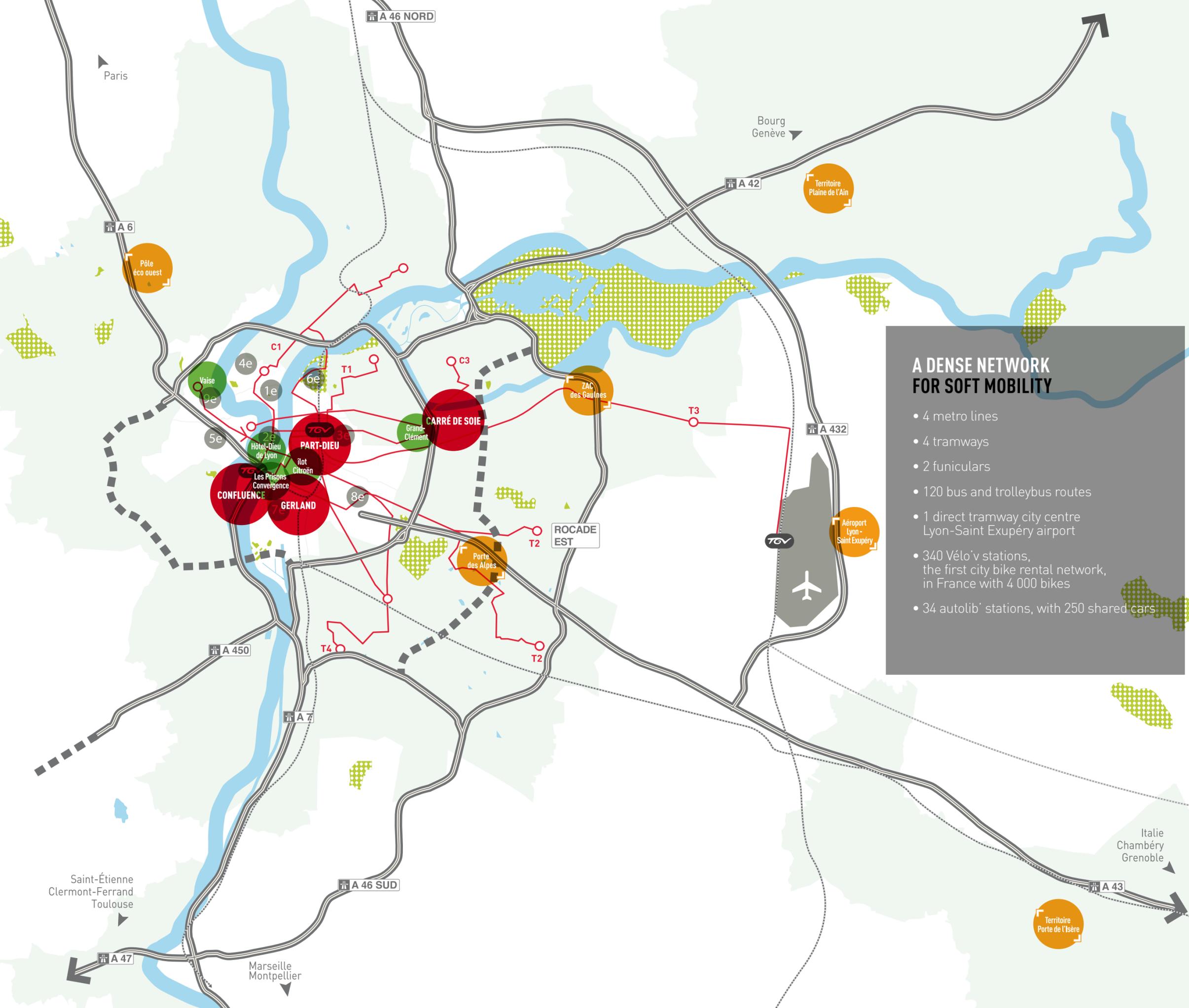
RHÔNEXPRESS
LYON-SAINT EXUPÉRY AIRPORT
+ DE 8 MILLION PASSENGERS
 in 2012
120 DIRECT NATIONAL
 and international destinations

DIRECT CONNECTION WITH THE CITY CENTRE
 by tramway in less than 30 minutes

3 TGV STATIONS
UP TO 150 TGVs / DAY
 at Lyon Part-Dieu railway station
 (Doubling of Paris / Lyon after 2020)

MAJOR PROJECTS

- > **RHINE-RHÔNE LINE**
Lyon / Frankfurt direct since early 2012
- > **LYON / BARCELONA DIRECT**
as of 2013 in 3h45
- > **LYON / TURIN - MILAN**
after 2020



CAUTIOUS AND CONCERTED GROWTH OF REAL ESTATE SUPPLY

Lyon's economic fabric is remarkable for its density and diversity:

from very small innovative businesses to small and medium-sized industry, key national and international accounts, all profiles are present within the agglomeration. All need proximity, connectivity, and innovation to facilitate and streamline their development. They also need an environment whose physical and technical characteristics are adapted to their profession and their needs. Greater Lyon and its partners offer each of them global and personalised solutions to create conditions that nourish their talents and encourage their growth.

■ A TERTIARY AMBITION THAT ENSURES VISIBILITY AND COHERENCE

To encourage the development and presence of businesses, the agglomeration adopted a strategy built around four priorities:

- Bring clarity to the various sites at the scale of the agglomeration showcasing the specificity of each site and how they complement each other.
- Create a complete, non-competitive tertiary supply, by positioning the urban projects in relation to each other to ensure a coherent market.
- Offer time-phased planning of urban projects to control the growth of the agglomeration.
- Promote an urban mix, in order to offer an optimal work environment combining spaces to relax, commercial offerings, transportation, etc.

4 MAJOR URBAN PROJECTS SYMBOL OF THE 4 GROWTH AXES...

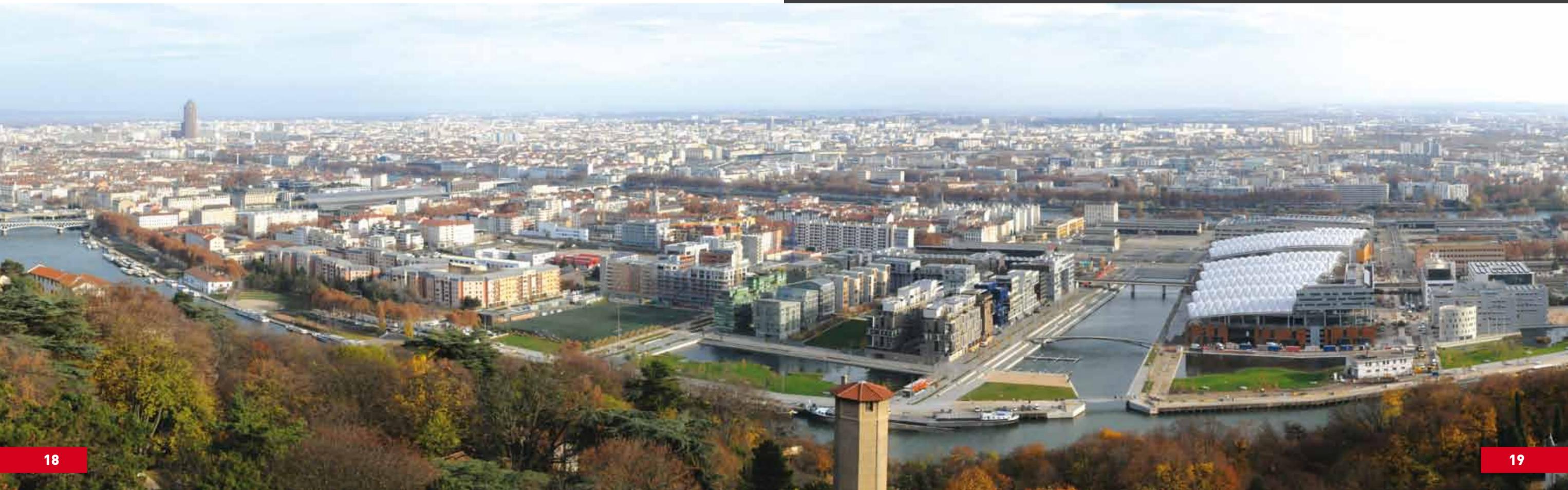
- Lyon Part-Dieu, an original and multimodal growth ecosystem,
- Lyon Confluence, a sense to the city within a mixed neighbourhood, showcase of the smart city,
- Lyon Carré de Soie, a natural reserve of opportunities for the green and environmental economic industry,
- Lyon Gerland, the factory of excellence, a territory of expertise accommodating the entire biotech value chain.

... AND TERTIARY AND MIXED HUBS THAT ENSURE

A BALANCED AND IN-DEPTH SUPPLY:

Because investors and businesses need a sustainable, qualified, and service-rich and cost-efficient real estate supply, Greater Lyon continues a controlled and ambitious policy when it comes to the market availability of business property and real estate. Its mission is to guarantee, even in difficult economic circumstances, adequate solutions to users' expectations. The planning of the real estate supply has been worked out by taking the reality of the market and the future projections into account. The results of 2012 prove this: renewed investor confidence and overall positive results driven by local needs and the centres of excellence of the agglomeration's economy.

In addition to the major urban projects, the agglomeration's tertiary and mixed hubs offer qualitative and competitive site conditions: West economic centre, Lyon Vaise, Porte des Alpes, La Saulaie (Oullins), Puisseux, Le Grand Montout and Grandclément (Villeurbanne).



THE VALUE CHAIN OF REAL ESTATE IN LYON

DEVELOPER

L. DOYAT

Director of territorial development
Rhône-Alpes Auvergne

■ ICADE PROMOTION

What is your view on the Lyon real estate market?

ICADE promotion is first and foremost a national player, but also a major player in the Lyon market. This position allows us to analyse the Lyon market in the context of the difficult economic situation we're currently in. Of course like everywhere else it takes longer to come to decisions but the Lyon market is resisting well.

"Of course like everywhere else it takes longer to come to decisions but the Lyon market is resisting well."

In volume, the take-up decreases this year but is not far off the yearly averages and the outlook for 2013 is positive. In terms of value, when we compare it to other European agglomerations, rents are on the rise or stabilise since a number of years; never in decline. This is a sign of the confidence that professionals have in the Lyon market. The latter resists cycles well because it has its own dynamics.

What explains this resistance to cycles?

It is a market with a solid foundation. With little stock and real depth that is based on a very dense economic fabric and that can count on major regional, public, semi-public, and private headquarters. This variety is a growth lever to be reckoned with, providing restructuring possibilities or important new programs and opportunities in the setting up of new projects. Because in Lyon investors and users have high standards, selectiveness in the tertiary sector is strong. The four main tertiary sectors, Part-Dieu, Gerland, Confluence and Carré de Soie (to which Vaise can be added) provide quality solutions for the expectations of tertiary investors and users. It is not by chance that ICADE has developed projects in these sectors and continues to do so...

