



REGIONAL ACTORS MAP

THE MIDI PYRENEES REGION

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I DEFINING THE REGION



Remote heiress of the provinces of the Ancient Regime, the regions developed at the end of the Second World War, when appeared the need to have a geographical framework whose dimension makes it possible to put into place a planning and a real regional development and an economic development policy. Constituted first in the form of a public institute, the Region became, with the implementation of decentralisation laws of March 2, 1982, a territorial organisation, as the commune or the department.

The current Midi-Pyrenees region thus took form from the 1950s, when the territory of France was divided into 22 "programs' regions", provided each one with a regional action plan. Around Toulouse, eight departments are joined together (Ariège, Aveyron, Haute-Garonne, Gers, Lot, Hautes-Pyrénées, Tarn and the Tarn-et-Garonne) which make the biggest region of France.

By its extent, its diversity, its historical richness, its intellectual and industrial potential, Midi-Pyrenees occupies a strategic place at the national and European levels. Around its regional metropolis, Toulouse, Midi-Pyrenees gathers a network of medium-sized cities and zones marked at the same time by their differences and their complementarities.

The national government, helped by local actors, worked out a strategy and means to develop the regional assets: the "**Contrat Plan Etat-Région**" (the Region-State Plan Contract). This is an essential act of decentralisation and regional development.

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Since the decentralisation laws of 1982-1983, the significant choices as regards the regional development are not any more imposed by the State, but they are decided on the level of the 22 French regions by the Regional Councils, within a framework defined by the government. Every four or five years, the government sets the objectives of the economic, social and cultural development at the national level.

Each region works out itself its own regional plan whose main goal is to determine the economic, social and cultural objectives for its own territory. These regional plans fall under a context of co-operation with the State and the other territorial organisations and leave a great freedom of action to the Regions. In Midi-Pyrenees, the "Contrat Plan-Etat-Région" intends to support all the forms of social, economic and territorial innovation which will contribute to the sustainable development and to the development which support the employment, the activities and the territories.

<http://www.cr-mip.fr/fr/htm/mission/contrat7.htm>

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II CHARACTERISING THE REGION

DATAS OF MIDI-PYRENEES



The largest region of France

45 348 km²
8,3 % of the national territory
8 countries
3020 municipalities

Population of the countries

Ariège (09)	137 205
Aveyron (12)	263 808
Haute-Garonne (31)	1 046 338
Gers (32)	172 335
Lot (46)	160 197
Hautes-Pyrénées (65)	222 368
Tarn (81)	343 402
Tarn-et-Garonne (82)	206 034



Cities that own more than 50 000 inhabitants

Toulouse:	863 000
Tarbes:	103 000
Albi:	81 000
Montauban:	9 000
Rodez:	61 000
Castres:	57 000

4 towns that own more than 20 000 inhabitants

Auch	Millau
Cahors	Colomiers

Population of Midi-Pyrenees: 2 600 000

- 4,4 % of the national territory
- 30.4 % are less than 25 years old (France: 34.2 %)
- 23.9 % are more than 60 years old (France: 19.6 %)
- Population density: 56 inhab. /km² with highly contrasted datas (166 inhab. /km² in Haute-Garonne; 28 in Ariège)
- Urban-rural repartition:
 - Rural territory: 83 % of the territory and 1 million inhabitants
 - Urban territory: 18 % of the territory and 60 % of the population
 - 50 % of the cities have less than 200 inhabitants

With 111 000 new inhabitants since 1990, Midi-Pyrenees confirm its attractiveness, but this strong growth, unequally distributed, develop imbalances in the region, for the benefit of Haute-Garonne and the urban territory of Toulouse agglomeration.

Employment

- 984 152 employments at beginning 1999
- More than 55 000 employments since 1990
 - Agriculture: 7,3 %
 - Industry: 15,9 %
 - Highest unemployment rate: 13,8 % in Haute-Garonne last 99
 - Lowest unemployment rate: 6,8 % in Aveyron last 99
 - Building: 6,4 %
 - Trade: 13,2 %
 - Services: 57,2 %
- 80 % of paid workers in 7 of the 18 employment areas
- Employment area of Toulouse: 45 % of the paid workers
Unemployment rate at 1/1/2000: 10,5 % (France: 10,1 %).



Main industrial activities

Paid workers

Agricultural and Agro-Food industries	22 499
Aeronautical engineering, Railways construction	18 655
Metallurgy, Metal transformation	13 048
Mechanical equipment industry	12 478
Electrical and Electronics equipment industry	10 866
Electrical and Electronics component industry	9 595
Mineral products industry	7 773
Textile industry	6 636
Edition printing works reproduction	6 224
Chemistry, rubber, plastics	6 170

Localization of principal industries

Significant very exchanges in regional the productive system widened the gap between the metropolis (which concentrates the majority of the advanced technology industries and the services) and the remainder of the area. The industrial landscape emphasizes a Toulouse metropolis solid. Although the international trade (import-export) is in regular increase (+ 25,3 % into 97, + 13,8 % into 98), the Midi-Pyrenees remains too not very open to the international area.

Exports indeed massively remain concentrated on the goods of equipment (77 %), primarily in aeronautics and carried out starting from Haute-Garonne. On 116 000 establishments approximately, one counts only 3 441 exporting companies, 25 of them carrying out 70 % of regional exports.



III MAPPING THE ACTORS

In this chapter, we present the main entities which allow to develop the University-Industry cooperation and which try to improve the regional dynamization.

