

It's the place to be mobile

EXPERIENCE PROVENCE

Located in Southern Europe's Silicon Valley

MARKET AND FINANCING

EUROPE

- 219 million mobile phones sold in 2009
- Biggest regional market in the world after Asia
- Penetration rate of 100% in virtually all the European markets



European Impetus:

- ERDF subsidies: € 308 bn. Financed by the ERDF for the period 2007-2013. This includes a European financing strategy for companies designed to promote innovation and the knowledge economy and to develop enterprises and the information society to improve regional competitiveness.
- i2010 strategy: € 51 bn. Financed by the seventh framework program for technological research and development for the period 2007-2013, i2010 is a European Commission measure to promote know-how and innovation in the communications and media field. It has recently been superseded by a new initiative - the Digital Agenda.
- Use of the ".eu" Internet address suffix for an enhanced web visibility.

FRANCE

- 61.49 million mobile phone lines allocated
- Penetration rate of 92%
- Mobile phone industry turnover estimated at € 4.7 bn.
- Market shared by 3 main operators: Orange (46%), SFR (36%), Bouygues (18%).
- Orange is one of the top 3 European service providers and SFR is in a partnership with the European N°1 Vodafone.

French Impetus:

A development policy is in place that aims to make the country n°1 in Europe for mobile phone use and services:

- Multiple aid programs: Aid for innovating projects given to SME's and companies with fewer than 2000 employees; tax credits (import-export, creations, research...); RIAM (Research and Innovation in the Audiovisual and Multimedia fields) aid... In particular the "TIC&PME 2010" plan with a budget of € 7 bn. to encourage SME's to invest more in ICT's.
- Develop the smartphone market: This was the main source of income for the mobile phone industry in 2009. The smartphone is considered to be the new catalyst for the mobile phone market. The French market for technological goods registered a turnover of € 17.8 bn. in 2009, which included the sale of 3.6 million smartphones.

THE PACA* REGION:

- Penetration rate of 107.4%
- Biggest French region after the Ile de France
- 41,000 ICT jobs, including 1,200 research posts in the public sector
- 14 schools training 1,500 engineers each year
- More than € 400 M in public and private sector investment in 2009

Regional Impetus:

- **SCS Competitive Cluster:** supports and promotes the creation of innovative and joint projects around the cluster's various sectors. The cluster, which each year invests € 200 M in R&D, brings together 140 companies including 25 world-renowned groups such as STMicroelectronics, Gemalto, Tagsys, Avenir Telecom, Orange Labs, Psion Teklogix, Texas Instruments and Vivendi Mobile Entertainment.
- **Belle de Mai Media Park:** A meeting point for start-ups, multinationals, designers and product, service and solution developers. The park hosts around 30 companies, including CityVox, Mobile Distillery, TSF, Kezia, Néocom Multimédia and Mail Club.
- **Belle de Mai Business Incubator:** Part of the media park, the incubator provides access for project carriers to the necessary services such as expert advice, communications and partnership deals.



*PACA: PROVENCE-ALPES-CÔTE D'AZUR

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EU top 5 place for talent *

THE MOBILE CLUSTER

Cloud Computing, SaaS:

- **Dmailer:** The company has shipped more than 50 million copies of its world-leading Dmailer Sync synchronization software to more than 130 countries.
- **Jaguar Network:** The telecoms operator's 20 data centers are connected via a nationwide fiber-optic network.

Contactless Services:

- **STMicroelectronics:** The leader in microchips employs 3,000 production and R&D staff at its premises in Rousset near Aix-en-Provence.
- **Gemalto:** Manufacturing secure personal devices, software applications and providing associated services, the company's revenue for 2009 was € 1.654 bn.
- **Inside Contactless:** The world leader in contactless payment and NFC solutions.

Middleware, mobile software:

- **Mobile Distillery:** A supplier of software and services for mobile applications, Mobile Distillery has over 7 years' R&D experience in the field.
- **Paca Mobile Center:** The company provides a pooled "mobile phone library", which can be accessed for testing content, applications or technologies on mobile handsets. This structure, which is unique in Europe, has reached its present position in a little over 3 years.

Mobile content (video games, advertizing, Web 2.0...)

- **Vivendi:** Zaoza, a subsidiary of Vivendi Mobile Entertainment, provides on-line content distribution and sharing services to its 900,000 members.
- **Exkee:** An independent mobile games developer, Exkee works with other developers such as In-Fusio, Visiware, I-Play, Nobilis and Bigben Interactive.
- **LDMobile:** Delivers "high fidelity" content to the various types of terminals on the market (GSM phones, PDA phones...), in all, more than 1,000 listed mobile terminals.
- **Cellcast:** One of the leaders in francophone countries for the supply of paid mobile content, the company develops applications based on the convergence of mobile and Web, with a strong video element.
- **Spir Group:** The leading press group in France has been growing for nearly 40 years. The group has shown a cumulative increase in turnover of 65.5% over the past six years.
- **Miyowa:** The leader in turnkey mobile messaging solutions has seen growth of 6,440%. Its main clients include MSN, Yahoo and Orange.
- **CityVox:** European leader for web-based tourist information, the company was purchased by Orange in 2008. Its website receives 2.2 million visitors each month.

- **Autrement:** Since its founding in 2008, the company has been developing a new generation of shopping robot for hotel accommodation for the Web and mobile phones in France and in Europe.

Distribution:

- **Avenir Télécom:** the leading European multichannel mobile distributor



Mobile Monday Méditerranée:

A group of visionaries, developers, professionals and users from the mobile phone sector that brings together the south-east of France's "mobile" community in Marseilles (the heart of "Mobile Valley").

* Source Financial Times, March 2010

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