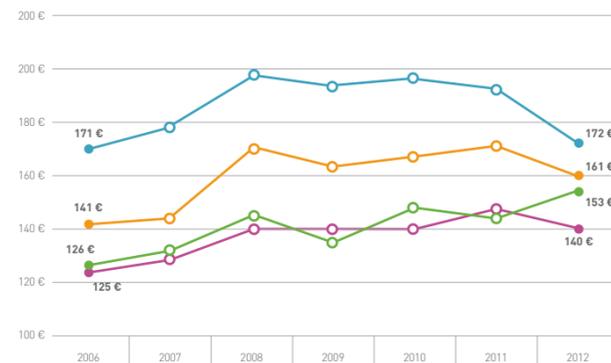
What do you think of Lyon's "working together" approach?

It is a reality. ICADE is a longtime partner of Greater Lyon. For us, Greater Lyon as a tool is an excellent opportunity: a unique executive body with all the urban, technical, architectural, statutory, and environmental expertise necessary, which gives us the confidence and emulation that serves both the efficiency of financing strategies and the quality of credit.

Thank you very much. Lyon in one word?

"A DYNAMIC VISION"

■ RESULTS OF THE YEAR 2012: RENTAL VALUES (IN €)



Sources: FNAIM

USER

M. TOUATI

Purchase and Logistics Director

"Lyon [...] represents a very active and fast growing market"

■ SOPRA GROUP

BUILDING WITH AN 8 000 M² SURFACE AREA
DEVELOPER: LAZARD GROUP
ARCHITECT: ARCHITECTURE STUDIO
INTERIOR ARCHITECT: ATELIER ANNIE VITIPON

What's the history of Sopra Group and Lyon?

With more than 14 000 employees in Europe, Sopra Group is a leader in consulting, IT services and software development. We have been in Lyon since the company was founded over 40 years ago, most recently in Ecully and Vaise. Lyon, taking into account the wealth, diversity, and various sizes of its businesses, represents a very active and fast growing market, in a profession where we need to ensure great proximity to our clients.

What's the latest news for Sopra Group in Lyon?

We would like to bring our two sites together and dispose of bigger premises: our strong growth dictates this, Sopra Group features among the biggest recruiters in France. Furthermore, we wanted to equip ourselves

with property completely adapted to our needs and meeting our environmental expectations (BBC-HQE) while ensuring a genuine quality of life for our employees. That's now a reality with our new premises in Limonest...

... A new building for new dynamics.

Yes, that's right. We've chosen the west of Lyon because it combines all the positive aspects we were looking for: economical appeal, environmental quality, quality in service, overall financial balance but also a consideration for the location of our employees. We've chosen a turnkey building that responds to our professional specificities in facilitating the workspaces and recreation areas as well as our technical constraints.

Thank you very much. Lyon in one word?

"A CROSSROADS"

INVESTOR

O. ESTÈVE

CEO

■ FONCIÈRE DES RÉGIONS

Today Lyon is the second-largest tertiary conglomerate in France.

It is a deep and transparent market that benefits from the agglomeration's dynamic economic development. These characteristics make it very appealing for both businesses and investors like us.

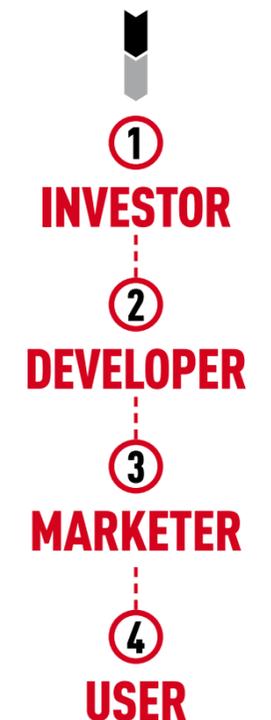
In addition, the city has the advantage in offering a diversified and complementary real estate supply. On one hand, the Part-Dieu area, historical and central business centre equipped with all kinds of services and directly linked to the largest regional transport hub (TGV, regional trains, tramway, metro), but which is now in need of a revitalisation, through the development of latest-generation buildings. On the other hand, there are other tertiary areas developing in the agglomeration such as Gerland, Carré de Soie or even Tonkin in Villeurbanne where we have renovated the Patio building. It had been rented at 100% even before its completion in February 2013. This success is explained by an attractive location (close to the Parc de la Tête d'Or; in extension of the Part-Dieu business hub), an optimised public transport service, an important road network, but also by competitive rent in renovated and modernised buildings.

Thank you very much. Lyon in one word?
"AN AMBITIOUS TERRITORY"

■ COMPARISON OF OFFICE SPACE PERFORMANCES

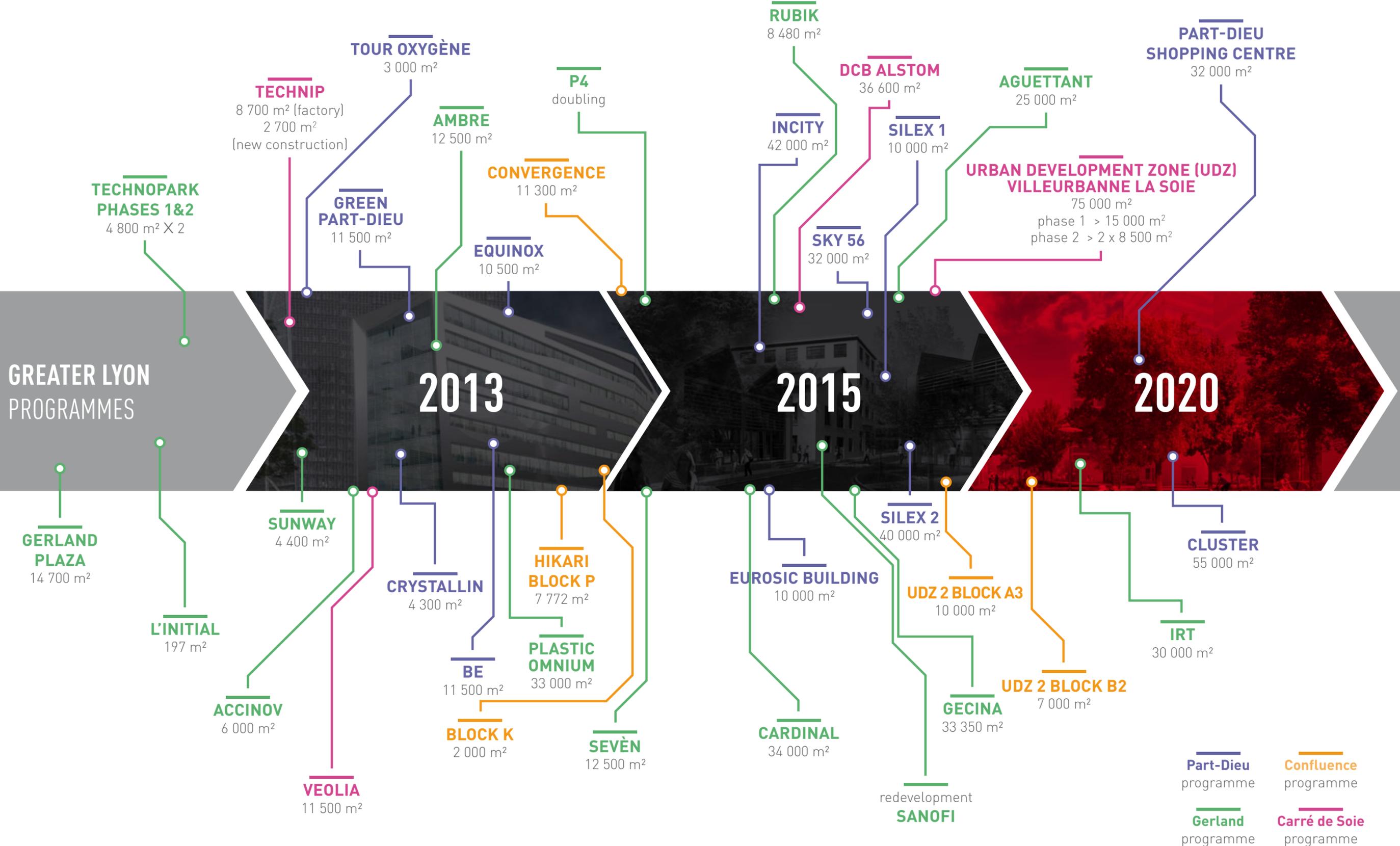
	TAKE-UP (M ²)	AVAILABLE STOCK (M ²)	PRIME RENT EX VAT/M ² /YEAR
PARIS IDF	2 380 638	3 585 000	770 €
FRANKFURT	508 800	1 505 000	410 €
MILAN	249 000	1 399 880	500 €
AMSTERDAM	227 600	965 600	335 €
BARCELONA	200 250	827 730	216 €
LYON	185 000	380 000	260 €
MARSEILLE / AIX	159 000	199 900	260 €
TOULOUSE	146 800	199 000	200 €
MANCHESTER	142 520	456 620	398 €
LILLE	136 000	241 773	200 €

Sources: FNAIM



OPPORTUNITIES

IN 2013



URBAN PROJECTS

LYON PART-DIEU, A NOVEL AND THRIVING ECOSYSTEM

The second-largest tertiary hub and concentration of headquarters in France and the area of reference for the agglomeration's tertiary industry Lyon Part-Dieu continues its development by becoming more and more one of Europe's leading areas for pilot activities and conception of new industrial, energy, urban and infrastructure systems including IT and digital technologies. Adding to the business area's historic activities, these functions strengthen its international appeal. Investors and businesses wishing to invest in latest-generation buildings, designed to optimise the quality of working environment, with excellent value for money, find a competitive environment and important projects.



CONNECTED

A central and easily accessible location forms the DNA of the Lyon Part-Dieu area, which is organised around the TGV station an its multimodal hub: its express tramway connecting the Lyon-Saint Exupéry international airport in 30 minutes, metros, tramways, buses, vélo'v stations, taxis, bus terminal, car rental and over 7 500 public parking spaces weave an outstanding and unique multimodal pattern. Connected to Europe, Lyon Part-Dieu is immediately linked to Lyon's city centre, as well as to the major economic hubs in Lyon's south and east: Villeurbanne, Carré de Soie, Meyzieu, Gerland and Confluence

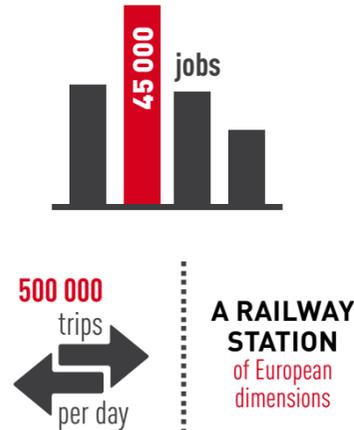
INTENSE

Switching from dynamic business activities (20 000 jobs in the area), the area's growth shows a specialisation towards the fields of energy, engineering, complex projects, infrastructure and physical, IT and digital networks, with large groups and small and medium-sized businesses working at a regional and global level (also 20 000 jobs in these fields). These economic developments accompany the area's substantial transformation into a leading tertiary hub in Europe. More than just a business area, Lyon Part-Dieu is a space of flux and exchange, a lively area punctuated by a renowned cultural offering and appealing events.