III.1 UNIVERSITY AND SCIENTIFIC – TECHNOLOGICAL OFFER

III.1.A – Universities

The Midi-Pyrenees region counts on the whole 111 144 students, of which:

- 74 488 in universities (including schools of engineers depending on the university and IUT, accounting for respectively 1 996 and 9 411 students)
- 10 943 in STS (Sections of High-level technicians)
- 5 572 in engineering schools.
- 4 230 in IUFM (University Institutes of teachers training)
- 4 001 in para-medical and social schools
- 3 096 in business schools, management and accountancy
- 3 069 in CPGE (Preparatory classes for the High Schools)
- 5 745 in other schools of higher educations

THE UNIVERSITIES

Toulouse accounts 4 universities :

UTM –Toulouse le Mirail University (www.univ-tlse2.fr)

Founded in 1229, Toulouse-Le Mirail University became famous in the 16th century thanks to the Humanists, but it was with the XXth century that it reached its full development. It gives today teaching in the fields of the Letters, Arts, Languages, Social Sciences and even Sciences. It ensures this teaching from the first to the third cycle, DEUG, Licence, Maîtrise, DEA, DESS, Doctorate and Diplomas of University. To fulfil the requirements of the current world, the University created formations with professional purpose, such as IUP in varied fields, the audio-visual communication, the regional planning, education and training. It also developed two University Institutes whose departments belong to the secondary sector.

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USS – University of Social Sciences (www.univ-tlse1.fr)

This University, founded at the beginning of the XIII century, is considered among the oldest university institutions of Europe.

It counts today nearly twenty thousand students, three faculties (*Law, Economical Sciences, and Administration*) and two Institutes (*Institute of political studies, Institute of Administration of Companies*).

Beyond the main teaching, centered on the Law, the Economy or Management, professional formations have been created in partnership with the companies and the branches of industry concerned to support the insertion of the students reaching the end of their university cursus in the economic and social life.

UPS –Paul Sabatier University (www.ups-tlse.fr)

The whole of the scientific disciplines, health, technologies and sport, are taught at University Paul Sabatier. The establishment, divided in several Units of Formation and Research (UFR), Faculties and Institutes, has nearly 28 000 students, 2 000 teacher-researchers and 600 researchers concerned with national organizations of research.

The UPS forms, each year, several thousand of scientific and technical junior managers, dental surgeons, pharmacists, researchers and teachers. It multiplies the ways with economic world to support the openings of its students as well as the economic repercussions of its innovations and scientific discovered.

INPT – Polytechnic National Institute of Toulouse (www.inp-toulouse.fr)

The INP of Toulouse is a public establishment of higher education attached to the Ministry for Youth, National Education and Research and is a part of the three polytechnic institutes of France. The INPT created by the Law of October 14, 1969 is an establishment for cultural and professional scientific matte, considered as university. It gathers four schools of engineers whose cover specialties (agronomy, biotechnology, electronics, chemistry, telecommunications and networks...) and count 15 laboratories.

THE ENGINEERING SCHOOLS

Midi-Pyrenees counts 15 High Schools (13 in Haute-Garonne, 1 in the Hautes-Pyrenees, 1 in the Tarn) which are specialized in the following professional sectors:

AERONAUTIC AND SPACE

75% of the Engineers in the Aeronautic and Space Group are formed in Midi-Pyrenees .Each year 4 000 students are graduated in jobs related to aeronautics.

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Each year 2 000 graduates leave, the schools of the aeronautic/space die; Haute-Garonne have 3 of the 4 High schools for aeronautical engineers (**SUPAERO, ENAC and ENSICA**).

The Haute-Garonne has several schools, specialized in aeronautics and space. We thus find **SUPAERO** (Higher National School of Aeronautic and Space), **ENSICA** (Higher National Engineering School of Aeronautical Constructions) and **ENAC** (National School of the civil aviation), as well as masters specialized in the schools of engineers, the **MBA Aerospace and the Aircraft Management Master of the ESCT Group** (Higher School of Business of Toulouse) and the "Airbus France School" of Blagnac (**LPPIA** : Private professional college of the Aircraft Industry).

Others schools propose formations related to aeronautic and space trading: **ENSEEIH** (Higher National School of Electrical engineering and Electronics, Data processing and Hydrolique of Toulouse), **INSA** (National Institute of Applied Sciences), **ENIT** (National School of Engineers of Tarbes), **ENSTIMAC** (Higher National School of Industrial Technical and the Mines of Albi-Carmaux) and the **UPS** (Paul Sabatier University).

The Haute-Garonne also counts several centers of formation like « **Airbus Training and Flight Operations Support Division** » and **ATR Training Center**.

BIOTECHNOLOGIES AND SCIENCES OF ALIVE

The Midi-Pyrenees region counts more than 12 500 students in Technologies and Sciences of alive, gathered in three establishments:

- ✓ **Paul Sabatier University** (UPS, 4 400 medical students, 1 270 in pharmaceutical sciences, 500 in odontology and 5 230 in biological sciences).
- ✓ **The Doctoral School in Biology, Health and Biotechnologies** (500 doctorates).
- ✓ **The Agronomic Higher National School of Toulouse** (INPT-ENSAT, 635 students).

Without forgetting the establishments which count among their disciplines and specializations the biochemistry/biotechnologies/health sector:

- ✓ **INPT-ENSIACET** (Polytechnic National Institute of Toulouse – Higher National School for Engineers in chemical and Technological Arts, with a specialty, in chemical and biochemical Conversions of the Agro resources)

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- ✓ **INSA** (National Institute of Applied Sciences, with 150 Genius Food and Biochemical students in engineering) .
- ✓ **ESCT Group** (Higher Business School of Toulouse, with the masters « Management of Health and Management of the Biotechnologies” .

COMMUNICATION AND INFORMATION TECHNOLOGIES

The Midi-Pyrenees region proposes 90 informatical formations with also a **cyber master in Law**.

With Five times less students, the Midi-Pyrenees takes into account as many graduates of data processing control than Paris region. These two regions form 1/3 of the graduates of the speciality.

