TOULOUSE MÉTROPOLE: AMBITIONS FOR 2026 AN INNOVATIVE AND SUSTAINABLE ECONOMY

ROADMAP INNOVATION - ECONOMY - EMPLOYMENT EUROPE - INTERNATIONAL REACH 2022 - 2026

Toulouse, a metropolis focused on ecological, social and digital transitions built into the core of its economic project

7 AMBITIONS · 23 ACTIONS

Au cœur de votre quotidien





CONTEN

EDITORI

INTRODU

AMBITION 1:

Action 1: Increasing the capacity and quality of hosting for our businesses via a strategy for developing and making available land and real estate to foster and back high-growth potential businesses. ... 11

Action 3: Developing innovative mechanisms and partnerships to hone support for our businesses and craft trades... ..12

AMBITION 2: Toulouse, a metropolis committed to industrialists in the aviation and space sectors, preparing our flagship industries to meet the changes to low-carbon aviation and the new-space era13

of the Metropolis...

ΓS

AL		 	 	 	 	7

JCTION	8
--------	---

Toulouse, a metropolis investing in real estate structures, hosting, supporting, developing businesses and inspiring business leaders....10

Action 2: Fostering the development of innovative fledgling businesses by modernising hosting facilities and enhancing service quality levels via the Toulouse Métropole Innovation et Entreprises SPL (Local Public Company)... ... 11

Action 4: Facilitating service provisions to aviation industries and airport services for corporate employees in the north-west ...13

to develop the aviation and space excellence campus14				
Action 6: Implementing territorial pacts with the aviation and space sectors				
AMBITION 3: Toulouse, a fast-track metropolis for developing strategic sectors and campuses of excellence				
Action 7: The Oncopole campus: extending the reach of the Oncopole future-focused healthcare campus				
Action 8: The Francazal campus: giving fresh impetus to innovative and carbon-free mobility16				
Action 9: The Grand Matabiau campus: developing the digital, AI and cybersecurity campus				
Action 10: The MEETT event-driven centre				
AMBITION 4: Toulouse, a metropolis focused on local economy and development				
Action 11: Tourism: supporting the sector through a proximity approach				
Action 12: Agribusiness: supporting the sector within the scope of the Territory's Agriculture and Food Project				

Action 5: The Toulouse Aerospace campus: continuing

Action 11: Tourism: supporting the sector through a proximity approach	C
Action 12: Agribusiness: supporting the sector within the scope of the Territory's Agriculture and Food Project]
Action 13: Developing and enhancing a balanced and diversified local commercial offer over the territory	l
Action 14: A circular economy: reducing consumption of resources and quantities of waste and creating wealth by developing local production22	2
Action 15: Cultural and creative industries: supporting the sector to turn it into an economic lever	3
Action 16: The social and solidarity-based economy: maintaining Toulouse Métropole as a territory leader in social innovation	4

AMBITION 5: Toulouse field of h to transfo

Action 17: B and enhancir

Action 18: E and continuir

Action 19: S and the ecor and channel via innovatio

AMBITIO Toulouse metropol Europe ii

Action 20: of Toulouse tourist and

Action 21: H for the territ European ar

AMBITIO Toulouse metropol

Action 22: of job creati businesses

Action 23: by pursuing

n o. . confirming its European conking in	the
e, confirming its European ranking in	
higher education, research and innov	
orm its economic fabric	20
Boosting the dynamic student community	24
ng attractiveness	26
Becoming a European benchmark in initial	
ing training in our priority sectors	26
	20
Supporting interactions between higher education	n
nomic fabric, fostering enhancement	
lling R&D through to businesses,	
on and technology transfer	26
N 6:	
e, an increasingly attractive	
lis at international level involving	
n key projects	27
Fotos dia a the estimation and estimate the	
Extending the attractiveness and external reach Métropole, a destination of economic,	
event-driven excellence	28
	20
Heightening our capacity to receive co-funding	
tory's policies and investments and intensifying	
nd international cooperation	28
N 7:	
e, an inclusive and solidarity-based	
lis supporting employment	29
Carrying out strong and proactive actions in favo	ur
ion for inhabitants in partnership with local	20
and players in the employment sector	29
Developing sustainable and responsible procurer	nent
demanding policies for our public contracts	
	-





Since the Métropole was created in 2015, we have constantly asserted commitment to developing our territory, as well as enhancing its attractiveness and quality of life. Even more so during the health crisis, we worked hand in hand with other institutional players to provide wide-ranging support for our businesses and sectors experiencing difficulties and subsequently to take an active part in boosting our economy's recovery. Our €95M stimulus plan was a key factor in underpinning our economic fabric and securing local jobs.

Even if the health crisis is not yet totally part of history, our ambitions are unaffected and we believe more than ever in the peerless potential of Toulouse and its Métropole.

TITLE

Polle

Jean-Luc Moudenc Mayor of Toulouse President of Toulouse Métropole

EDITORIAL

We have a treasure-trove of future-focused talents, proven leading players and dynamic project developers who, day by day, are recruiting, creating, innovating and undertaking actions.

We are committed to working alongside them in order to provide support on their road to success and help the whole population living in our Metropolitan area have access to a trade, a job, training programs or an apprenticeship.

In order to set a common course for the future, we have, together with local partners, drawn up a roadmap reflecting our ambition to back our sectors and foster the emergence of new economic leaders.

While the harbingers of decline and those with defeatist attitudes paint pictures of industrial collapse, our driving forces have shown their abilities to bounce back from an unprecedented health crisis. This is the spirit with which tomorrow's mobilities will be forged, as for example with the electric aircraft.

Our template is one of innovation fostering human and environmental progress, based on the quality of life, our creative capacity and the fathomless resources of our youth and, as such, this model drives us towards a promising, innovative and sustainable future. This is the movement we invite you to join.

INTRODUCTION

Toulouse Métropole has drawn up this roadmap in a collaborative spirit and with a partnership-based approach that encompasses a vast array of economic players.