EFFICIENT

With an extreme high-density level of facilities and services, the area's development project aims to diversify the real estate supply by offering a complete range of tertiary products. The quality of services, and the quality of life for businesses, their employees, their visitors and residents is at the heart of the project, by creating public spaces that include places to breathe and relax. Performance and quality of life are also very important in the major project "Gare ouverte", reconnecting/restructuring the multimodal transport hub to offer more comfort, capacity for growth and dedicated business service areas. From the heart of the area starts the expansion of soft transport modes, pedestrian connections, and the creation of innovative and intelligent signage to promote mobility and reduce travel time.

The rehabilitation of the existing stock through large-scale projects is based on the area's architectural heritage and develops underused property. As a genuine reconstruction of the city, it is reflecting the silhouette of the city, trusted to the signatures of talented architects.



2 000 hotel and apartment hotel rooms

650 000 m²
additional office space between now and 2020

130 TO 320 € EX VAT/M²/YEAR
RENTAL RANGE
IN LYON PART-DIEU

LYON PART-DIEU: Main projects

KEY

PHASING

-  Existing property
-  Under construction
-  1 Velum 2013
-  2 Be 2013
-  3 Aprilium 2 2013
-  4 Equinox 2014
-  5 Departemental archives 2013
-  6 Incity 2015
-  7 Le Cristallin 2013
-  8 Green Part-Dieu 2013
-  Planned
-  9 Sky 56 2016
-  10 Immeuble Eurosic 2015
-  11 Silex 2 2017
-  12 Silex 1 2015
-  13 Cluster HB 2018

OTHER

-  Greenery
-  Recreational and commercial centre
-  Multimodal hub

TRANSPORT

-  Motorway
-  Road
-  Railway
-  Metro station
-  Bus station
-  Tramway station
-  Tramline
-  Planned tramline
-  Multimodal hub
-  Main bus route

TRANSPORT INFORMATION:

- TGV hub of national and European stature, up to 150 TGVs and 400 regional trains per day.
- 30 minutes from the Lyon-Saint Exupéry international airport: 120 international destinations.
- Metro line B, tram T1, T3 and T4, "Rhônexpress" and 11 bus services.

FACILITIES:

- More than a hundred restaurants: mixing large chains, high quality, and traditional restaurant supply.
- A diversified hotel range with 2 000 rooms, from 1 to 4 *, in both hotels and apartment hotels;
- An extensive cultural and recreational offering: Lyon's central multimedia library, les halles Paul Bocuse, Auditorium, multiplex cinemas...
- Six inter-company daycare centres
- Numerous sports facilities, both private and public: swimming pool, gymnasium, gyms.



FOCUS CLUSTER OF HOTELS AND OFFICES: AN UNCONVENTIONAL MIXED PROJECT



In 2018, Lyon Part-Dieu's heart will beat a little faster,

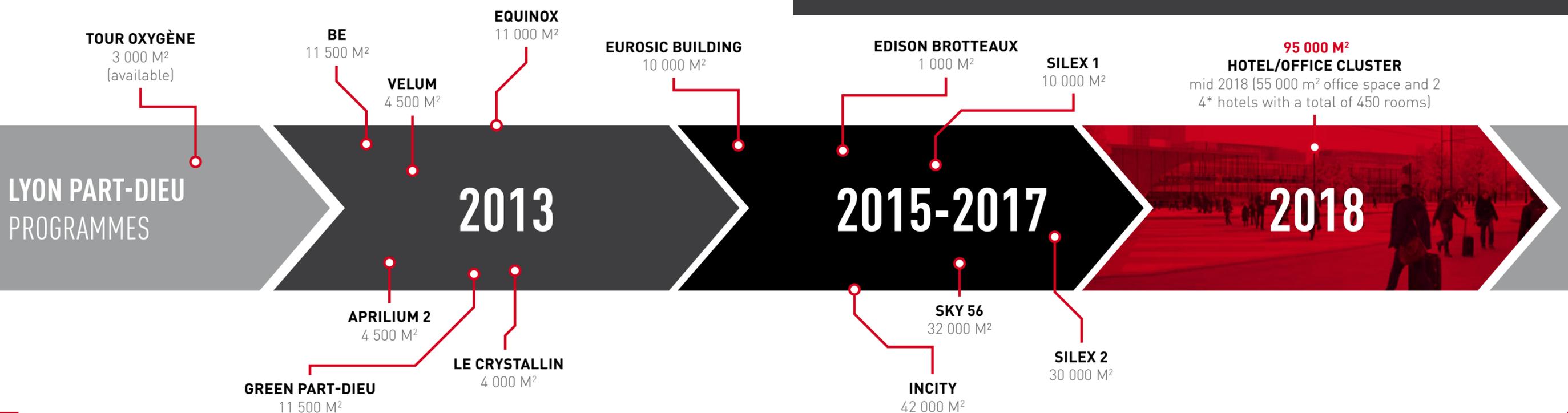
enhanced by a new and exceptionally attractive hub... The most important tertiary and hotel industry programme ever undertaken in Greater Lyon for its size, the 95 000 m² cluster of hotels and office spaces will be placed next to the Lyon Part-Dieu railway station. At the current site of the Novotel and Athena hotels, 25 000 m² of buildings will be demolished to make space for the construction of an ensemble of 95 000 m² providing a combination of offices, hotels, shops and services:

- 4 * Crown Plaza hotel with 250 rooms,
- 4* Novotel hotel with 200 rooms
- 55 000 m² of office space.



THEY HAVE ALREADY CHOSEN LYON PART-DIEU FOR THEIR REGIONAL AND INTERNATIONAL ACTIVITIES OR HEADQUARTERS:

- Energy: Areva, EDF, ERDF, GRDF, Vinci Energies, Enel Green Power, Spie Nucléaire...
- Industrial and urban engineering: NFM technologies, Rhodia, Bluestar Silicones, Egis, Artelia, Setec, Pojry...
- Transport and mobility: SNCF, RFF, Keolis, Axxes, Emirates, Air France, Clasquin...
- IT and digital service providers: Atos Worldline, Orange, Cisco, Oracle, Everial, Intitek, Compart, Asolution, CSIF...
- Developers: Certu, Nexity, Bouygues Immobilier, Icade...
- Banks and business financial services: Caisse d'Épargne, Banque Populaire, Banque Rhône-Alpes, Société Générale, BNP Paribas, Banque Palatine, Natixis, Oséo, Crédit Mutuel Arkéa...
- Services, auditing and consulting: Ernst & Young, Manpower, Haworth, Adamas, American Express, Nespresso, Grant Thornton...
- Insurance: April, Maaf, Maif, Scor, Swiss Life, Groupe Mornay, Réunica...
- World Trade Center Lyon: located since 2012 in the Oxygène tower, hosting 20 international companies starting their business in Lyon.



LYON CONFLUENCE, CONVERGING ASPIRATIONS

La Confluence is one of the biggest urban redevelopment projects in Europe.

It focuses on the transformation of brownfield sites located at the confluence of the Rhône and Saône, as an extension of Lyon's city centre, doubling its size. The first phase was successfully completed and already 35 hectares of the second phase invite further investment in this exceptional, bright, waterside and natural environment at the confluence of the two rivers.



CENTRAL

Special attention has been given to transport, as the space has physical constraints. Directly connected to the Perrache transport hub, which provides a bus terminal, railway station for TGV and regional trains, and the metro terminal, there is the T1 tramway running through the area. This line will be extended to the Gerland area in 2014. The creation of a railway stop on the territory's south end is under consideration.

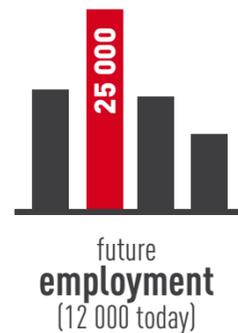
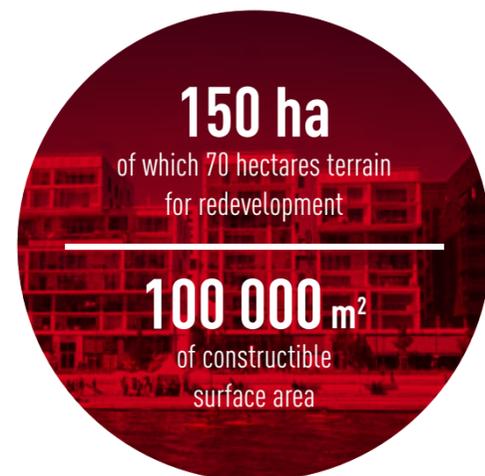
In an easily walkable neighbourhood, a bridge dedicated to tramway and soft transport modes will cross the Rhône starting late 2013 to connect with Gerland. In 2020 the Girondins bridge will strengthen the connection of these two areas.

INNOVATIVE

How to optimise parking according to life and user style? Along the Quai de Perrache, a unique system of shared parking spaces is under development: used by employees during the day and available for residents and visitors at night and on weekends. This way, public space is freed from parking and can be put to better use. As the first French WWF sustainable area, Lyon Confluence is committed to emitting no more greenhouse gases in 2020 than in 2000. Laboratory and showcase for the "smart city", Confluence houses various environmental initiatives: renovation of old buildings, sustainable new buildings, creation of an urban heating network, use of biomass and solar energy, controlled role of the car, anticipation and sharing of produced energy.

CREATIVE

Bordered by a 2-kilometer long city park along the Saône riverbanks, the Confluence embraces a mix of uses, creativity and innovation. The area already houses various media outlets, cultural institutions and governmental entities (Rhône-Alpes region headquarters, Regional Chamber of Commerce and Industry, the Bank of France...). Designed around an artificial waterfront and interspersed with numerous terraces, shops, recreational facilities and apartments, it offers its residents a sustainable and comfortable living environment. Businesses that have chosen this area take advantage of high quality visibility, in close proximity to the historic city centre.