In Midi-Pyrenees, 8 schools offer formations relate to information technologies and communication:

- ✓ **ENAC** (École Nationale de l'Aviation Civile)
- ✓ **ENIT** (École Nationale des Ingénieurs de Tarbes)
- ✓ **ENSAE - SUPAERO** (École Nationale Supérieure de l'Aéronautique et de l'Espace)
- ✓ **ENSEEIH** (École Nationale Supérieure d'Electrotechnique et d'Électronique, d'Informatique et d'Hydraulique de Toulouse)
- ✓ **ENSIACET** (École Nationale Supérieure des Ingénieurs en Arts Chimiques et Technologiques)
- ✓ **ENSICA** (École Nationale Supérieure d'Ingénieurs de Constructions Aéronautiques)
- ✓ **ENSTIMAC** (École Nationale Supérieure des Techniques Industrielles et des Mines d'Albi-Carmaux)
- ✓ **INSA** (Institut National des Sciences Appliquées)

And 4 doctoral schools for third cycle of DEA (Master), research centres of High Scientific Establishments:

- ✓ **Génie Électrique, Électronique et Télécommunications** (INPT/INSAT/SUPAERO/UPS)
- ✓ **Informatiques et Télécommunications** (ENAC/ENSICA/INPT/ENST/SUPAERO/UPS/UT1)
- ✓ **Mathématiques et Applications de Toulouse** (ENST/INSAT/SUPAERO/UPS)
- ✓ **Systemes** (EMAC/ENAC/ENIT/ENSICA/INPT/INSAT/SUPAERO/UPS/USS/UTM)

To know some more about the academic world in Toulouse, consult the website of the European University Network of Toulouse-Midi-Pyrenees. www.pole-tlse.fr

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III.1.B – Research Institutions

Recognized as one of the principal area of French research, with 16 000 researchers of which more than 14 000 in the Toulouse urban area, the Midi-Pyrenees region has particularly powerful laboratories , private and public research centers,, and also mixed laboratories which act mainly in nine fields of excellence:

- Aeronautic and Space
- Chemistry
- Electronics and micro-electronics
- The environnement
- The genius of the processes
- Data processing
- The materials
- The robotics
- Sciences and technologies of alive

We find for example:

AERONAUTIC RESEARCH

Aeronautical research in Midi-Pyrenees gathers 6 430 researchers and technicians in the only public research centers.

The 2/3 of the national workers of the **CNES** (National Center of Space Studies) are in Toulouse, that is to say 1 700 people.

Many research centers related on aeronautics and space are installed in Midi-Pyrenees. We find for example the **ONERA** (National Office of Aerospace Research and Studies), the **CNES-CST** (National Center of Space Studies- Space center of Toulouse), the **CEAT** (Center of Aeronautical Tests of Toulouse), the **CERFACS** (European Center of Research and Advanced Formation in Scientific Research), the **CNRM** (National Weather Research Center), the **CIRIMAT** (Interuniversity Center of Research and Engineering of Materials), the **CERMAS** (European Research Center of Aeronautic and Space Management), the **STNA** (Technical Service of aerial Navigation) and the **CENA** (Studies Center of the Aerial Navigation).

Moreover, we also find the **RIS** (Engineering Network of the Safety of operation), the **TéSA** (Space and Aeronautic Telecommunications), the **PISE** (Integration Center of Energy Systems), the **PEARL** (Power Electronic Associated Research Laboratory), the **LAAS** (Laboratory for Analyses and Architecture of National Systems), the **CESR** (Space Studies Center of Radiation), the **CESBIO** (Space Studies Center of Biosphere), **the Midi-Pyrenees Observatory** and the **MEDES** (Institute of Medicine and Space Physiology).

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To also note the presence in Haute-Garonne of the **IERSET** (European Research Institute on the Electronic Systems for Transport). This institute of co-operative research (created in 1996) gathers some companies (Actia, Airbus France, Alstom Transport, Barcoviev-Texen, Elan Informatique, GIAT Industries, IXI, Motorola Semi-conducteurs, Renault, Siemens VDO Automotive SA, Sinters) and research centers (**CNES, CNRS, ENSICA, GERAC, IDEI, INPT, INSA, ONERA, UPS**) on the topic of the embarked systems and the communication systems for the various means of transport.

At the moment, more than 12 projects joining together great groups, SMEs and research centers have been initiated by the IERSET.

The Haute-Garonne has also the **Foundation of aeronautical and space research** in which are implicated:

- ✓ 8 great industries of Space and Aeronautic: *EADS France, EADS Astrium, EADS Space, Transportation, EUROCOPTER France, AIRBUS France, SNECMA, THALES et LATECOERE.*
- ✓ National public research institutes, in particular the CNRS, the CNES and the ONERA
- ✓ Universities
- ✓ Higher Schools
- ✓ Public research establishments

During 2003 CNRT put in the **Ceres-AE** (Economical and Social Studies and Research Center for Aeronautics and Space).

The CNRT-AE counts also 33 members:

- ✓ **13 industries** : *Aéroconseil-Soditec, Airbus France, Alcatel Space Industries, CS Communication & Systèmes, Dassault Aviation, EADS Astrium SAS, EADS France, EADS Space Transportation, Eurisco International, Liebherr Aerospace Toulouse SA, Noveltis, Snecma et Thalès Avionics*
- ✓ **15 research and formation organizations** : *CENA (Centre d'Études de la Navigation Aérienne), CERFACS (Centre Européen de Recherche et de Formation Avancée en Recherche Scientifique), CNES (Centre National de Recherche Scientifique), EMAC (Ecole des Mines d'Albi-Carmaux), ENAC (Ecole Nationale de l'Aviation Civile), ENSICA (Ecole Nationale Supérieure d'Ingénieurs de Constructions Aéronautiques), ENSMA (Ecole Nationale Supérieure de Mécanique et d'Aérotechnique), GIFAS (Groupement des Industries Françaises de l'Aéronautique et du Spatial), INPT (Institut National Polytechnique de Toulouse), INRIA (Institut National de Recherche en Informatique et en Automatique), INSA (Institut National des Sciences Appliquées), ONERA (Office National des Etudes et Recherches Aérospatiales), SUPAERO (école nationale SUPérieure de l'AEROnautique et de l'espace) et UPS (Université Paul Sabatier Toulouse III)*
- ✓ **5 collectivités** : *Communauté d'Agglomération du Grand Toulouse, Conseil Général de la Haute-Garonne, Conseil Régional de Midi-Pyrénées, Ministère de la Jeunesse, de l'Éducation Nationale et de la Recherche et Ministère de l'Équipement, des Transports, du Logement, du Tourisme et de la Mer.*

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RESEARCH IN SCIENCE OF ALIVE

The public research: Midi-Pyrenees represents 2 200 researchers in 70 research laboratories over the whole region. In particular:

- **INSERM** (National Institute of Health and Medical Research, 18 structures of research for 260 researchers, engineers, technicians and administrative people, 350 publications by year)
- The **CNRS** (National Center of Scientific Research, 71 operational structures including 28 in life sciences, 11 in chemical sciences and 8 in engineering sciences)
- The **CHU** (Universitary Hospital Complex) of Toulouse (9 900 workers, 1 500 doctors including 230 academics)
- The **CIC** (Clinical Center of Investigation) of Toulouse (of which the role is to put at the disposal of the teaching hospital community, researchers of the INSERM and other institutional origin, buildings and personnel)
- The **INSA** (National Institute Of Applied Sciences, 448 teaching-researchers, engineers, technicians and administrative people for 13 research and development laboratories in the agro-biosciences)
- The **UPS** (Paul Sabatier University, 65 laboratories in biology, medicine and health, 16 laboratories in physics and sciences for the engineer and 8 chemistry laboratories)
- The **INRA** (National Institute of the Agronomic Research, 21 units of research : 11 mixed units in co-supervisation with another higher research or educational establishment and 10 only units)
- The **INPT-ENSAT** (Polytechnic National Institute of Toulouse- Higher agronomic National School of Toulouse)

The private research: the Midi-Pyrenees region represents 2 000 researchers inside great international groups like:

- **Pierre Fabre Laboratories** (900 researchers in Midi-Pyrenees from 23 different nationalities, 3 institutes of research in Midi-Pyrenees)
- **Sanofi-Synthelabo** (700 researchers specialized in biotechnologies and the drugs)
- **Syngeta Seeds** (200 people gathered on 2 sites in Midi-Pyrenees including 140 researchers in vegetable biotechnologies)
- **RAGT Génétique** and R2n (120 researchers in vegetable biotechnologies)

Moreover, Midi-Pyrenees has also, the **CTBM-CRIT Bio-industries** (Center of Transfer in Biotechnologies and Microbiology of INSA Toulouse) which ensures activities such as: consultancy, study, training, development in the agro-alimentary field, depollution, environment, energy and fine chemistry.

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RESEARCH IN INFORMATION AND COMMUNICATION TECHNOLOGIES

Second data-processing area of research in France, the Midi-Pyrenees region has 6 research centers in the fields of electronics, data processing and telecommunications:

- The **CERFACS** (European Center of Research and Advanced Formation in Scientific Calculation) 90 researchers and engineers issued of 10 different countries who work on specific projects.
- **IRIT** (Data Processing Research Institute of Toulouse) 161 teaching-researchers, 22 researchers and 120 doctorants around seven federator topics :
 - Analysis and the synthesis of information
 - Architecture, systems and networks
 - Indexing, storage and research for information
 - Interaction, autonomy, dialogue and co-opération
 - Modelling, algorithms and high performance calculation
 - The reasoning and the decision
 - The safety of software development
- The **LAAS/CNRS** (Laboratory for Analysis and Architecture of National Systems/National center of Scientific Research) 179 researchers and 171 doctorants around three great disciplines :
 - Automatic
 - Informatics
 - Micro-electronics
- The **ONERA** (National Office of Aerospace Research and Studies), more than 1 000 scientists divided through all France around five topics:
 - The great technical means
 - The materials and structures
 - The mechanics of the fluids and the energetic
 - Physics
 - Data processing and the systems
- The **FéRIA** (Federation of Research in Data Processing and Automatic), federation which includes the CIRIT, the LAAS/CNRS and the ONERA, deals seven major topics.
- The **TéSA** (Space Telecommunications and Aeronautics) are a co-operative laboratory gathering the research centers (CNES, IRIT, ONERA), the higher educational establishments (ENAC, ENSEEIHT, ENSICA, INPT, SUPAERO, Telecom Paris) and the companies (Alcatel Space, Rockwell Collins), with the support of the Regional council of Midi-Pyrenees and the Engineering department of the Aerial Navigation.

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III.2 MARKETS ACTORS – PRODUCTIVE SYSTEM

III.2.A – Distribution by branch of industry and leaders

Below the number in % of the establishments in Midi-Pyrenees by professional branch of industry.

	Midi-Pyrénées	Region/France
	2003	
Agricultural industries and food industries	4 129	5,4
Industries of consumer goods	3 457	4,1
Car industries	116	4,2
Capital equipment industries	2 291	4,6
Semi-finished goods industries	3 939	5,0
Energy	976	8,0
Construction	19 439	5,5
Trade	35 420	4,5
Transports	4 359	3,8
Real estate	3 661	4,3
Services to companies	18 561	3,8
Services to private people	19 207	4,3
Education, health, social action (2)	18 019	5,2
Total	133 574	4,6

(1) Ensemble des secteurs marchands de l'industrie, de la construction, du commerce et des services.

(2) Etablissements du secteur privé.

Source : INSEE - Répertoire Sirene

Largest employers of Haute-Garonne registered to the CCIT

Airbus France (construction of cells of aircraft), **Sncf** (transport rail-bounds), **Amec Spie Sud-Ouest** (work of electric installation), **Alcatel Space** (Manufacture of equipment of emission and hertzien transmission), **EADS Astrium** (Construction of launchers and spacecraft), **Siemens VDO Automotive** (Manufacture of electric materials for engines and vehicles), **Air France KLM** (Passenger air transports), **EDF** (Distribution and trade of electricity), **Freescale Semiconducteurs France** (Manufacture of active electronic components), **Centre National Études Spatiales**, **Semvat** , **Sogarra France Carrefour** (Hypermarkets), **Securitas France** (security), **Hydro Building Systems** (first transformation of aluminum).



III.2.B – The main economic sectors

THE INDUSTRIES

A diversified industrial panel: 6 278 companies and 91 100 workers (en 2003), 90 % having less than 10 workers. The industry of Haute-Garonne is equipped with a significant know-how in traditional industries and with high technology.

AERONAUTIC AND SPACE

The Midi-Pyrenees region accounts 23 firms (19 900 employments) in aeronautic and space (*INSEE 2003*);

- 15 firms(12 800 employments) in aeronautic
- 8 firms (7 100 employments) in space

Moreover, 534 firms (28 000 employments) are related to the aeronautics and space engineering (suppliers, sub-contractors, service provider) which represents on average 44,5 % of their total sales turnover. The Haute-Garonne gathers 430 of these firms (22 600 employments).