Over the past few months, the Occitanie Region, Consular Chambers (the Chamber of Commerce and Industry of Toulouse Haute-Garonne, the Chamber of Trade & Crafts of Haute-Garonne, the Chamber of Agriculture of Haute-Garonne), Employer Organisations (MEDEF31 Mouvement des Entreprises de France, CPME31 Confédération des Petites et Moyennes Entreprises [Confederation of Small & Medium-sized Enterprises]), competitiveness clusters (Aerospace Valley, Eurobiomed, TOTEM, DIGITAL 113, La French Tech Toulouse) and business clubs organised around "Ambition Toulouse Métropole" have met to exchange and communicate information, and have contributed significantly to defining the ambitions and actions to be carried out within the scope of this roadmap. We should like to take this opportunity to thank them sincerely for their contributions.

The dynamic drive of France's 4th largest metropolis is underpinned by strong demographic growth, which, over time, has lead Toulouse's Metropolitan Area to become a true hub of research, innovation, creativeness and entrepreneurship.

As a world aviation capital, cradle of the space sector and on-board airborne systems, a metropolis of start-ups in the digital and AI spheres and headquarters of Oncopole, Toulouse Métropole each year for the past 5 has emerged as the favourite destination for students, according to the classification drawn up by the "L'Étudiant" guide. International ordering customers, SMEs, very small businesses, prestigious higher education establishments and universities, laboratories and R&D centres, clusters, incubators, myriad players of all sizes are present in close proximity, mutually enriching each other to form a highly dynamic innovative ecosystem that places Toulouse Métropole as a top-level economic centre.

KEY FIGURES

Our region of excellence features over:

> 22,000 researchers >400 research centres > 120, 000 students > 15,000 international students

For all that, the metropolis is facing a period of major upheavals, whether as a result of the health and economic crisis through which we are going, or more structural challenges of industrial change, ecological transition or new forms of mobility. Such challenges urge us to invent new patterns, heighten the way we interconnect and cooperate with other regions, including at international level, but also to develop closer ties with the local economic fabric, with large industrial or service enterprises. innovative mid-caps, SMEs or very small businesses in emerging sectors.

Set out in its 2022- 2026 Innovation - Economy - Employment - Europe - International Reach roadmap, Toulouse Métropole's ambition is, at both concrete and operational levels, to take up the core challenges that the metropolis and its extended territory have to face: debottlenecking transport, the worksite on the 3rd underground line aimed at reducing the carbon footprint. preparing the arrival of the LGV high-speed line, developing innovative and carbon-free forms of mobility, while ensuring the tranquility, safety and proximity of citizens and enterprises alike.

The Territorial Climate-Air-Energy Plan (PCAET) currently being evaluated and passed in 2019 by Toulouse Métropole has mobilised citizens and economic players to think about targets of eco-mobility, producing local renewables and peri-urban agriculture, all of which require collective exemplarity in the areas of building-energy or water-cycle management.

The aim of this document is, for 2026, to lay the foundations of a new roadmap for economic development in line with the Territorial Climate-Air-Energy Plan which represents a common base of orientations shared between economic players and all partners in the ecosystem.

In collaboration with the Regional Council of Occitanie, the preparatory joint work ensures that our roadmap will constitute Toulouse Métropole's contribution to the Master Plan for Economic Development, Innovation and Internationalisation of the Occitanie Region.

Founded on an innovative and sustainable

More broadly, this roadmap intends to structure our development model and our economic identity

policy of diversification essential to the local economic fabric and on a marked commitment to preserve the environment and implement ecological transition, the roadmap underscores our ambition to move regional innovations into the fast track for a more sustainable and inclusive metropolis.

Toulouse Métropole will be prioritizing investment in the most promising fields, those that will create tomorrow's of tomorrow. that will create tomorrow's jobs, thereby confirming its world and European lea-

dership in the changing aviation and space sectors and accelerating its development in the healthcare economy and medicine of the future on the one hand and innovative, carbon-free forms of mobility on the other. Digital transition and AI will be core concerns for all these sectors throughout our territory.

Our metropolis will also be investing in other growth relay sectors which have or will have to become regional benchmarks:

the tourist sector, agribusiness and eating well locally, craft trades and neighbourhood stores, the circular economy, cultural and creative industries and the social and solidarity-based economy increasingly present throughout all sectors.

Toulouse Métropole has organized and consolidated its ecosystems around true sites of excellence, developing campuses, innovative structures and third places to boost tomorrow's strategic sectors. More broadly, our metropolis is implementing a development plan fostering economic activities which features quality land and real estate possibilities to attract businesses to set up in our region now and in the future.

Developing Toulouse Métropole at an economic level will require an open approach to dialogue on extending the territory to the Haute-Garonne County, in a joint, integrated vision, drawing on regional cooperation projects and reciprocity agreements. Alongside our neighbouring territories, we want to foster a shared economic vision of the future which will enable us to step up to the level of a top-flight metropolis of European stature, providing local jobs and backing ecological, social and digital transitions at the core of its development project for the urban area.

AMBITION 1

Toulouse, a metropolis investing in real estate structures, hosting, supporting, developing businesses and inspiring business leaders

> The Toulouse territory has numerous assets, including scientific and university excellence, a dynamic economic fabric featuring a strong industrial segment, a particularly close-knit innovative ecosystem, a rich cultural heritage and tourist infrastructure which have ridden the health crisis to maintain a high level of attractiveness.

> The economic fabric features strategic sectors built around the aircraft

> > and space segment, health-

care and medicine of the

future, innovative and

carbon-free mobilities.

the digital and AI sec-

tors, as well as agribu-

siness focusing on a

health-driven and lo-

cal approach to food.

sectors, in parti-

cular by attracting

new businesses to

set up, means that

Toulouse Métropole

has to offer ambi-

tious land and real

estate possibilities.