LYON CONFLUENCE: Main projects

KEY

PHASING

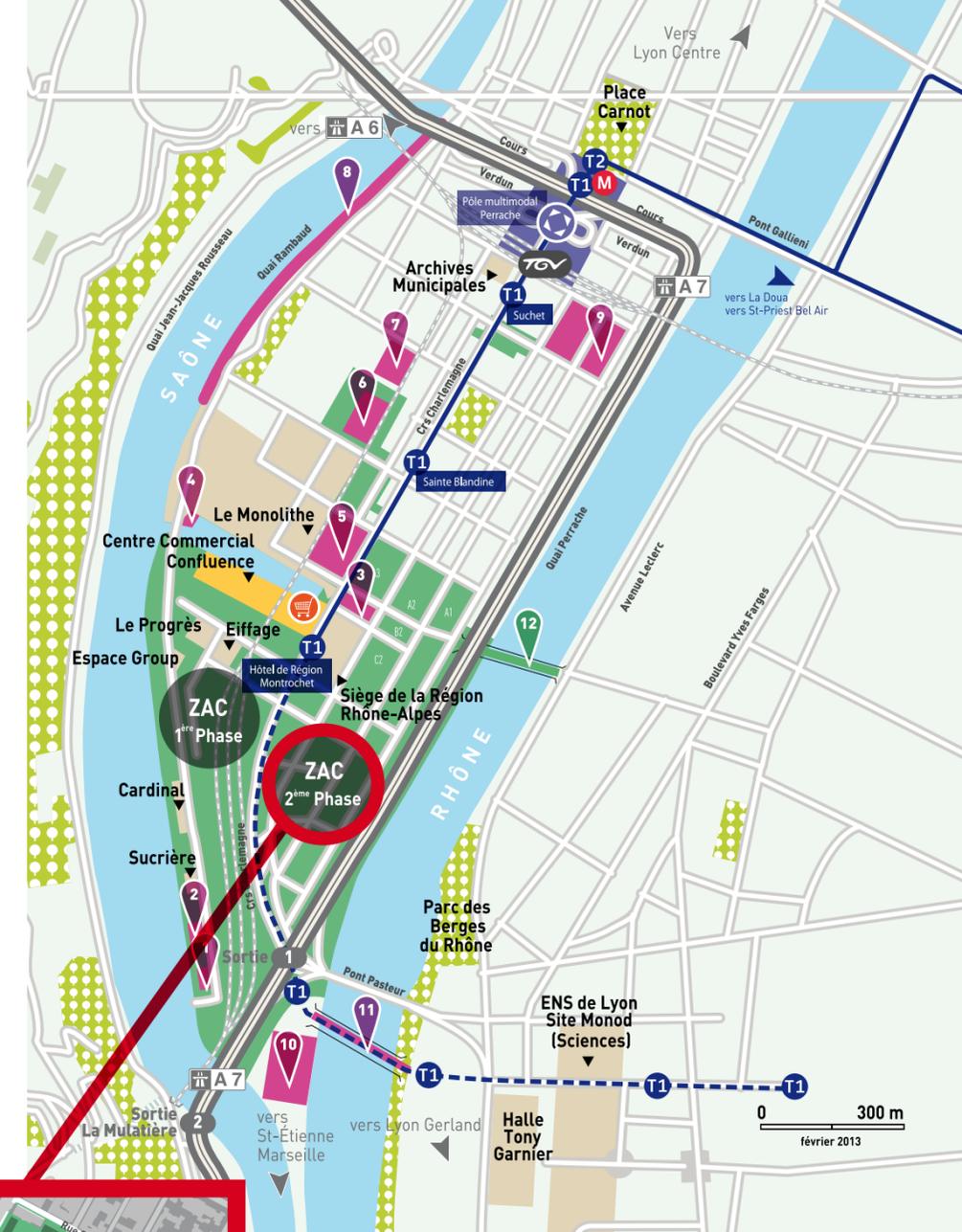
- Existing property
- Under construction
- GL Events 2013
- MJC 2013
- Îlot K 2014
- Raymond Barre bridge 2014
- Euronews 2014
- Îlot P Hikari 2015
- Planned Rives de Saône project
- Musée des confluences 2014
- Esplanade Fr. Mitterrand
- Îlot H 2014
- "La VIE grande ouverte" 2015
- Planned
- Girondins bridge

OTHER

- Greenery
- Recreational and commercial centre
- Multimodal hub

TRANSPORT

- Motorway
- Road
- Railway
- Tramline
- Metro line
- Tramway station
- Planned tramline



1st Phase

Urban planners: **Atelier Ruelle**
Landscape architect: **Michel Desvignes**

2nd Phase

Urban planners: **Herzog & de Meuron**
Landscape architect: **Michel Desvignes**

Perrache railway station and former prisons

Urban planners: **Atelier Ruelle**
Eco-renovation: **Urbanis, Tribu, Enertech, Hespul**

LYON CONFLUENCE, IN 2020



Lyon Confluence has entered its second construction phase:

The terrain previously occupied by the wholesale market and the railways has been redesigned by the firm Herzog & de Meuron to house a multifunctional project. In 2020: 420 000 m² of net floor area, 50% of which intended for tertiary activities, 40% for housing and commercial activities and the remaining 10% for public facilities. Two sectors distinguish themselves: The market area, mixed and dense, maintains 30% of the covered market heritage. It will become the new home for the Maison de la Danse. Le Champ, a green zone composed of private plots, bordered by public pathways and valleys, will house activities for creative industries and a residency for international researchers.

1st Phase
(2003-2015) on 41 ha
400 000 m² net floor area including:

- 145 000 m² housing
- 130 000 m² for tertiary and activity use
- 95 000 m² retail, hotels and services
- 30 000 m² public facilities and spaces

1.165 M€ IN INVESTMENTS

2nd Phase
(2011-2015) on 35 ha
420 000 m² net floor area including:

- 140 000 m² housing
- 230 000 m² or tertiary and activity use
- 15 000 m² retail hotels and services
- 35 000 m² urban public facilities

FIRST COMPLETIONS PLANNED FOR 2016

PERRACHE AREA

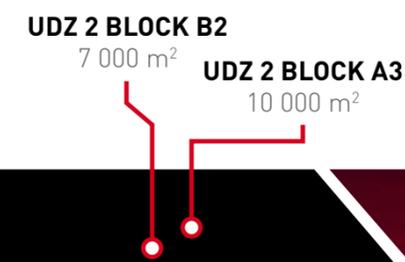
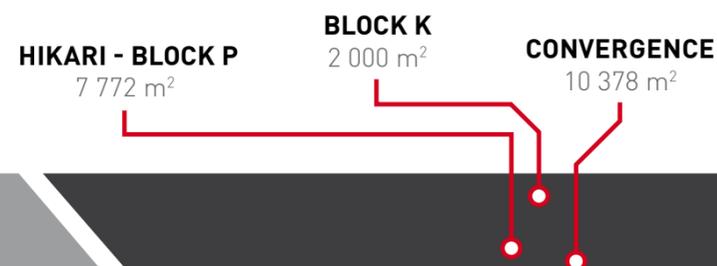
- around railway station and former prisons
- 15 ha
 - 126 000 m² net floor area
 - 5 000 university students by 2015

230 - 250 €/M²/YEAR
NEW CONSTRUCTION PRIME RENT



POSITIVE VIBRATIONS FROM BLOCK P

Emblematic of the new quality of city provided by the Lyon Confluence area, block P will house 3 positive energy buildings. The technological support of Nedo (Japanese Energy Efficiency Office) will encourage a moderation in energy consumption without compromising comfort. A smart grid will allow the control of energy in an optimised way scaled to the three buildings. The 12 000 m² project has been designed by the architect Kengo Kuma, and developed by Bouygues Immobilier associated with SNC-Pitance.



ESPLANADE FRANÇOIS MITTERRAND

LYON CONFLUENCE
PROGRAMMES

2013

2015

2020

LYON GERLAND, THE FACTORY OF EXCELLENCE

The historic area of the Lyon Industry,

Gerland offers an attractive location, basing its development on a dynamic economic mix of life sciences and tertiary diversification. A desirable area, Gerland is also a lively neighbourhood which hosts many of the city's large events.

INTELLIGENT

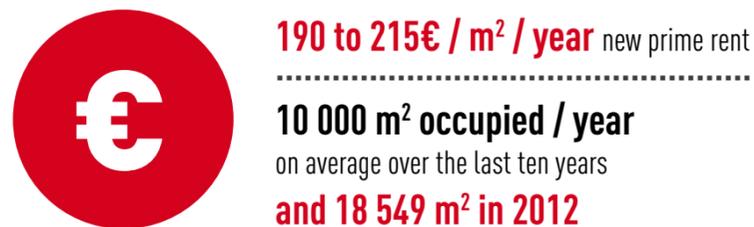
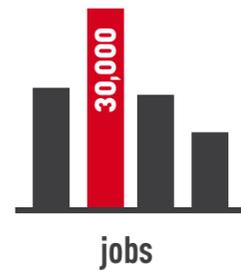
Formerly the industrial district, Gerland knew how to negotiate the innovation curve and cultivate its character as an innovative and productive quarter. Supported by an ambitious urban project, the area offers a wide variety industrial and tertiary companies and attracting a growing number of innovative small and medium-sized businesses. From research to production, Gerland hosts life-science organisations around the Biopôle to boost its internationally recognised expertise.

ACCESSIBLE

Located at the southern entrance of Lyon, in close proximity to the ring road and the motorway, Gerland offers a unique accessibility. Connected to all the main routes, the area is also directly linked to the Part-Dieu Railway station by the Metro line B. In 2014, the extension of this line to the south of Oullins, and the T1 tramline to the Confluence area, will further strengthen the connection between neighbouring areas and the Jean Macé public transport hub, which opened in 2009.

LIVELY

Gerland benefits from a social and professional mix reflected by its economic dynamism and a steadily increasing population. With large facilities for both cultural and sporting events, Gerland is bordered by the second biggest urban park in the city along the banks of the Rhône. A real alternative to the Part-Dieu district, the dynamic of development and innovation in Gerland offers businesses genuinely attractive services at very competitive costs.



LYON GERLAND: Main projects

KEY

PHASING

-  Existant
-  Under construction
-  Planned
-  Domilyon delivered ACCINOV Nov 2013 IRT 2017
-  Raymond Barre bridge 2014
-  Ambre & Opale 2013/2014
-  PUP Aguetant 2014
-  Plastic Omnium 2015
-  Ilot Fontenay
-  Séven 2015
-  Gecina private operation 2015
-  Pont des Girondins
-  Le RUBIK 2015
-  Biopôle

OTHER

-  Greenery
-  Recreational and commercial centre
-  Multimodal hub

TRANSPORT

-  Motorway
-  Road
-  Railway
-  Metro station
-  Tramway station
-  Tramline
-  Planned tramline
-  Planned metro line



GIRONDINS URBAN DEVELOPMENT ZONE

The 17.5 hectares of the Girondins urban development zone provide opportunities for investors and developers to deploy varied large-scale projects. This area, which is one of the last remaining major redevelopment sites in the heart of the city, already hosts tertiary activities and alongside the Ambre programme, offers 12 500 m² available in 2013.