From construction to maintenance, the entire line of production is present in the area.

The region became one of the first poles of space telecommunications in Europe with the set up of **Astrium** (in the past Matra which became subsidiary of EADS).

Toulouse also became a major site for the realization of program like Galileo (system of navigation by European satellite, competitor of the American GPS) to which take part in particular Astrium and **Alcatel Space Industries** (Toulouse).

In the Haute-Garonne department, aeronautical and space engineering is the principal axis of industrial specialization. For proof, the mechanical activity and metals work, very significant in the department, are today mainly used like subcontracting for the aeronautical and space industry. In 2003, the aeronautical/space activities represented 47% of employment in Midi-Pyrenees.

With 22% of workers of aeronautics and space French, the region is at the second national rank, just after the region of Paris. In ten years, aeronautical workers increased of half in the Midi-Pyrenees region

The aeronautical and space consumption products represent 51, 5 % of the imports and 73,3 % of the exports of the Midi-Pyrenees region. Thanks to the strong presence of aeronautic and space sector, the Haute-Garonne represents a significant pole for the foreign companies, in particular American. The foreign investments in Midi-Pyrenees in 2003 reached the 42 M€.

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The leaders companies of the sector:

- **Airbus** company (Toulouse) is the world leader of the civil aircrafts of more than 100 places.
- **ATR** company (Toulouse) is the world leader of the turboprop planes from 40 to 70 places.
- **Latécoère** company (Toulouse) is the first supplier of aerostructures of EADS, Airbus France, Dassault and Embraer.

Among the first ten employers' establishments in the industry of Haute-Garonne, we find Airbus France (Toulouse), Alcatel Space Industries (Toulouse), Astrium SAS (Toulouse) and Airbus (Blagnac).

BIOCHEMISTRY – BIOTECHNOLOGIE – HEALTH

The Midi-Pyrenees region registered 33 companies in biotechnologies (332 employment except **Pierre Fabre** and **Sanofi-Synthelabo**), 165 companies in the field of technologies and sciences of alive (9 000 salaries) and 336 firms in chemistry, pharmacy, and plastic (11 536 employment) (2003).

Midi-Pyrenees also accommodates **Génopole** Toulouse Midi-Pyrenees, the medical safety of food, the **Midi-Pyrenees food-health pole** and the **Biotechnologies city**. This last one born from the partnership concluded between the Aquitaine and Midi-Pyrenees regions and gathers two communities of agglomeration (Grand Toulouse and SICOVAL), where already exist many companies specialized in biotechnologies: Prologue Biotech.

The leader companies of the sector:

- The **Pierre Fabre Laboratories** (8 700 employments including 2 800 in Midi-Pyrenees), second independent French pharmaceutical group, count 4 branches :
 - Pierre Fabre Médicament
 - Pierre Fabre Dermo-cosmetic (first laboratory dermo-cosmetic in Europe)
 - Pierre Fabre Health
 - Dolisos (second world homeopathic laboratory)

Pierre Fabre is based in the Tarn (Castres, Gaillac, Lever, Mazamet, Soual), Gers (Aignan), Haute-Garonne (Labège, Muret, Toulouse, Ramonville) and Lot (Cahors).

This company counts 6 sites of production, 3 research centers, 1 data-processing platform and 1 distribution center.

- **RAGT** group (1 450 employments) with 3 branches: *RAGT is based in Rodez (Aveyron) : RAGT Génétique/R2n/RAGT Seeds.*

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- **Sanofi-Winthrop Industries** (190 employments), based in Colomiers (Haute-Garonne), is a subsidiary of Sanofi.
- **Hémodia** (200 employments), based in Labège (Haute-Garonne), is the European leader for the design, the manufacture and marketing of medical devices of single use for haemodialysis.
- **Seppic** (260 employments including 70 in research laboratories), based in Castres (Tarn), belongs to the Liquid Air Group.
- Nutrition and health (**Cérééal** & **Gerblé**), based in Revel (Haute-Garonne), belongs to the Novartis group (Suisse, 900 employment including 500 in Midi-Pyrenees).
- **Merial** (350 employments), based in Toulouse (Haute-Garonne) is the most significant of the 16 sites of production of the Merck & Co Inc group (United States) and Aventis. This site carried out 45% of the world sales turnover of the group in 2002.
- **Syngenta Seeds** (470 employments), based in Saint-Sauveur (Haute-Garonne, European head office Syngenta Seeds) and in Lombez (Gers), belongs to Syngenta group (Suisse).
- **Pioneer Semences** (220 employments), based in Aussonne (Haute-Garonne, greater research center of the group in France), is a subsidiary company of Pioneer Hi-Bred (Dupont de Nemours group, United-States).
- **Ciba Vision France** (120 employments), which the head office is in Blagnac (Haute-Garonne), belongs to Novartis (Suisse). This company is, since 1991, leader of the market of the lenses of contact.

COMMUNICATION AND INFORMATION TECHNOLOGIES

The Midi-Pyrenees region counts 1 487 companies (36 310 employments) in electronics, data processing and telecommunications (INSEE 2001), including:

- 1 080 companies (14 870 employments) in data processing
- 204 companies (13 830 employments) in telecommunications
- 203 companies (7 610 employments) in electronics

First French region after Paris region in the sector of the TIC (Communication and Information Technologies) in terms of employees, Midi-Pyrenees became the first French pole for the embarked systems. In addition, the Midi-Pyrenees is the second French region for consultancy in systems and data processing departments.

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The electronic components, computers and data-processing equipment represent 6.2% of the imports and 2.4% of exports of the Midi-Pyrenees region. Moreover, it should be noted that the Midi-Pyrenees region maintains a strong potential foreign investment, in particular in the sector electronics/data-processing/telecommunications.