Its corporate pro-

perty offer must

be attractive and

diversified, as well

as underpinning the setting-up

of projects in particular and meeting all

corporate needs with the most tailored re-

sidential infrastructure.

these

Developing

OUR ASSETS

- An attractive region
- Dynamic drive and entrepreneurial skills
- More than €221M injected by TM over 5 years (+17.5% as against the previous term of office)
- Over 100 new businesses set up and supported annually
- Pooled possibilities for hosting businesses with the Chamber of Commerce and Industry of Toulouse Haute-Garonne, the Chamber of Trade & Crafts of Haute-Garonne and the County Council of Haute-Garonne.

Where land for businesses is concerned. over the past ten years. 55 hectares have been taken up annually. Within the scope of the future PLUIH and under the Climate Resilience Act. it is important to define an economic development scheme which will meet the growing needs of businesses by focusing on optimizing existing land and property resources and thinking about development on an urban area scale.

Toulouse Métropole's incubators and business centres provide possibilities for fledgling businesses to be hosted in the metropolitan region, be supported while developing their economic model and consequently find residential opportunities.

Over the past 30 years, this building stock has been able to host and back over 400 businesses, 80% of whose headquarters are today located in the metropolitan area. These infrastructures have created over 3,300 jobs and their sustainability rate after 5 years is over 90%.

Toulouse Métropole is looking to achieve higher-range potential in support and services to these innovative businesses and in backing entrepreneurship through the "Toulouse Métropole Innovation et Entreprises" Local Public Company (SPL), in particular through investments for renovating corporate real estate.

The aim is also to make the "Mon Entreprise Pas à Pas" [My Business Step-by-Step] website shared with the Chamber of Commerce and Industry of Toulouse Haute-Garonne and the Chamber of Trade & Crafts of Haute Garonne more visible. by including the economic development service offer of the County Council of Haute-Garonne.

Our clear collective ambition is focused along 5 lines:

- > Developing our economic and industrial land and property resources
- > Renovating, moving up in range and optimizing our corporate real estate

KEY FIGURES Over

businesses nosted and supported in the 5 Toulouse Métropole incubators and 4 business centres

> Welcoming young entrepreneurs and start-ups better, including from a quality point of view > Facilitating the renewal of real estate possibilities

> Enhancing residential opportunities for business owners

Setting up a ready-to-act corporate property piggyback mechanism to ensure regional home growth and attract new businesses has now become an essential strategy.

ACTION 1

INCREASING THE CAPACITY AND QUALITY OF HOSTING FOR OUR BUSINESSES VIA A STRATEGY FOR DEVELOPING AND MAKING AVAILABLE LAND AND REAL ESTATE TO FOSTER AND BACK HIGH-**GROWTH POTENTIAL BUSINESSES**

Within the scope of the future PLUIH and beyond the metropolitan area, in collaboration and partnership with public bodies of inter-municipal cooperation (EPCIs), in a shared vision of the greater Toulouse conurbation (SCOT), securing economic real estate possibilities to meet the future needs of businesses and particularly those in the industrial sector.

Being able to achieve balance between residential property, economic property and redevelopment of industrial properties, which could, if needs be, include re-allocating land or property in favour of economic development and, in collaboration with all stakeholders, fostering the emergence of new models of more concentrated innovative construction that take on board ecological challenges (urban heat islands – UHIs – in particular).

Maintaining and/or gradually redeveloping the 115 economic activity zones in partnership with the municipalities of Toulouse Métro-

pole to ensure that they remain attractive and oversee their quality of use (cleanliness, lighting, safety & security, signage, services).

Identifying brownfields on the Toulouse Métropole territory, paying particular attention to tertiary brownfields with the aim of using already artificialized zones and hosting businesses, while respecting new environmental regulations.

> Achieving between 80 and 100 hectares of land available over 5 years, while respecting the challenges for halving the use of natural, agricultural and forestry areas (ENAF) by 2030, all of which will be core features of the new PLUIH.

ACTION 2

FOSTERING THE DEVELOPMENT OF INNOVATIVE FLEDGLING BUSINESSES BY MODERNISING HOSTING FACILITIES AND ENHANCING SERVICE QUALITY LEVELS VIA THE TOULOUSE MÉTROPOLE INNOVATION ET ENTREPRISES SPL (LOCAL PUBLIC COMPANY)

Engaging the plan to modernize real estate stock of incubators and business centres to meet energy transition challenges and offer businesses a framework to showcase their innovations.

Proposing theme-based hosting for innovative businesses with pooled equipment tailored to dedicated sector needs.

Fostering the development of innovative hosted businesses by providing qualified support, offering dynamic animations and events created by the incubator network and facilitating access to the various structures implemented by Toulouse Métropole.

Maintaining the support drive for businesses hosted in incubators via infrastructures of the Chamber of Commerce and Industry of Toulouse Haute-Garonne.

- > Managing our real estate stock for hosting innovative businesses (5 incubators and 4 business centres) and investing €7M in renovation over the next 5 years. including the Pierre Potier sites on the Oncopole Campus and le Perget located in Colomiers, representing 7,500m².
- > Proposing a property piggybacking solution for industrial businesses using innovative mechanisms.

ACTION 3

DEVELOPING INNOVATIVE MECHANISMS AND PARTNERSHIPS TO HONE SUPPORT FOR OUR **BUSINESSES AND CRAFT TRADES**

Offering high-quality, proximity-based support to businesses, with facilitated access to public mechanisms, including financial help implemented by the State and the Regional Council, a social or technological experimental mechanism, a Toulouse Métropole living usage laboratory and incubators.

In close partnership with the Chamber of Commerce and Industry of Toulouse Haute-Garonne and the Chamber of Trade & Crafts of Haute-Garonne, enhancing support for businesses when setting up, recruiting, training, seeking out funding (particularly capital investment funds) and company takeovers.

Pursuing the support work for innovative businesses carried out in partnership with French-Tech, in particular to help technology start-ups with industrial potential.

Maintaining the drive to back the creation of businesses using the mechanisms of the Chamber of Commerce and Industry of

Toulouse Haute-Garonne and the Chamber of Trade & Crafts of Haute-Garonne dedicated to creators.