70 000 m²
of net floor space for
tertiary development,
and 30 000 m² available in 2015

2 600
for housing
and 7 000 m² for shops
and businesses

AMBRE
12 500 m²
available in 2013

OPALE
12 500 m²
to be dedicated to
La Poste in 2014

OPPORTUNITIES

LYON TECHSUD

100 000 m² of net floor area for technological tertiary development, including 30 000 m² of new real estate available in 2017

OTHER PROGRAMMES

Le RUBIK 8 500 m² available
16 months after signing

SUNWAY 6 900 m² available

GERLAND BIOPÔLE, AN AREA OF GLOBAL REFERENCE FOR HEALTH AND BIOTECHNOLOGY

Leading in the world rank,

Gerland's LyonBiopôle continues to grow with two major assets: the presence of leading global players and a promising urban project. In a same dynamic, the Biopôle unites academic roles, higher education institutions, centres of excellence and private businesses, covering all the links of the value chain, from research to the commercialisation of innovative health products. LyonBiopôle hosts as many research and production sites as company headquarters.



THE APPEAL OF A TOP-CLASS URBAN CAMPUS

LyonBiopôle builds on the model of an urban campus, offering an attractive environment and lifestyle to its diverse audiences by mixing a vast range of services (catering, sport, culture...) and high quality urban and landscape facilities (in close proximity to Gerland Park...). In addition, the densification and meshing of its professional network seeks to create an "environmental effect" by encouraging creative exchange: an open innovation platform, a place for exchange and conferences... Naturally, its land reserves allow for new development opportunities for investors and users.

AN ENRICHED VALUE CHAIN

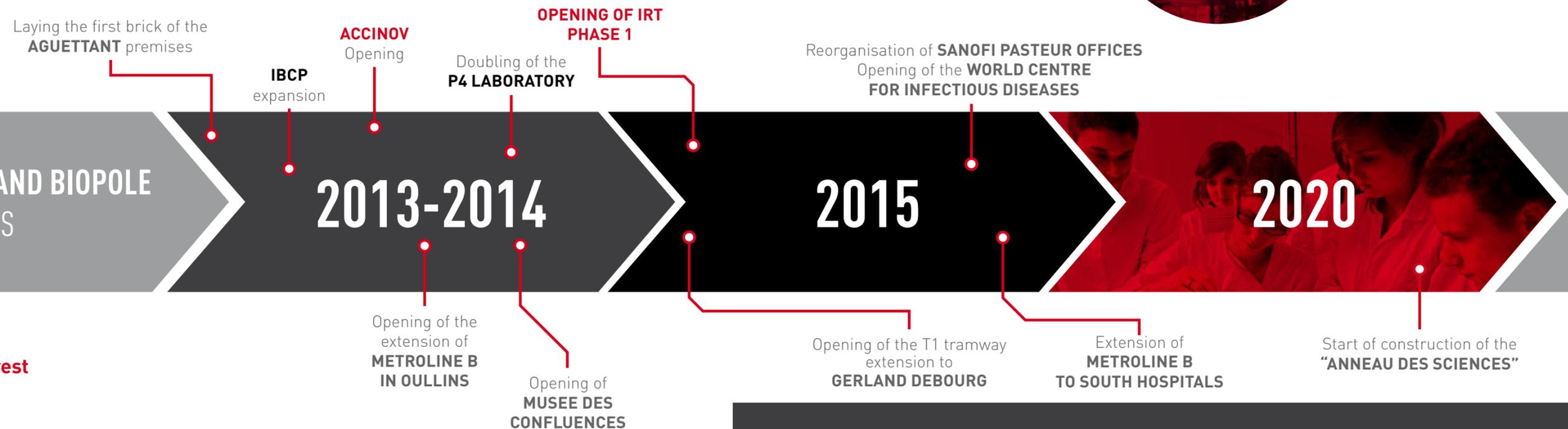
With incubators for start-ups, business parks for small and medium sized businesses, "headquarter" properties for key accounts, the draw of this project has already seduced world-renowned experts (Sanofi Pasteur, Merial, Genzyme...) and innovative small and medium sized businesses (Aguettant, Episkin, Genoway, Imaxio...) around its excellent facilities. The Biopôle is asserting its vocation as an international centre allowing the implementation of large companies, new professional links or even research centres dedicated to ground-breaking subject areas:

- the acCInov innovation platform will be delivered in 2013,
- the first brick of the all-new 30 000 m² development hosting the Institute for Technological Research in Infectious Diseases (phase 2) will be laid in 2017,
- The World Centre for Infectious Diseases is scheduled for 2020.

BIOPÔLE



THE GERLAND BIOPOLE MILESTONES



Industrial
Academic
General interest



Headquarters of the **Ecole Normale Supérieure in Lyon**, Presence of the University of Lyon.



Several research institutions (CIRI, IGFL, IBCP, EISBM, INSERM...)

CIRI: International Centre for the Research of Infectious Diseases
EISBM: pean Institute for Systems Biology and Medicine
IBCP: Institute of the Biology and Chemistry of Proteins
IGFL: Institute of Functional Genomics of Lyon
INSERM: National Institute of Health and Medical Research

GERLAND, THE TRADITION OF INNOVATION

A historical anchoring...

- Creation of the Mérieux Institute in 1897 by Marcel Mérieux
- Headquarters of Sanofi Pasteur, the largest private employer in the metropolitan area: 6 700 jobs
- 5 000 jobs in the health industry, 2 000 researchers
- Headquarters for the global cluster LyonBiopôle

Local and global ambition...

- LyonBiopôle, an industrial engine, boosting the economy of Greater Lyon
- Greater Lyon, an area recognised as a prime example on the global map thanks to the Biopôle.
- The 'life-sciences' branch at Gerland: an economic project within a mixed and welcoming urban environment

LYON CARRÉ DE SOIE, A NATURAL RESERVE OF OPPORTUNITIES

A major urban project in the east-central area of the city, The Carré de Soie offers vast opportunities for development in terms of investment and positioning between the city and the natural environment. A multi-sector urban redevelopment programmed around a public transport hub, for an area connected to the future.

FERTILE

A short distance from the Miribel-Jonage Park, one of the largest natural outer-urban spaces in Europe, the Carré de Soie area is naturally connected to key strategic areas of the city by public transport. This attractive accessibility, combined with the size of land available for investment is a sure sign of its fertility.

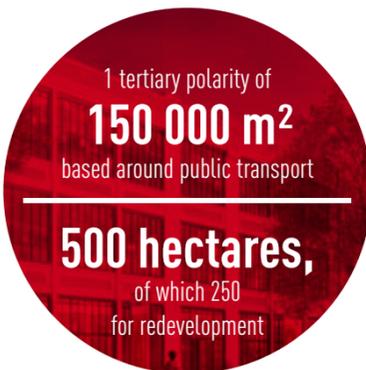
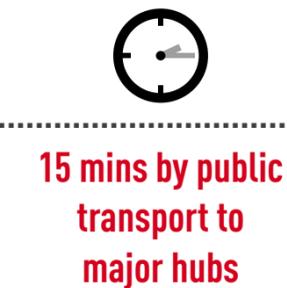
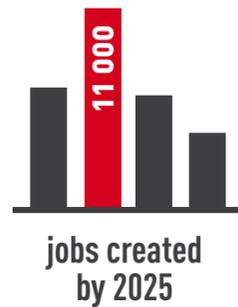
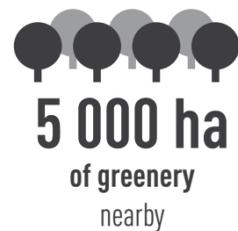
MULTIPLE

The Carré de Soie is already affirming its mixed vocation. With its business and leisure centre, the largest multiplex cinema in the region and the mixture of tertiary buildings and committed housing, the urban transformation has already begun.

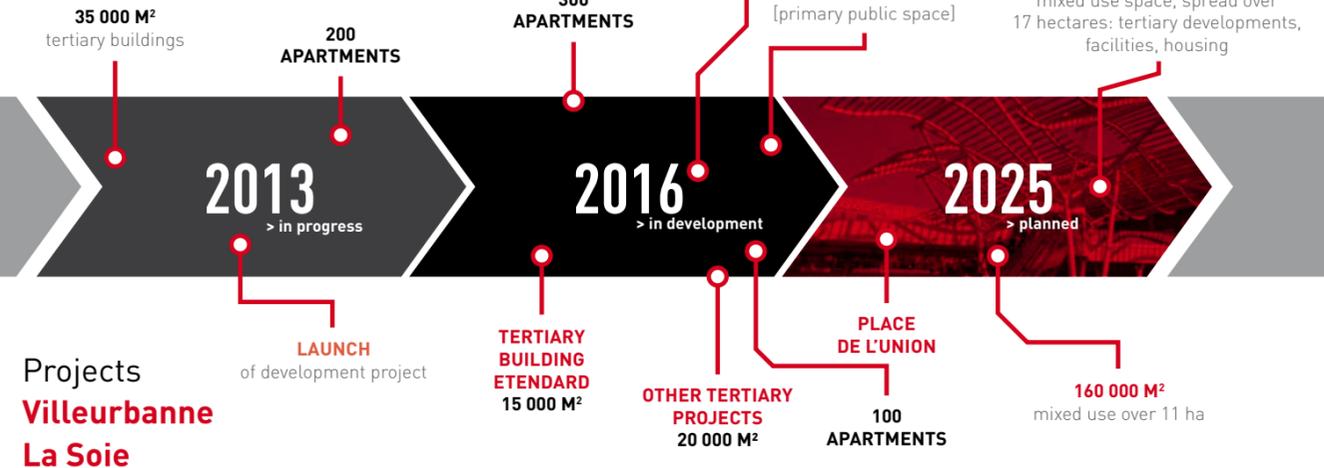
Sustainably welcoming, the Carré de Soie district will be resolutely diversified.

REGENERATED

Over the next generation, the Carré de Soie will offer genuine quality of life: between the conversion of heritage buildings as seen at the Tase factory and positive energy buildings such as WOOPA, the area naturally attracts cleantech businesses and key players in the cooperative world. A history in writing for an area to invest in...



TASE Sector projects



KEY

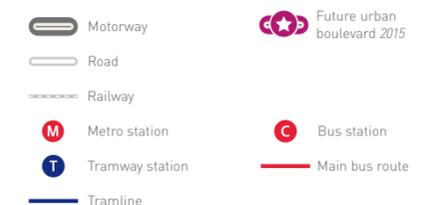
PHASING



OTHERS



TRANSPORT



Pioneer of the urbanisation of the sector in 1924, and listed as a historical monument since 2011, this former artificial silk factory is emblematic of the project. Led by Bouwfonds Marignan, the conversion of one of its buildings into echnip offices embodies the spirit of the Carré de Soie.