The leader companies of the sector:

- **Motorola Semiconductors**, based in Toulouse (Haute-Garonne), specialized in the electric and electronic components, employs 2 350 workers.
- **Siemens VDO Automotive**, based in Toulouse (Haute-Garonne), Foix (Ariège) and Bousens (Haute-Garonne), one of the largest suppliers in the world of electronics and mecatronic for car.
- **Alstom Transport**, based in Tarbes (Hautes-Pyrenees), company specialized in railway rolling stock and technology TGV, employs 1 100 workers.
- **Inforsud**, based in Rodez (Aveyron), specialized in the information systems, printing works and the editic, employs 950 workers.
- **MAEC**, based in Cahors (Lot) and in L'Union (Haute-Garonne), offers services for energy and fluid distribution with 900 employees.
- **Rockwell Collins**, based in Blagnac (Haute-Garonne), specialized in avionics, electronics of defense and communication systems, employs 500 workers.
- **Actia**, based Toulouse (Haute-Garonne), specialist in the diagnosis, for electronics and telematics of the vehicles, employs 500 workers.
- **Fast Maintenance Informatique**, based in Blagnac (Haute-Garonne), data-processing service provider, employs 450 workers.
- **Silogic**, based in Toulouse (Haute-Garonne), data-processing engineering Service Company, employs 400 workers.

MECHANICS AND MÉTALLURGIE

One of the principal French poles in mechanics and metallurgy.

To know some more, consult the website of the **UEM** (Union of the companies of the metallurgy) www.uem.fr

Number of workers: 4 000

The leader companies of the sector:

- *Arck Ingénieries, Arias, Atelier Sous-traitance du Comminges, Auriol Frappe à Froid, Camerin, Carre, Cauquill, Connectable, Digital Control, Espes, Gentilin, Joly, Méca 31, Mecaero, Mecahers, Mecamesures Technologies, La Mécanique, Peyre, Safom, Satem Industries, Simalux, Sogem, Techni moules, Tofer Ateliers...*

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FOOD INDUSTRY

Number of establishments: 357

The leader companies of the sector:

- 3A
- Etablissement Brusson Jeune
- Les Grands Moulins de Paris
- Heudeubert
- Nutrition et Santé
- Nutrition et Soja
- Le Pétrin du Papé
- Seita,
- SFM,
- Sud

THE SERVICES

This sector seems to have the most important employments with 15 369 firms and 110 450 workers (2003).

The services destinated to the couple registered the strongest progression. They represent 20% of creations.

The services for companies grow up over 23% in 10 years.

- Number of workers: 90 274 (at 31/12/2000)

- Number of firms: 13 233

The leader companies of the sector:

- *123 Multimédia, 4 M Promotion, Actielec, Actif, Axa Assurances, Banque Populaire Toulouse-Pyrénées, Caisse d'Epargne Midi-Pyrénées, Caisse des Dépôts et Consignations, Cegetel, Chausson Matériaux, La Cité Jardins, Claris Technologies, Clinique des Cèdres, Clinique Pasteur, Compagnie Continentale, Crédit Agricole de Toulouse et du Midi-Toulousain , Crédit Mutuel, Electro-Midi, Etude Documentation Impression, Exco Fiduciaire du Sud Ouest, Fram, Intespace, IRSO-MPSO, Labinal, Nouvelle Clinique de L'Union, Patrimoine SA Languedocienne HLM, Promologis , Société des Cliniques du Midi, Société Européenne d'Ingénierie Multi-Techniques et de Communication, Société Générale, Société Générale des Prestations, SOFIP (SOCIÉTÉ de Franchise pour l'Information Pharmaceutique), Sogclair, Spot Image1 ...*

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THE TRADE

With 14 894 companies and 62 255 workers (2003), the economic importance of this activity is very significant. In number of firms and employees, the commercial sector of Haute-Garonne represents more than a third of Midi-Pyrenees, Having, few years ago, the record of the m2, the Toulouse agglomeration reached a certain balance. Globally, the trade in Haute-Garonne generates more than 7.3Md€ with an added value of 1.4Md€.

The leader companies of the sector:

- *Anconetti, Bardou SEE, Beauté plus, Bernard Pagès, Casino Groupe, Castela, DB Distribution, Decathlon, Delzongle, Ecomarché Apicius, Galeries Lafayette, Gefiroga, Isolants du Sud Ouest, K Bricolage, Lapeyre, Logidis, M3PI, Midi Papier Peints, Nigris, Nobladis, Nuell Dorisse, Oddos et Sebiran, Perry, Pujol Chaumet, Savfima, SCG France, Socamil, Sodinex, Sodirev, Sogara, Toutelectric, Ugap, UMS...*

INTERNATIONAL TRADE

The international trade of Midi-Pyrenees increased by 12, 6% in the first half of 2004 (compared to the first half of 2003) and reached 9 billion €. The imports dropped by 12, 4% to reach the 5, 9 billion €. Over the same period, Haute-Garonne recorded a progression of 15, 8% with export (7, 5 billion €) and a fall of 15, 6% with the importation (4, 9 billion €). The commercial surplus in Haute-Garonne is of +2, 6 billion euros for the first six month period 2004.

III.2.C – New technologies based companies

In the field of biotechnologies and health, in addition to leaders French and foreigners companies, the Midi-Pyrenees region has also 35 "biotech start-up", created these 10 last years (including 7 currently out of the Incubator).

We thus find :

- *AbTech , Affichem, Argène Biosoft , Avogadro, Biodema, Biosentec , Biotrade , BT Pharma, Cayla , Dendrichem , Endocube , Enzymomics, Genibio, G.T.P , IEB (Institut Européen de Biologie cellulaire), Innadev Pharm, Innopsys , Innovaderm , Kobo Products , LBP Agro-Pharma, MilleGen , Nanobiotix , Novaleads , Orfagen , PaluMed , Picometrics , Scanelis, Urodelia et les 7 entreprises en incubateur : ACTiGenics , Boisvalor, Physiogenex, PraXcell Therapies, Quantome, TDS Pharma et Uroleads.*

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III.3 INTERFACE ORGANISMS

III.3. A- R&D and Technology Transfer Institutes

In addition, Midi-Pyrenees has been able to set up an excellent synergy research-industry to the service of technology transfer with more than 1 000 signed contracts research-industry each year.