Pursuing the support for setting up businesses in partnership with the County Council of Haute-Garonne.



- > Going from 40 to 80 businesses concretely supported per year, via the joint "Mon Entreprise Pas à Pas" platform.
- > Increasing the rate of transformation of businesses set up on the territory, i.e. 40 set-ups per year over 3 years.

AMBITION 2

Toulouse, a metropolis committed to industrialists in the aviation and space sectors, preparing our flagship industries to meet the changes to low-carbon aviation and the new-space era

> Toulouse is the European capital for the aviation and space sectors, hosting the world's leading sector industrial players. Our economy is bound up to this cutting-edge segment, whose whole value chain is represented here: training, research, design and production, test flights, operation, dismantling and recycling.

> The two sectors generate some 35,800 direct jobs in the metropolitan area and 85,000 over the Occitanie Region.

OUR ASSETS

- Training excellence • Presence throughout the whole
- value chain
- Number of sector jobs
- Technological skills & know-how
- Aviation market maintained after the health crisis
- French Recovery plan (France Relance) on low-carbon aviation
- Cultural Centres of exception with the Cité de l'Espace and Aeroscopia

Out territory has to maintain its position as aviation sector leader. a strategic field for France and Europe, by supporting its change in order to achieve societal aims of climatic transition by 2050. Decarbonizing the aviation sector is a core concern for the roadmaps of local leading industrialists and main research centres. Skills, trai-

ning, innovations, digitalization and artificial intelligence are the vectors, backed up by the competitiveness cluster of Aerospace Valley, the Technological Research Institute (IRT) and the Artificial and Natural Intelligence Toulouse Institute (ANITI).



Toulouse is also the historic site and cradle of the European space industry, whose leading national players provide some 12,000 jobs. As an example, the use of space technologies for the climate with Météo France, the Midi-Pyrénées Observatory with Mercator Ocean for monitoring the oceans, constitutes real growth leverage, maintaining our rank as the European space capital. In this respect, the higher education, research and innovation segment of the 2021-2027 State-Region Plan Agreement helps Toulouse Métropole draw up priorities in its investments on key research projects in the fields of climate and space data.

ACTION 4

FACILITATING SERVICE PROVISIONS TO AVIATION INDUSTRIES AND AIRPORT SERVICES FOR CORPORATE **EMPLOYEES IN THE NORTH-WEST** OF THE METROPOLIS

Committed to developing service provisions in the aviation and airport zone (3rd underground line, cycling network, bus lanes, rail connections and enhanced fluidity for road networks), within the scope of the future Airbus-Toulouse Métropole partnership contract replacing the Airbus Pact. The aim is to facilitate access to sector sites to underpin development.

> Investing some €18M on road infrastructures and some €16M on the cycling network and cycling connections for these zones over the next 5 years.



THE TOULOUSE AEROSPACE CAMPUS: CONTINUING TO DEVELOP THE AVIATION AND SPACE EXCELLENCE CAMPUS

These sectors include in particular the fields of excellence of on-board systems and observing the earth and oceans, as well as the sciences of materials and energies.

On the Toulouse Aerospace campus, synergizing public and private research organisations, higher education centres (Espace Clément Ader, the Jacqueline Auriol Training Centre and B612) that are true benchmarks, as well as French and international businesses of all sizes. The Toulouse Aerospace campus is now a reality where interactions are on the increase.

The real estate offer is staggered over time. It is tailored (premises for sale or rent, offices and technical workshops) and has exemplary flexibility when it comes to dividing up options.

Hosting businesses in an eco-district, at the heart of the Toulouse Aerospace campus, served by numerous forms of efficient public transport (bus, future 3rd underground line).

> Hosting target sector businesses, up to 12,000m² per year, over the next 5 years, as against the current 4,500m².

KEY FIGURES

The Toulouse Aerospace campus is an extension of the scientific and university campus of Ranqueil and has over 30,000 students. It is a high-growth urban area sector that already provides over 63,000 jobs.

14

AIM

To bring together institutional and industrial players, help them gain technological *competitive edge and meet* market needs against the backdrop of regional change



MIMPLEMENTING TERRITORIAL PACTS WITH THE AVIATION AND SPACE SECTORS

Implementing an aviation territorial pact with industrialists, the Region and the State, on the one hand, and a space territorial pact with players in the field, the Region and the State, drawn up in close collaboration with the Aerospace Valley centre, on the other.

Ensuring consistency of actions and investments to foster the development of a low-carbon aircraft and an ecosystem conducive to using sustainable fuels and developing services in the space sector, essential to maintaining our European ranking.

Gaining technological competitive edge as a precursor to low-carbon aviation (energy sources for propulsion, structures, systems, ground operations, AI, 4.0 production, recycling...) and guaranteeing job sustainability, with the help of experts recruited in these fields.

An "aviation special" roadmap will be proposed to ensure convergence of joint priority actions between institutional partners and businesses.

Anticipating tomorrow's space challenges through its use for climate, the environment and oceanography, defence, space exploration, non-terrestrial 5G/xG communications and industrialisation of nanosatellites, using in particular a dedicated "space special" roadmap.

> Carrying out the actions making up the Pacts over the next 5 years

AMBITION 3

Toulouse, a fast-track metropolis for developing strategic sectors and campuses of excellence

> Around a campus of excellence, our ambition is to propose a pertinent address to any innovative business where the ecosystem will contribute to its development.

> In 2020, as a result of the health crisis, the aviation sector bore the full force of the sudden and drastic drop-off in air traffic, with its consequent cancellations or postponements of aircraft purchase orders. The Toulouse metropolis had to face up to significant difficulties affecting its engines of growth.

> The health crisis therefore illustrated the need to review our models of economic development and speed up the diversification of our economy into other sectors.

> These new development models must be based on the assets of Toulouse's territory. in particular scientific and university excellence, the presence of structured industrial sectors and its innovative ecosystem.