THE TERTIARY HUBS

LYON VAISE INDUSTRY, THE DIGITAL HUB OF THE CITY



■ WELCOMING

Lyon Vaise offers businesses high quality establishments and a very pleasant working environment to their employees. Steps away from the Saône, tertiary properties enjoy an exceptional natural environment, from the panoramic views of the banks of the Saône to the tree lined hills. From 2015 the development of the Saône will offer walkways and pedestrian / cycle paths to both the Val de Saône and Lyon city centre. In terms of services offered, the multiplex Pathé cinema, I-way and numerous restaurants make Lyon Vaise a lively area, day and night.

■ DIGITAL

Lyon Vaise establishes itself as the number one site of digital activity in the city hosting leading companies in software publishing, computer engineering and video gaming. Naturally, support activities such as communication, marketing, human resources, banking and insurance have settled in numbers, enriching this tertiary dynamic. Since 2012, a business incubator specialising in digital activities and managed by Cluster Edit welcomes innovative small and medium-sized businesses who are taking full advantage of the emulation of this competitive innovative quarter.

■ CONNECTED

Close to the city centre and perfectly linked, the Vaise area is the gateway to the Val de Saône. The north ring road offers quick and direct access to the A6 and the A7 motorways. From 2013, the opening of the Croix-Rousse tunnel with its dedicated liaison for soft mobility will offer even more travel options to users of the public transport hub at Vaise Station (the Metro line D, regional trains, bus station). In 2014, the completion of the new Schumann Bridge will strengthen the connection between the city centre and the Lyon presqu'île.

GREENOPOLIS, A NEW BUSINESS PARK IN LYON VAISE

FOCUS



■ OPPORTUNITIES

An urban project focussing on sustainable development and quality of life, Greenopolis is today one of the few projects that give access to the acquisition of city centre property. Supported by the developer em2c, this mixed activity park comprises the conversion of a former industrial holding. With three rehabilitated and seven new buildings for rent or purchase, the programme is connected to the free zone of La Duchère. The set-up of fifteen businesses, such as La Plateforme du Bâtiment or Password is testament to the attractiveness of Greenopolis and emphasises its mixed vocation of offices, business and trading.

21 500 m²
of space of which:

8 674 m² is dedicated to offices and a business village
12 238 m² to trading and commercial activity
277 parking spaces, 179 of which are underground.

7 NEW BUILDINGS / 3 RENOVATED BUILDINGS

COMPLETION: END OF 2013



i OPTIMUM ENVIRONMENTAL QUALITY

The developer em2c has taken special interest in the environmental dimension of this programme in all aspects of the building:

- natural lighting and solar protection
- centralised heating and cooling, thanks to a wood-fuelled boiler coupled with an absorption chiller.
- a roof garden reinforcing insulation, reusing collected rain water.

THEY HAVE CHOSEN VAISE

■ COMPANIES

Digital:
Electronic Arts, Namco Bandai Partners, Logica, Akka Technologies

Services:
Cegid, Apicil, Groupama, Solutec, Audigier, KPMG, Orange, Bayer, SQLI

■ LEISURE

Multiplex Pathé cinema, I-Way

Recent completions:
• Rives Numériques 6 000 m²
• L'Adresse : 5 700 m² by Vinci
• Espace 50:
- ThPE office building,
- Lyon Ouest 4 000 m²,
a 3* hotel with 102 rooms (Métropole group)
- Quai 50 restaurant, with Italian specialities

Arriving in 2013:
• UniverSaône: 12 500 m² of tertiary rental space
- Developed by Fyiling
- 1st User: FIDAL on 3 000 m²

2015:
Development of the Saône river banks

5 years from now:
• 50 000 m² of planned tertiary property
• 650 homes, shops and businesses planned in the heart of the area

VILLEURBANNE, GRANDCLÉMENT, THE DEVELOPMENT PROGRAMME

LYON 7 THE CITROËN BUILDING

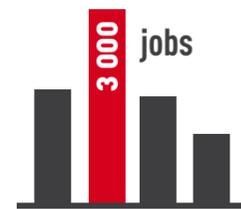


Formerly the town centre of Villeurbanne
before moving to the Gratte Ciel in 1934, the area of Grandclément has a variety of commerce and services (an inter-company daycare centre, broadband...).



Its enviable location and excellent public transport connections place this area just minutes from the Part-Dieu, 30 minutes from Lyon Saint-Exupéry airport as well as the heart of the city. It is adjacent to the Laurent Bonnevey ringroad and the major motorways.

Building on the success of Pôle Pixel, Grandclément is revealing itself as a strategic location, hosting major accounts such as: ALSTOM Grid, Schneider Electric, Vinci Construction, SCHINDLER, AVIVA and Atos Worldwide.



8 business parks

70 hectares
for economic development

A dense public transport service:
T3-C3 / Rhônexpress, Vélo'v...

390
institutions

Projects in development
50 000 m² of tertiary property under construction
Public green space in the heart of the proposed area.

**i PÔLE PIXEL:
A CENTRE FOR IMAGE AND SOUND
AND FOR THE INNOVATION OF CREATIVE INDUSTRIES!**

60 Cinematic, audio visual, video gaming, web and new media enterprises covering 16 000 m²; today, these are flattering figures which describe Pôle PIXEL.

Supported from the start by the Rhône-Alpes region, Greater Lyon and the city of Villeurbanne, Pôle PIXEL houses the Imaginove cluster and Rhône-Alpes Cinéma, the regional co-production fund for the financing and promotion of feature films produced in the Rhône-Alpes region (www.rhone-alpes-cinema.fr).

Pôle Pixel, the prime regional centre and a key operator buzzing with creativity and innovation in the Rhône-Alpes offers enviable hosting conditions:

- The PIXEL Enterprises Business hotel,
- A post production auditorium,
- A laboratory for digital restoration,
- 3 film studios,
- A film school and a restaurant.

www.polepixel.fr

■ A LISTED BUILDING

Situated in the **Guilottière area**, on the left bank of the Rhône, within walking distance of the Universities, the Citroën building is an institution in Lyon. This Art Deco masterpiece, was, at the time of its construction, the largest 'service station' in the world. This ambition is reborn in a tertiary renovation led by developer 6^{ème} Sens and artistic designer Jean-Yves Arrivet.

■ A HIGH-END DEVELOPMENT

The demand for quality development is the driving force behind the overall quality of this programme; with BREEAM certification, compliance with enterprise resource planning regulations (ERP) and with accessibility, the three plateaus of over 4 000 m² aim to offer great flexibility, and to cultivate the warmth and openness of the building. More than a settlement opportunity, the Citroën building is an invitation to make history.



10 minutes by public transport from the Part-Dieu train station and the Presqu'île area.

BUILDING PERMIT TO BE CONFIRMED IN MARCH 2013

**DELIVERY:
END OF THE 2ND SEMESTER 2014**

15 000 m²
of offices
divided into three 5 000 m² spaces
235 € / m²

PRESQU'ILE HOTEL DIEU



The Eiffage / Intercontinental / Didier Repellin / Albert Constantin

teams won the consultation for the redevelopment of Hotel Dieu, with a prestigious project offering this building an exceptional new lease of life covering more than 64 500 m² of net floor area. Between international appeal and enriching the range of commerce and local services, Hotel Dieu proposes to exhibit its architecture and heritage as the largest monument in Lyon by combining its amenities:

- Stay: An inter-continental hotel of around 140 rooms
- Exchange: A convention centre, complementing the existing venues in the city
- Work: Prestigious and functional tertiary location solutions for service companies
- Escape: Relaxation spaces and discovery of the existing gardens and courtyards
- Temptation: New shops on the ground floor, in the heart of the city
- Discovery: The Cité Internationale of gastronomy, concentrated into 3 500 m² split over three integrated functions (a museum, learning centre for the gastronomy trade and a resource centre) and developed around a journey of taste consisting of businesses and restaurants in synergy with the hotel and conference centre.

START OF CONSTRUCTION IN 2013

**COMPLETION SCHEDULED
FOR 2016**

Planning of
64 500 m²
net floor area including:

Luxury hotel: 21 000 m² net floor area

Convention centre to hold
from 300 to 500 seats

Shops: 16 000 m² net floor area

Overall tertiary space: 15 000 m²
net floor area including 10 700 m²
of new construction

International centre of Gastronomy
3 500 m² net floor area

Underground parking: 260 spaces

PRESQU'ILE CONVERGENCE



■ **ULTRA CENTRAL AND CONNECTED**

Situated between the eco area of the confluence, a major urban project, and the historic Presqu'île, Convergence is at the heart of the nerve centre of Lyon. Convergence is directly connected to the main routes of the city, and situated at the centre of a multimodal crossroad with direct access to the A6 and A7 motorways and is close to Perrache railway station, uniting the TGV/Railway/Bus and Metro transport modes.

■ **A HERITAGE TO INVEST IN**

Convergence is part of La Vie Grande Ouverte, a global revaluation project for the Saint-Paul and Saint-Joseph blocks, formerly Lyon prisons. Seen as an ensemble, the programme combines living, greenery, and work spaces with comfort, functionality, relaxation, reflection and quality of life. With offices certified as "High Environmental Quality" (HQE), the program promises low energy consumption for maximum comfort.

**COMPLETION:
4TH TRIMESTER OF 2014**

37 000 m²

occupied by the Catholic university

**3 connected mixed-use buildings
for businesses, housing
and offices**

11 300 m²

One 6 100 m² lot

One 4 300 m² lot

A 900 m² heritage building

MIXED-USE HUBS

WEST ECONOMIC CENTRE

EXCEPTIONAL QUALITY OF INFRASTRUCTURE AND WORK

Situated in the northwest of Lyon,

the west economic centre is immediately accessible from the north ring road, the A46 and the A6 motorways. The site is also linked to the multimodal hub at the Vaise railway station by the bus "Techlid express". This service connects the centre to the entire city thanks to the network "Ferroviaire Express de l'Aire Métropolitaine Lyonnaise" (Metropolitan Lyon express railway). With a varied range of locations, the west economic centre attracts businesses with its residential potential and the quality of its environment.