LES CRITT - Regional Centers of innovation and Technology Transfer (CRITT) +CTTM

- CRITT agro-food C3A (Auch)
- CRITT Agroressources CATAR (Toulouse)
- CRITT Automatisation CAAPI (Albi)
- CRITT Bio-Industries (Toulouse)
- CRITT Wood (Rodez)
- CRITT Industrial mechanics (Toulouse)
- CRITT Procédés Environnement (Toulouse)
- CRITT 65 Collage Technacol (Tarbes)
- CTTM (Medical technology transfer center)

4 CRITT are based in Toulouse: CRITT Bio-industries, CRITT Génie des procédés, CRITT Agroressources and CRITT Industrial Mechanics.

These technological platforms are service providers which support the innovation of SME in their giving access to technologies and relevant researches for their development.

The CRITT are generally affiliated at university research laboratories. They mobilize various actors of the research and the technological transfer, which put at the disposal their technical means to insuffle a process of innovation necessary to the development of SMEs. The CRITT advise and bring a technical assistance to SME, prepare feasibility studies of their projects, give them access to the financial resources, facilitate the synergy between industry and university.

MIDI-PYRENEES INCUBATOR

A regional incubator, for the innovating companies' creators, is established in the CEMES (Center of Development of Materials and Structural Studies), Toulouse laboratory of CNRS.

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The "Midi Pyrenees Incubator" is an instrument of assistance to the creation of companies in our area. It has the role to support the emergence and the realization of projects of companies innovating in all the branches of industry in using the scientific potential of the universities and the public organizations of research.

Born from the law on the innovation in 1999, the Incubator is co-financed by the French government and the Midi-Pyrenees Regional Council. To accompany twelve projects by year, the Midi-Pyrenees Incubator has a budget of one million euros. In 2000, the "Contract of plan State-Region ", which includes the Incubator, provides a financing until 2006.

REGIONAL NETWORKS FOR TECHNOLOGICAL RESEARCH

The Regional Networks for Technological Research were born of a joint awareness from the *Midi-Pyrenees Regional Council* and the *French Government acting by the Regional Delegation for the Research and the Technology* of the need for supporting the realization of research projects and development.

Their objective is to stimulate the innovative collaboration between the companies (more particularly SME) and the research centers, in order to create new products and new services.

The action of the networks is done in dialogue with all the public and private actors implied in the economic development of the area.

OTHERS TECHNOLOGY TRANSFER INSTITUTES

- ADEPA (Agence de la Productique)
- ARIST (Agence Régionale d'Information Stratégique)
- ASEDIS-SO (Association pour le Développement des Semences dans le Sud-Ouest)
- CEFEL (Centre d'Expérimentation Fruits et Légumes)
- CETIH (Centre Technique des Industries de l'Habillement)
- CETIM (Centre des Industries Mécaniques)
- CIC (Centre Technique Cuir Chaussures Maroquineries)
- IFP (Institut Français du Pétrole)
- IM2P (Institut des Matériaux de Midi-Pyrénées)
- INNOVEGAZ (Convention Gaz de France / Ministère de la Recherche)
- ITV France (Centre Technique Interprofessionnel de la Vigne et du Vin)
- NOVELECT (Convention Electricité de France / Ministère de la Recherche)
- UPS Département de Chimie de Castres

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FOUR COMMON LABORATORIES

These common laboratories research-industry were created with the support of the Midi-Pyrenees region.

- **Laboratoire « Amélioration des Matériaux Structuraux pour l’Aéronautique » (AMSA)**
Aérospatiale, Ecole des Mines d’Albi-Carmaux, ENI de Tarbes, UPS, CNRS, INPT, Région
- **Laboratoire d’Ingénierie de la Sûreté de Fonctionnement (LIS)**
Aérospatiale, EDF, Matra marconi Space, Technicafone, Thomson CSF, LAAS-CNRS
- **Laboratoire Capteurs et Intégration de Puissance (LCIP)**
Motorola, LAAS-CNRS
- **Laboratoire Economie de l’Energie, de l’Environnement et du Secteur Public (LEESP)**
Institut d’Economie industrielle (IDEI), Université des Sciences Sociales, CEA, Région

INTERFACE ORGANIZATIONS

- **ADERMIP** (Association pour le Développement de l’Enseignement, de l’Economie et des Recherches de Midi-Pyrénées)
- **MIDITECH** (Réseau de Diffusion Technologique Midi-Pyrénées)
- **RELAIS-MIP** (Réseau des Entreprises et des Lycées pour l’Appui à l’Innovation Technologique en Midi-Pyrénées)

III.3.B –Entrepreneurial Associations and Chambers of commerce

Three of the main associations having a link with the innovation:

➤ **GIPI – Club of Innovation for Industry** (www.gipi.org)

The GIPI is a club to follow the SME in the economic and social changes, by a permanent link between teaching, research and industrial and economic activities. The activities are centralized on the high technologies, applied to the sectors such as aeronautics, electronics, space, data processing, mechanics, health and biotechnologies.

➤ **La mêlée numérique** (www.meleenumerique.com)

Recognized in Midi-Pyrenees as the actor of the numerical economy, the *Mêlée numérique* gathers men, initiatives and ideas around the TIC (communication and information technologies). With more than 200 partners and the mobilization of 5 000 regional or extra-regional companies, the *mêlée numérique* became a network of great scale.

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- **SISMIP – Syndicat des Industries de santé de Midi-Pyrénées**
(www.sismip.com)

The Midi-Pyrenees counts 8 Chambers of Commerce and Industry:

- The CCI of Haute –Garonne in Toulouse : www.toulouse.cci.fr
- The CCI of Lot in Cahors : www.lot.cci.fr
- The CCI of Aveyron in Millau : www.millau.cci.fr
- The CCI of Hautes- Pyrenees in Tarbes : www.tarbes.cci.fr
- The CCI of Gers in Auch : www.gers.cci.fr
- The CCI of Ariège in Foix : www.ariege.cci.fr
- The CCI of Tarn-et-Garonne in Montauban : www.montauban.cci.fr
- The CCI of Tarn in Albi : www.albi.cci.fr

Within the framework of their historical missions, the Chambers of Commerce and Industry give to the public authorities their opinions and information on the economical questions. They also give recommendations within the framework of their reflexions and the decisions which will orientate the development of the department and the regional planning. They offer supports support to companies.