> Toulouse Métropole is aiming to define itself as a genuine partner committed to

> > tioning itself as a territory for projects which provi-

• The presence over the territory of players in tomorrow's strategic sectors

OUR ASSETS

- An entrepreneurial potential fostering diversification
- The development of campuses and an event-driven centre
- R&D centres: Dedicated business parks

and innovations in its various future sectors.



The strategy for accelerating the economic diversification of Toulouse Métropole works as a result, among other things, of national recovery strategies and the *major "France 2030" future* investment plan

concrete operations and posides fast-track impetus for the development of

Toulouse Métropole intends to help strategic territory sectors and ecosystems have an address and true places of excellence, centered around campuses, which will foster diversification.

It also aims to support the silver economy structure by helping businesses adapt their product and service offers for senior citizens.

These campuses are the essential breeding grounds for enhancing the territory's attractiveness and international visibility, as well as for developing the research and industrial ecosystems of tomorrow.

The campuses also have a vocation to bring together the talents and innovations of each future sector so as to foster synergies between their various players.

The Toulouse Aerospace campus was presented in Ambition #2, and the other campuses will be outlined below.







THE ONCOPOLE CAMPUS: EXTENDING THE REACH OF THE ONCOPOLE FUTURE-FOCUSED HEALTHCARE CAMPUS

Promoting the value and transformation of academic and scientific strengths (oncology, gerontology, infectiology) in an industrial and economic development of future-focused medicine, centered more specifically on bioproduction. Backed by the contribution of the Eurobiomed competitiveness cluster, a more detailed roadmap, focusing on "future healthcare - Bioproduction", will be proposed to ensure convergence of our priority actions between institutional partners and businesses.

Attracting new players in the fields of healthcare and innovation, beyond cancer research and confirming the campus's pioneering role in future-focused healthcare.

Continuing to develop the industrial and services real estate offer of the Oncopole future-focused healthcare campus, including after leaving the Pierre Potier incubator, with a view to providing support for existing high-growth businesses.

Heightening communication and extending animation to enhance international visibility and consequently the attractiveness of the Oncopole future-focused healthcare campus.

- > Developing 70,000m² of public and private property over the next 5 years out of the 150,000m² available from the current right-to-build stock.
- > Reaching 8,000 staff on the campus over the next 5 years, representing 1,700 more jobs than today.

16





THE FRANCAZAL CAMPUS: **GIVING FRESH IMPETUS** TO INNOVATIVE AND CARBON-FREE MOBILITY

Hosting, on the Francazal campus, a talent pool of players in the field of technological innovation around a sector focusing on innovative and carbon-free forms of mobility (businesses, start-ups, researchers, students, private and public bodies), making up a world-ranking ecosystem.

Press on with the development of 38 hectares on the Francazal site with European excellence ranking in the fields of land and air mobility around the 3 centres of Energy, Experimentations and Industry.

Fostering the setting-up of innovative businesses in parallel with the work of depollution and development.

- > Developing 6 hectares over the next 5 years (Technocampus, rehabilitation of the officers' mess, the site's northern zone).
- > Backing the setting-up of the Technocampus, a centre for hydrogen and fuel cell experimentation, in addition to the Hyport hydrogen components testing facilities in the airport zone.

ACTION 9

KEY

FIGURES

nd

51.5

ecosystem

representing 7,9%

outside Paris for the number of digital jobs after Lyon with

jobs in the digital sector,

of employment

(source INSEE 2016)

THE GRAND MATABIAU CAMPUS: DEVELOPING THE DIGITAL, AI AND CYBERSECURITY CAMPUS

With 200 researchers from 33 laboratories, Toulouse, with the Interdisciplinary and AI Institute (ANITI), is aiming to become one of the world leaders in artificial intelligence, in particular in its healthcare, environment

> and transport (autonomous vehicle) applications.

> Making Toulouse an AI and cvbersecurity stronghold.

Unifying a digital ecosystem of excellence (DIGITAL cluster 113, research laboratories, industrial fabric, higher education and business clubs such as La Mêlée Numérique).

Backing the deployment of digital services in the territory to create in the Toulouse zone economic value in the data processing field (services, algorithms).

> Developing a real estate offer (incubators, business centres, offices...) and services dedicated to players in the digital, AI and cybersecurity fields at the future Matabiau campus to become a talent pool in digital innovation: businesses, startups, researchers, students, private and public bodies.

> Developing 50,000m² dedicated to the digital and cybersecurity fields, over the next 5 years, out of the 300,000m² of scheduled offices and tertiary activity premises.

ACTION 10

THE MEETT EVENT-DRIVEN CENTRE

Pressing on with the development of the event-driven, tourism and tertiary centre.

The economic centre has just been integrated into the area bordering on the new Exhibition & Conventions Park of Toulouse. the MEETT.

Optimizing the economic spinoffs of the MEETT by developing a "MEETT economic cluster" Mixed-Development Zone (ZAC), covering 42 hectares, with a provisional building programme of 158,000m² of floor area.





The "MEETT economic cluster" Mixed-Development Zone (ZAC) represents:

50,000 m² of professional activity premises

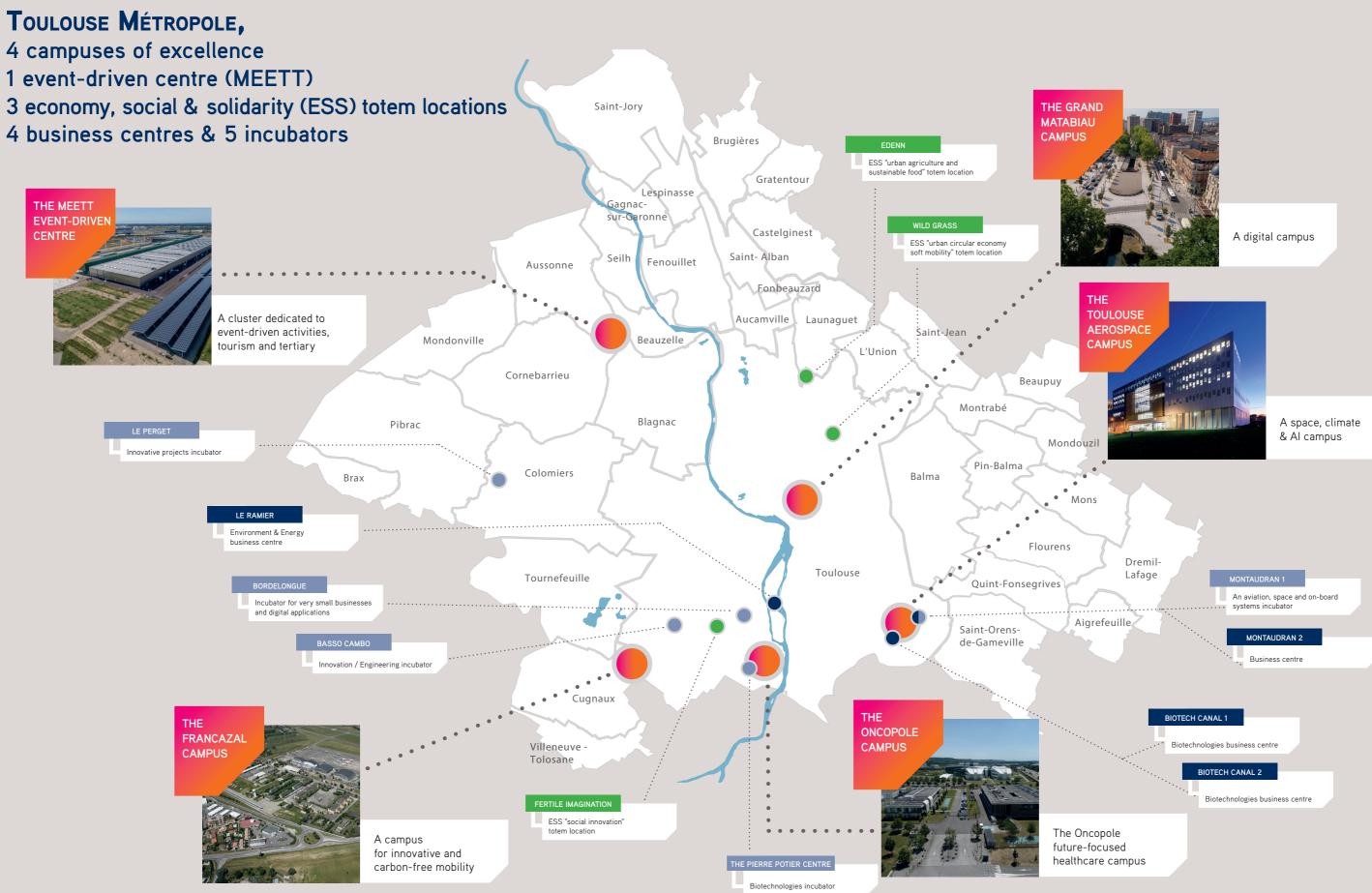
62,000 m² of tertiary activities



9,000 m² of shops > 10,000 m² of housing

This Mixed-Development Zone will help extend the services linked to the new MEETT infrastructure and consolidate its position on the event-driven market. The challenge is also to give value to investments within the framework of the Exhibition Park (primary roadways, tramway extension in particular) by commercializing well-managed adjacent properties.

> Commercializing 40,000m² of floor area (activity premises, offices, hotels) by 2026, in addition to the 35,000m² already commercialised (business village and hotels).



AMBITION 4

Toulouse, a metropolis focused on local economy and development

Following the health crisis, this local economy has helped underpin the resilience of the territory's overall economy, with businesses that have anchored their activities in local sectors, close to population and suppliers.

The metropolis's economic drive is also fuelled by a local economy which contributes to sustainable, carbon-free and solidarity-based development where jobs cannot be easily outsourced.

Toulouse Métropole has high-growth sectors, such as tourism, agribusiness, a locally-based "eating well" approach, craft and commercial trades, a circular economy, cultural and creative industries and a social and solidarity-based economy.

Around tourism and culture-based activities of international reach, the Métropole provides support for the commercial and craft sector, made up from a fabric of micro-en-



in the tourism/hostelry/ restaurant sector in Toulouse's metropolitan area (source URSSAF 2019)

The agribusiness and eating-well segments (a territorial agricultural and food project), as well as the circular economy meet the major local challenges for its citizens with regard to short food circuits, reduced carbon footprint, corporate resource-sharing (civil works sector), bringing producers into closer contact with consumers and evolution of consumer practices.

terprises inspired by tradi-

tional local know-how.

Toulouse Métropole also aims to give impetus and structure to high-innovation sectors, thereby creating new trades and skills, as well as benchmark references, in both cultural and creative industries or the social and solidarity-based economy.

ACTION 11

TOURISM: SUPPORTING THE SECTOR THROUGH A PROXIMITY APPROACH

The economic players in the tourism/hostelry/restaurant sector have been particularly affected by the health and economic crises.

Toulouse Métropole and the Attractiveness Agency are working hand in hand to support this sector with the masterplan for paid accommodation, tourist activities around rivers and canals, creating major cultural and sporting events, holding international congresses, as well as regional promotion through communication campaigns.

Proposing these players, with the help of the Attractiveness Agency, proximity-based support, access to public mechanisms, help with recruitment, set-up support and coming up with daily solutions to problems concerning public spaces (waste, parking, safety & security...).

> Supporting paid accommodations in the metropolitan area (13,000 rooms), to meet the crisis and foster their economic development throughout the territory.



ACTION 12

AGRIBUSINESS: SUPPORTING THE SECTOR WITHIN THE SCOPE OF THE TERRITORY'S AGRICULTURE AND FOOD PROJECT

Helping all inhabitants have access to healthy and sustainable local food to underpin quality, local and environmentally-friendly agricultural and food production. Award-winner of the National Food Programme, Toulouse Métropole adopted a metropolitan agricultural and food strategy in December 2018, under the Territorial Agricultural and Food Project (PAAT) within the Territorial Climate-Air-Energy Plan

(PCAET) in October 2019.