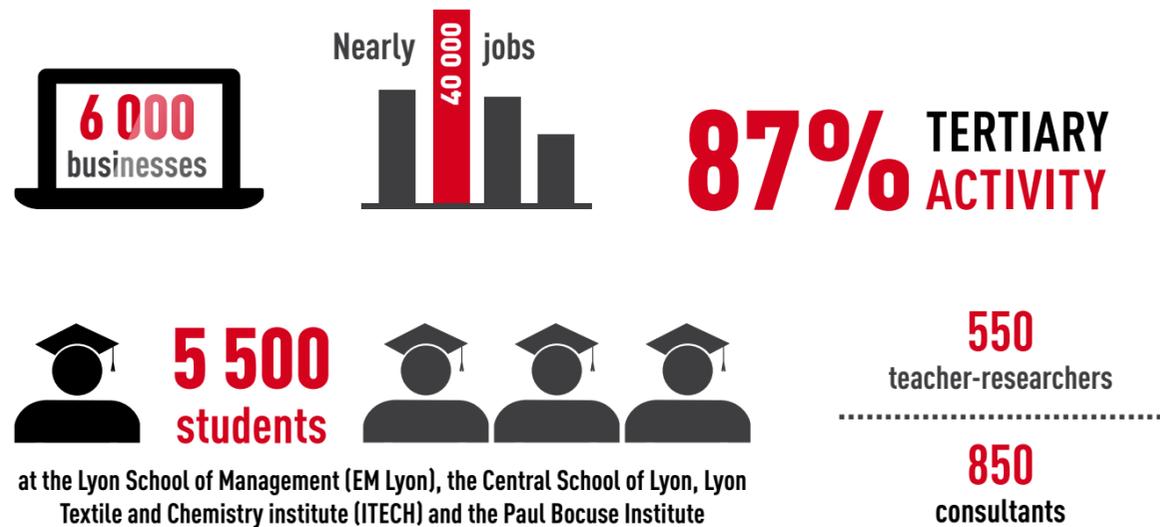
WORK GREEN, LIVE GREEN

The centre is organised around Techlid,

that ensures the support, promotion and economic development of seven communities: Champagne au Mont d'Or, Charbonnières les Bains, Dardilly, Ecully, La Tour de Salvagny, Limonest et Tassin la Demi-Lune.

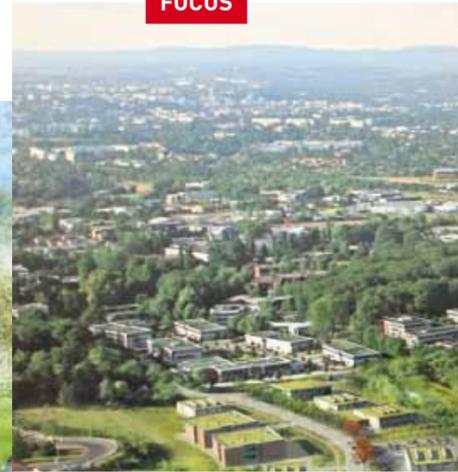
Partner structures like the chamber of commerce and industry (CCI) or the association of business owners participate in the growth of the city's second centre of employment.

Famous for its natural living environment and qualitative high value, the site is organised to facilitate the life of businesses and their employees: selective waste collection, human resources, broadband telecommunication networks, inter company daycare centre, concierge, occupational health centres, hotels, restaurants, and some 600 shops in the city centre and surrounding shopping centres.



PUY D'OR - LIMONEST BUSINESS PARK

FOCUS



The park Puy d'Or is made up of 21 hectares, a large-scale real estate development for the west Lyon economic centre (Techlid), the second-largest employment centre of Lyon. Located in a high-quality environment, this business park combines accessibility, lush landscaping and services.

COVERING 13 HECTARES A MIXED USE, FULLY SERVICED, TERTIARY SECTOR PARK

Divided into 14 lots representing 13 available hectares, Puy d'Or business park is dedicated to the hosting of tertiary activities along the RD 306 (ex/formerly N6) and other mixed activities (70% tertiary / 30% activities).

Developed by SERLQimmo2, a subsidiary of the SERL group, a nearby service centre complements the existing offer with a restaurant and a daycare centre. Focused on the enhancement of existing natural heritage, the development of the business park and the property programmes cultivates environmental integration and architectural quality.

BY 2015, ULTRA HIGH SPEED BROADBAND

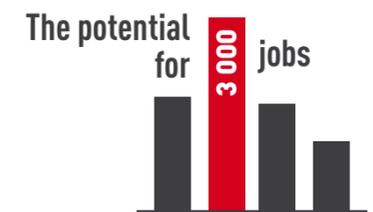
Puy d'Or business park is one of 10 priority operations in the urban community that hoping to implement a fiber optic network destined for businesses: by 2015, Puy d'Or park will be entirely fiber optic-equipped.

EVEN MORE ACCESSIBLE

The business park is accessible via the A6 motorway, exit Techlid economic centre (n°34). It is situated in along the departmental road 306 (formerly N6). During rush hour, the bus n°6 serves the park from the Vaise multimodal hub every 10 minutes, connecting it to the Lyon metropolitan rail network. Note that two additional stops at the heart of the site were decided in consultation with the SYTRAL (The mixed syndicate for Transport in the Rhône and surrounding Lyon area).



LEFT TO BE COMMERCIALISED: 29 400 M² CONSTRUCTABLE AREA (SDP)



THEY HAVE ALREADY CHOSEN THE PUY D'OR PARK



AN EXPANDING AREA IN THE EAST OF LYON

With 1 450 hectares of surface area,

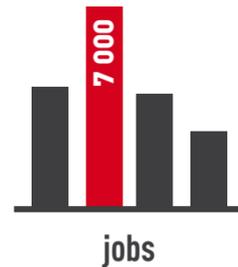
Portes des Alpes has great potential for investors seeking large territories on the outskirts of the agglomeration. A space both strategic and welcoming, it benefits from a strong dynamic of economic and population growth, and is home to two large development projects: the Saint-Priest technology park and the Urban'East Park.

SAINT-PRIEST TECHNOLOGY PARK, RECOGNISED QUALITY

Over the last ten years, the Saint-Priest Technology park has developed an innovative and sustainable development concept over 140 hectares, growing the economy, ecology and social dimensions. Welcoming businesses with high added value in such specialised industry sectors as biotechnology, environmental science and IT, the park has received a Local Public Enterprise (EPL) award.



Saint-Priest technology park



THEY HAVE CHOSEN THE TECHNOLOGY BUSINESS PARK

- **biotechnology and health:**
Depuy France - Johnson & Johnson group, Merial - Sanofi, Mylan
- **environment:**
Gamesa Energie France, SMA France
- **industrial engineering:**
Schneider Electric, Irisbus, Linde Gas, Siemens, Mitsubishi Electric, ABMI, Somfy, Alfa-Laval, Assystem
- **services:**
Cap Gemini, Sully Group et Intrum Justitia, SFR, France Telecom Ecodime, Cirtil
- **la Cité de l'Environnement**
The first positive energy office building in France unites in one place key roles (urban planners, architects, developers, consultants, contractors...) with recognised expertise in environmental quality within the urban planning domain.

1 4* HOTEL



Situated in close proximity to the Lyon-Saint Exupéry and Bron airports, this area is connected to the city centre by the **T2 tramline and bus 93**. It is also directly connected to the ringroad, the A43 motorway and the Rocade Est.

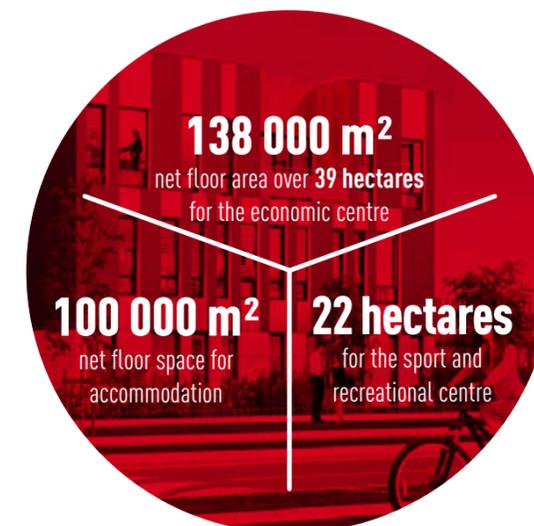
URBAN'EAST BUSINESS PARK A NEW BOOST FROM THE DYNAMIC EAST

FOCUS



To complement the Saint-Priest technology park, the Urban'East business park offers significant surface area for growing businesses. Currently under development, the Urban'East business park is becoming a crucial element to the future of the eastern metropole, offering turnkey projects, for tertiary or mixed use.

Nearly 100 hectares, including:



CONNECTED BY NATURE

Directly linked to the major circulation routes (A43 and rocade est), the site is served by three bus routes linking to the multimodal hub at Vénissieux, via the metroline D, the T4 tramline T4 and the regional railway.

In terms of service and the environment, the site is adjacent to Parilly Park, one of the largest parks of the agglomeration, in close proximity to the Eurexpo exhibition centre and several commercial zones

DES GAULNES BUSINESS PARK

MEYZIEU JONAGE



LYON-SAINT EXUPÉRY AIRPORT

AN ECONOMIC DYNAMIC IN BUSINESS CLASS



The Des Gaulnes business park, an extension of the Meyzieu industrial zone, is located in the communes of Meyzieu and Jonage in the east of Lyon. The site offers a large surface area equipped for industrial, tertiary and logistics activity, already attracting more than 21 businesses. The latest arrivals, Campus Véolia, the Electricity Transmission Network (RTE) training centre and Würth Elektronik, all confirm the appeal of this well-linked site.



A leading multimodal platform, Lyon Saint-Exupéry airport hosts a multitude of commerce, services, businesses and activities. With direct and day return flights available for all major European cities and the arrival of a third terminal dedicated to low cost traffic in 2011, the option to travel by air is strengthened; just like the connection to the city centre with the direct express link "Rhônexpress" which puts the Part-Dieu and the Presqu'île at 30 minutes reach. These are optimal conditions for the galvanisation of the real estate operations involved. The aim is clear: to offer the city an efficient and attractive "cityairport" which acts as a gateway to the world.

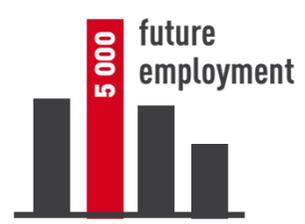
PROPERTY AND REAL ESTATE OPPORTUNITIES

- REAL ESTATE:**
- A space of between 5 000 and 15 000 m² dedicated to small and medium-sized businesses
 - Large plots of more than 20 000 m²

- PROPERTY FOR RENT OR PURCHASE:**
- SUNSTONE business park 5.7 hectares developed by Bouygues Immobilier,
 - A 6 hectare mixed-business park, including 2.3 hectares available for acquisition (NACARAT) and 3.7 hectares for rent.

SERVICES AND QUALITY OF LIFE

- With a landscape** that spans the site from north to south offering a "soft" pedestrian/cyclist link, the pastoral development of Des Gaulnes park offers enviable working conditions. Companies and their employees can rely on a wide range of useful services available from within the business park itself.
- An inter-company restaurant "La Parenthèse",
 - A dynamic business association
 - 34 cots in the inter-company daycare centre
 - A Kyriad*** hotel under construction in the SUNSTONE business park,
 - 15 hectares of landscape.