III.3.C –Technological Parks

Four of the main projects:

The first two parks offer to the young companies the advisability of integrating a new device, especially designed to accompany their development.

- **Toulouse Technopole**
- **Labege Innopole**
485 companies, 10 250 employments and 3 000 students
A nursery of companies mainly dedicated to biotechnologies.
- **AéroConstellation**
In 2004 was inaugurated the AéroConstellation site. It is a zone of 260 hectares entirely dedicated to aeronautics. It is the largest of this type in Europe. On this site is the assembling hall for the A380, the workshops of maintenance for Air France Industry, the associated companies involved in the A380 project and the engineering departments.
- **Cancéropôle**
At the initiative of the city hall of Toulouse, was launched on March 31, 2004 the project of the future Cancéropôle which will show collaboration in the field of scientific and medical research between Bordeaux, Limoges, Montpellier, Nîmes and Toulouse. The Cancéropôle will gather 2 000 researchers on 220 ha of grounds. The project must be completed during 2007.

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III.3.D –Financial Institutions

Deliberately, we will present only the assistances supporting the creation of companies and the development of innovating projects.

The regional policy is thus articulated around four devices:

- **The new call to projects(except contract State Region) set up in 1999**
The new call to projects is articulated around the following problems:
The man in our area, the man in his environment, the development for man, the man and the company.
Financing of multiannual research projects; 30MF/year for appreciatively 50 projects.
- **« Le Contrat Etat Région »**
The government and the Regional Council have contractualisation cycles (2000-2006) and propose to finance devices:
For Research: 500MF (around) to finance buildings, important projects for research.
For the Technology Transfer: 200 MF (around) dedicated to R&D and technology transfer institutes.
- **Assistance to the Technology Transfer**
Financings of the structures « Call to projects Diffusion, Innovation, Technology Transfer”, either within the framework of the “Contrat Etat-Region”, or specific measurements regions for technological agencies, linked with the professional world.
- **For the creation of innovating companies**
 - SA Fond d'amorçage (from the Incubator or research), Midi-Pyrenees Creation...
 - SOCRI (Midi-Pyrénées + Aquitaine) - important Capital Risk
 - ANVAR Device; financial advances, subsidies, feasibility studies
 - Regional assistance devices : PTR, NTIC, FRATT, FRAII,...

III.4 GOVERNANCE

III.4.A – National

Several ministries and agencies coordinate and direct the policies and the strategies interfering in the University-Industry relationship:

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- **The Ministry for National education, Higher Education and Research** (www.education.gouv.fr)
- **The Ministry for Employment, Work and Social Cohesion** (www.travail.gouv.fr)
- **The Ministry for the Economic, Finances and the Industries** (minefi) (www.industrie.gouv.fr)
 This ministry is divided into three under ministries: the ministry delegated to industry, the ministry delegated to SME and the ministry delegated to research.
 In addition, the MINEFI coordinates various organizations which support the activities of the industries, of which the national agency for valorization of research. This last is known as "French agency of the innovation", ANVAR, and has a budget of 350M€, for the year 2005, to finance research projects in public institutions.
- **OSEO-ANVAR** (www.anvar.fr)
 Its principal mission is to support the innovation effort of the creators of companies, SME and research laboratories, in particular by sharing the financial risk inherent to the technology transfer, with the development of a product, process or new service, with a technology component. The ANVAR is decentralized in 25 regional delegations.

III.4.B – Regional Public Bodies

REGIONAL INSTITUTIONS

REGIONAL COUNCIL OF MIDI-PYRENEES

The Regional Council is competent to promote the economic, social, cultural, scientific and medical development of the region and the installation of its territory.

The principal fields of competences of the regional institution are:

- Education
- Territory's installation
- The durable development of the regional territory
- Regional valorization

The Regional Council works in close cooperation with the Government and the others collectivities – such as the communes, the departments (General Councils), the professional and consular organizations (CCI), associations...in its various sectors of intervention.

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THE COMMUNITY OF AGGLOMERATION OF « GRAND TOULOUSE »

The community of agglomeration of Grand Toulouse is a young structure whose competences have been determined by the 21st century's challenges according to the rank that the Grand Toulouse (25 communes wishes to reach within the framework of the new European space, in terms of economic development, environmental protection, housing policy and territory's installation.

THE GENERAL COUNCIL OF HAUTE-GARONNE

The general council regulates the businesses of the department within the framework of the distribution of competences between the local communities and the Government. It also interferes in fields which are not under its initial responsibilities:

- Social action and health
- Education
- Transports
- Agriculture and regional installation
- Environnement
- Housing
- Tourisme
- Arts and sport...

TOULOUSE MIDI-PYRENEES UNIVERSITY NETWORK

The Pole is a grouping of public interest:

- Universities and the engineering schools
- Chamber of Commerce and Industry
- Local collectivities

It has as competences on four spheres of activity:

- International relations
- Research and Technology Innovation
- University-Industry relationship
- Culture

REGIONAL DEVELOPMENT AGENCIES

There are several regional development agencies in Midi Pyrenees. The most significant are:

REGIONAL AGENCY FOR THE STRATEGIC AND TECHNOLOGICAL INFORMATION (ARIST)
(www.midipyrenees.cci.fr)

Within the Regional Chamber of Commerce and Industry of Midi-Pyrenees (CRCI), ARIST constitutes a support to the Small and Medium-sized industries in the fields of technological and decisional information, in relation with their step of innovation and reinforcement of the concurrencial advantage.

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REGIONAL DIRECTION OF INDUSTRY, RESEARCH AND ENVIRONMENT (DRIRE)

The agency depends of the Ministry of Economy, Finances and Industry. Its fields of competence cover the durable development, environment, nuclear safety, and assistance to companies.

THE FUTURE INNOVATION REGIONAL AGENCY OF MIDI-PYRENEES (ARI)

This last hasn't yet officially taken form, but it should coordinate the various existing technological plat-forms.

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