The Chamber of Agriculture is a strategic partner to this project. Having a seat on its Strategic Committee, it contributes to good governance and carries out partnership actions under a multi-year agreement. As a PAAT partner, the Chamber of Trade & Crafts of Haute-Garonne also provides support for food sector professionals.

Last but not least, the MIN (Marché d'intérêt national or National Wholesale Market) is the essential core mechanism of our distribution system, helping our producers achieve local and healthy food.

- > Preserving agricultural land and helping implement suitable protective mechanisms through an agricultural territorial diagnosis.
- > Providing support for farmers to implement agroecological practices.
- > Providing support for farmers to commercialize their products in local short circuits.



ACTION 13

DEVELOPING AND ENHANCING A BALANCED AND DIVERSIFIED LOCAL COMMERCIAL OFFER OVER THE TERRITORY

Trade and crafts account for over 15.000 businesses in the Toulouse Métropole territory.

These businesses fulfill three functions that are essential for district life: economic. social and local. They provide vital life blood to the territory, whether in the hyper-centre of Toulouse, the heart of towns or local urban centralities.

Despite the fact that Internet has somewhat changed consumer purchasing habits as a result of successive confinements, customers still plebiscite local shops. Consumers take into account ecological and human factors.

This form of local economy perfectly fulfills the expectations of increasingly urban households, whose motorisation level is decreasing and who are looking for quality. service. local answers and social links.

KFY FIGURES

The trade and crafts sector is one of the leading job creators, employing some

people



Against this backdrop, in order to guarantee and enhance the diversity and attractiveness of the commercial offer in districts and town centres, Toulouse Métropole has made the development and safeguarding of local trade one of its major objectives.

Providing support for structural changes in consumer patterns and committing itself to meet the challenges of ecological and digital transition (enhancing digital presence in shops, waste management and recycling...).

Developing and strengthening the local economy in urban centralities and commercial centres, while respecting a balanced mesh in commercial infrastructures.

Fostering setting-up and maintaining local shops and services in commercial centralities, while providing protection areas for shelf-space and lines (PLU and PLUIH) and commercial pre-emption rights.

Limiting and controlling the development of trade outside polarities and contributing to diversity within the urban fabric, with preferential zones for shops of over 500m².

Analysing the demands for creating commercial premises in urban projects while seeing that complementarity is maintained with existing commercial stock.

Fostering the creation of shopkeeper and craft associations.

Promoting trade: territorial marketing and communication campaigns.

- > Going from 40 projects being followed up within the framework of heightening the competitiveness of local commerce, by implementing digitization, to 100 projects over the next 5 years.
- > Going from 60 to 70 shopkeeper associations across the metropolitan area over the next 5 years, contributing to the creation of 2 new associations per year.

ACTION 14

A CIRCULAR ECONOMY: **REDUCING CONSUMPTION OF RESOURCES AND QUANTITIES OF** WASTE AND CREATING WEALTH BY **DEVELOPING LOCAL PRODUCTION**

......

Toulouse Métropole is aiming to accelerate the development of a circular economy in the metropolitan area. According to a study carried out by ADEME, re-using just 10% of manufactured components would offer the prospect of creating 15,000 jobs for the territory with a potential reservoir of 3 billion euros and an undeniable impact on the climate.

Implementing a circular economy strategy, as a major opportunity for energy transition, with a view to mobilising local players, creating jobs and reducing the carbon footprint of activities, in synergy with the Chamber of Commerce and Industry of Toulouse Haute-Garonne, the Chamber of Trade & Crafts of Haute-Garonne and associated federations.

Raising awareness of the existence of players in the repair sector under the Répar'acteurs label, participating in promoting the label to help the general public identify artisans who are committed to a repair and upcycling approach.

Turning the Francazal campus into one of the showcases for the circular economy and providing support for players in the civil works segment to channel their production practices towards reducing their carbon footprint (reducing inflows, products, materials...) and outflows (waste, greenhouse gas emissions) by substituting them with increased exchanges between local players. The European "Life Waste2Build" project, an innovative mechanism for optimising resources and recycling waste from civil works, will boost results where public procurement is concerned by prompting players to recycle their available materials where possible.

Supporting businesses in the economy for sharing material and immaterial resources to reduce on costs and waste, enhance innovation and generate more income.

- > Mobilising over 1,000 businesses around the circular economy over the next 5 years.
- > Reducing the civil works impact by 35% in the consumption of resources and waste production (reducing recourse to raw materials and less use of natural resources on worksites).
- > Implementing a mechanism which facilitates placing entities in contact with each other and sharing material and immaterial resources involving some 200 businesses by 2026.

ACTION 15

CULTURAL AND CREATIVE **INDUSTRIES: SUPPORTING** THE SECTOR TO TURN IT INTO AN ECONOMIC LEVER

Cultural and creative industries include all artistic and cultural sectors which place artistic creativeness at the core of their production, such as the visual arts, the performing arts, cultural industries (music, cinema, book publishing ...), but also industries which integrate artistic creativeness as part of their production such as architecture, design, fashion, video games or film animations.

At the crossroads of economy and culture, creative and cultural industries are an important sector for Toulouse Métropole, in terms of employment with some 21,900 jobs and 16 schools of higher education.

Promoting Toulouse's businesses in cultural and creative industries and their works at local, national and international levels.



Promoting training programmes for young people for film animation and video games in education establishments in the metropolitan area.

Participating in the Horizon Europe programme, at the European Institute of Innovation & Technology, for cultural and creative industries and seeking out opportunities for funding.



- > Developing 5,000m² at the Grand Matabiau digital campus for hosting and supporting businesses in the cultural and creative industry sector.
- > Achieving 23,100 jobs, representing an increase of 5.5% over the next 5 years.