CONNECTED, MULTIMODAL AND WELCOMING

A multimodal aerial (with direct flights to more than 115 destinations), railway (high-speed TGV trains) and road (motorway junctions A6, A7, A42, A43) platform, the airport offers businesses the potential of unique exchanges in Europe. The dedicated TGV station, putting the airport at less than two hours from the centre of Paris, will be connected to the European express freight rail network EuroCarex, and in the future, to Turin, Italy. At a regional level, the airport has quick and easy connections to the Loire, Ain, Drôme departments, the north of France, Paca, south Bourgogne and Turin with the regional railway. It is less than 30 minutes from Part-Dieu with the "Rhônexpress". These connections are part of a policy orientated towards sustainable development and has linked the onsite businesses for more than 10 years. Thanks to a large range of shops, services and catering facilities and an inter-company daycare centre, the airport hub is also a lively working space for the 5 300 employees of the 200 businesses located on the site.

LYON - SAINT EXUPÉRY: A VAST CHOICE OF LOCATIONS AND INVESTMENTS

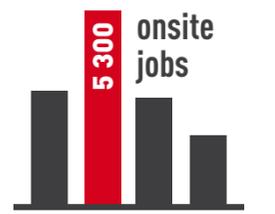
Thanks to a real estate reserve of 900 hectares, unique to France, more than 40 000 m² of rentable floor space and more than 200 000 m² of land, Lyon Saint-Exupéry airport offers opportunities for demanding investors, developers and users: the DB-Schenker group, ranked n°2 in international transit has already brought its activity to Lyon-Saint Exupéry, in a 20 000 m² set-up.



More than a hundred national, European and inter-continental destinations



5 300 onsite jobs



i ACCESSIBILITY

30 minutes from the centre of Lyon and 10 minutes by public transport (tramline T3 and the Rhonexpress) from Lyon-Saint Exupéry airport and its high-speed railway station, the site is also linked by the A46, several bus routes and the shuttle bus ZI 2 and has 450 parking spaces.

A DYNAMIC SUPPORTED BY COMPLIMENTARY OPERATIONS:

- A tertiary business hub situated within walking distance of the terminals offers:**
- 10 000 m² of offices,
 - 4* Hotel with 245 rooms and suites,
 - A 2 000 m² business and conference centre
 - 50 parking spaces

- Supported by the CFA Rhône Alpes group, the development and commercialisation of a real estate programme, Airparc offers 6 hectares situated at the southern entrance of the hub with 29 500 m² of net floor area comprising:**
- A mixed business park of offices and activities of approximately 18 500 m² net floor area with 660 parking spaces,
 - An aeronautical training centre operated by the society Air Campus Simulflight Centre, with approximately 11 000 m² net floor area and 215 parking spaces.
 - Hotel Ibis Budget and Hotel Kyriad 2*

CITY COMMUNITY PORTE DE L'ISERE

A TERRITORY TO INVEST IN



Major economic centre of the Lyon metropolis, the community of Porte de l'Isère (CAPI) has in its immediate vicinity Lyon Saint-Exupéry airport and TGV station, with opportunities for investors, promoters and users.

TECHNOLOGY AND INNOVATION IN NORTH ISÈRE

THE PORTE DE L'ISÈRE TECHNOLOGY PARK

is a major metropolitan centre of activity dedicated to state-of-the-art industry and to value added services. It offers diverse installation possibilities both in real estate, tertiary and multi-use development.

ASTUS construction, a centre of innovation for sustainable construction

accredited by the 'Grenelle Bâtiment-Energie Plan', has installed itself in close proximity to the technology park. It guides businesses in their product development, services and innovative process projects in the assembly sector.

With the availability of technology exchanges (a 1 000 m² testing centre, laboratories, workshops, exterior demonstration spaces), advice/expertise, training services, awareness and prospective planning, ASTUS construction is a real catalyst of innovation.

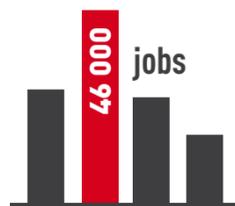
ASTUS Construction also hosts an incubator for innovative companies and has 2 hectares available for tertiary projects.

THE NORTH ISÈRE INNOVATION PARK

located in the extension of the technology park, offers a new high-tech home for industrial, research or service activities in the eco-technology domain (sustainable construction, materials, new energies, environment)



including 270 with more than 20 employees



Porte de Isère technology park:
• 10 hectares of land available
• Tertiary programmes and mixed Airstream and Business Campus. delivery 2013 & 2014

ASTUS Construction:
2 hectares of real estate available for tertiary vocation

Chesnes international park:
• 1 land-based logistical business park with more than 2 million m² of logistics industries
• Renowned international institutions: Lafarge, Parex Group, Valeo, Aenova, Martinet Traiteur

Médipôle :
• 4 hospital structures, 700 beds and 1 500 employees
• 11 000 m² high environmental quality net floor area for tertiary development (HQE) (Synergy)
• 13 000 m² of net floor area over 2 blocks dedicated to health sector activities

2nd

CENTRE OF EMPLOYMENT IN THE ISÈRE DEPARTMENT

LA PLAINE DE L'AIN INDUSTRIAL BUSINESS PARK

HIGH ENVIRONMENTAL QUALITY AT THE GATEWAY TO LYON



And if it were possible to combine economic performance, industrial know-how and quality of life within a truly innovative industrial park?

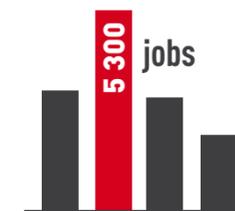
The first European industrial park to be certified ISO 14001, subscribed to EMAS (eco management audit scheme) and LUCIE (social responsibility in business) accredited for its environmental management and its commitment to social responsibility, this industrial park has developed 330 hectares of viable real estate, and is immediately available.

Situated 35 minutes from Lyon and 25 minutes from Lyon-Saint Exupéry Airport, this business park benefits from the dynamics of the metropolis and its key players, while offering exceptional living and working conditions. Developed around three strategic areas, the protection of the environment, control of the rhythm of commercialisation and the diversification of activities, today the park counts over 130 businesses covering nearly 900 hectares.



AN ACTIVE BUSINESS PARK BY NATURE

- A group of dynamic and entrepreneurial businesses
- Multiple services: mutual benefit contracts, catering, temporary work agencies, a travel agency, a 3* hotel, occupational health centre, car garage, fuel station, aquatics centre.
- A culture of well-being for its employees with drama/theatre workshops and a choir.
- ... and a polo club.

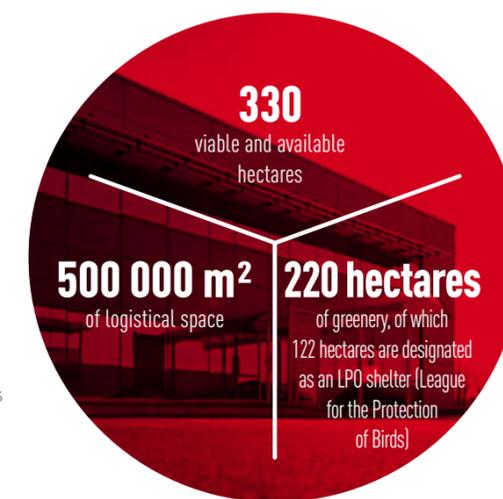


YEARS OF EXPERIENCE AND INNOVATION AT THE SERVICE OF BUSINESSES

To meet the most specific needs of industry, the Plaine de l'Ain industrial business park has continuously developed and maintained efficient facilities:

- fiber optic networks
- divided EU/EP/AEP networks
- water collection system
- STEP,
- drinking water reserves
- etc.

In developing a business incubator and office rental, workshop and logistic warehouse offers, the business park adapts itself to the current and future needs of each business. Its 330 hectares of available real estate make for one of the biggest real estate reserves in the Lyon region today.



CONTACTS

GENERAL INFORMATION

Greater Lyon

Business services branch
20 rue du Lac - BP 3103
69 399 Lyon Cedex 03
www.business.greaterlyon.com

Émilie Mollard and Sébastien Delestra

Tel. : +33 (0)4 78 63 46 57

WEST ECONOMIC HUB, PORTE DES ALPES, RHÔNE AMONT, GRANDCLEMONT:

Emmanuelle Boucheron

Tel. : +33 (0)4 78 63 49 85
eboucheron@grandlyon.org

Hajo Bakker

Tel. : +33 (0)4 26 99 39 29
hbakker@grandlyon.org

LYON PART-DIEU

Fabien Guisseau

Tel. : +33 (0)4 26 99 39 64
fguisseau@grandlyon.org

LYON CONFLUENCE

Tel. : +33 (0)4 78 38 74 00
info@lyon-confluence.fr

LYON CARRÉ DE SOIE

Tél. : +33 (0)4 69 64 54 00
carredesoie@grandlyon.org

LYON GERLAND

Audrey RUT

Tel. : + 33 (0)4 37 65 39 10
arut@grandlyon.org

PUY D'OR AND UD DES GAULNES

SERL

4 boulevard Eugène Deruelle
BP 3099
69 398 Lyon Cedex 03

Anne-Marie Merle

Tél. : +33 (0)4 72 61 50 22
am.merle@serl.fr

Marc Vouillon

Tél. : +33 (0)4 72 61 50 30
m.vouillon@serl.fr

www.serl.fr

LYON AIRPORTS

BP 113
69 125 Lyon-Saint Exupéry
Aéroport - France
www.lyonaeroports.com

Hervé Tardy

Tél. : +33 (0)4 72 22 73 43
herve.tardy@lyonaeroports.com

MIXED SYNDICATE PLAINE DE L'AIN

Mixed syndicate Plaine de l'Ain

www.plainedelain.fr

Émilie Brot-Viounnikoff

Tel. : 33 (0)4 74 46 54 17
emilie.brot@plainedelain.fr

NORTH ISÈRE TERRITORY

Service économique

17 avenue du Bourg
38 080 L'Isle d'Abeau
www.capi-agglo.fr
Tel. : 33 (0)4 74 27 69 13
economie@capi38.fr

ADERLY AND GREATER LYON, AVAILABLE PARTNERSHIPS

Are you a small / medium-sized business or a large company in search of property? Aderly (Agency for Economic Development in the Lyon Region) and Greater Lyon are at your disposition to help facilitate your project. For all your needs, a personal consultant will guide in your research for opportunities, and will help you make the choice that best suits you.

Are you are a French or foreign company wishing to install your business in the Lyon region? For support with paperwork, assistance with your specifications, selection of sites tailored to your specific needs, recruitment of future employees and managing their mobility... Aderly is at your side accompanying you throughout your project, putting you in touch with local decision makers, the business community, press and other local stakeholders.

Do you wish to invest or expand in the Lyon area?

Greater Lyon is your liaison for the research of sites or the introduction to real estate professionals. As such, Greater Lyon has developed a master plan to welcome businesses, designed to find real estate and custom solutions adapted to the individual demands of businesses.

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SAENTYS & J'articule

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Sogelym-Dixence-Atelier de la Rize-AIA_
Architectes-Albert Constantin
Valode & Pistre Architectes
L'AUC
Marie Carrier
Jacques Damez pour SPLA Confluence
Cyril Thomas pour Bouygues-Asylum pour
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