ACTION 16

THE SOCIAL AND SOLIDARITY-BASED ECONOMY: MAINTAINING TOULOUSE MÉTROPOLE AS A TERRITORY LEADER IN SOCIAL INNOVATION

Highly dynamic over the metropolitan area of Toulouse, the Social and Solidarity-based Economy (ESS) accounts for 3,100 establishments employing some 33,000 people; i.e. 8.3% of territorial jobs and 11.5% of private jobs. It has created some 2,500 jobs over 10 years, a growth rate of +8,4% between 2009 and 2018.

Among ESS businesses in the Métropole, numerous nuggets are regional and national ESS flagships.

Via the "Toulouse Impact" grouping and the "Territoire French Impact" label, pursuing long-term support of ESS businesses and social innovation, as major driving forces to bring about the economic, social and ecological transition of the territory and generally boosting this asset.

Strengthening and driving the ESS local ecosystem to help ramp up skills, develop projects, cooperation and reach in this sector.



Social and Solidarity-based Economy (ESS) =

> 3,100 establishments > 33,000 employees > 8,3% of territorial employment > 11,5% of private jobs

ESS has created some 2,500 jobs in ten years, representing a growth rate of +8.4% between 2009 and 2018.



Consolidating the ESS Business Traiectory (First Brick social innovation incubator, ADDRESS Trajectory, Local Support Mechanism, solidarity-based funding...) with new mechanisms meeting the needs of business leaders in support, funding and accommodation.

Meeting three social and territorial challenges in a collective and cross-functional way: economic and social inclusion, the circular economy and urban agriculture & sustainable food.

Creating a metropolitan mesh of federative ESS totem locations and ESS showcases which host businesses, boost innovation and cooperation and set up links with citizens.

- > Going from 130 to 160 backed projects per year over the next 5 years.
- > Continuing creating and consolidating 2,000 jobs over the next 5 years.

AMBITION 5

Toulouse, confirming its European ranking in the field of higher education, research and innovation to transform its economic fabric

> As France's second-leading student city, our metropolis is a territory of academic excellence with some 120,000 students and 13.000 staff in 31 establishments of higher education and research bodies of the Federal University.

> For this reason, Toulouse Métropole has decided to earmark backing to the tune of €32M in investment loans for Higher Education and Innovation Research under the 2021-2027 State-Region Planning Contract, with particular emphasis on projects of scientific excellence.

> The Federal University of Toulouse Midi-Pyrénées is a leading partner in the socio-economic world, with numerous shared bodies to achieve territorial coherence.

> The need to enhance the international visibility of the academic centre is recognized on all sides. Clear scientific strategy, revamped infrastructure, develop-

ment of new training courses in strategic sectors of excellence in the territory - all

• 2nd-leading student city in France with 120,000 students in 2021-2022, +24.70% in 10 years and 13% of international students

• Toulouse's scientific potential

- Backing from Toulouse Métropole (€32M) for Higher Education and Research & Innovation under the 2021-2027 State-Region Planning Contract
- · Precise definition of Toulouse's academic project

these will upgrade the ranking of Toulouse University at international level.

Toulouse Métropole and the Occitanie Region, Patrick Lévy, the former Chancellor of the



OUR ASSETS

TO BE NOTED

Student entrepreneurship is also a vector for creating wealth and jobs. Toulouse *Métropole is aiming to enhance* its support actions for student initiatives throughout their entrepreneurship trajectory.

On the initiative of

Grenoble-Alpes University, is helping Toulouse players define a strategy aimed at giving fresh drive to Toulouse's academic site, together with support for the new scientific and educational project of the Federal University of Toulouse Midi-Pyrénées (UFTMP).

Continuing to develop collaboration and cooperation between researchers and students of the various establishments. in close connection with economic players, must be encouraged for the technological transfers that this creates. Around the "green chemistry" cluster, for example, that brings together some 50 or so businesses, the territory has skills in this field with numerous applications in the sectors of agribusiness, well-being and cosmetics. As a leading academic site, the CNRS coordination chemistry laboratory fosters technological transfers (processes for sustainable chemistry; materials for sensors, electronics, nanotechnologies; new medication).

The aim is also to enhance the reach of numerous Toulouse training centres (CFA, universities and Higher Education Schools) to boost Toulouse Métropole's renown in the field of higher education.

Maintaining Toulouse Métropole on the national and European map of university sites of excellence.

novative and carbon-free forms of energy via our development skills and funding earmarked to higher education, research and innovation.

ACTION 17

BOOSTING THE DYNAMIC STUDENT COMMUNITY AND ENHANCING ATTRACTIVENESS

It is essential to work collectively with the Federal University, the Region and other partners to maintain a dynamic student community, a yardstick for a future-focused economy.

Supporting far-reach animation actions and ensuring that the three key factors for success (accommodation, animation and teaching) are up to the par of excellence.

Coordinating university and tourism players to carry out a collective and concerted action to ensure that diploma-awarding ceremonies become an opportunity of tourist development for student families.

Developing tourist packages for student families.

> Going from 120,000 to 130,000 students over the next 5 years, representing a growth of 8%, of which 15% of international students as against the current 13%.

ACTION 18

BECOMING A EUROPEAN BENCHMARK IN INITIAL AND CONTINUING TRAINING IN OUR PRIORITY SECTORS

Fostering the development of new initial and continuing training courses of excellence, as, for example, in the field of in> In partnership with the National Education Department, the Regional Department for the Economy, Employment, Work and Solidarity, the Region and industrialists, creating and attracting a significant number of new courses, over the next 5 years, to support our priority sectors.



SUPPORTING INTERACTIONS **BETWEEN HIGHER EDUCATION AND** THE ECONOMIC FABRIC, FOSTERING ENHANCEMENT AND CHANNELLING **R&D THROUGH TO BUSINESSES.** VIA INNOVATION AND TECHNOLOGY TRANSFER

Boosting our partnership with Toulouse Tech Transfer and Toulouse White Biotechnology so as to be quick to identify any potential project for transferring technology to the economic fabric and backing it in all phases of fulfilment (creation, funding, partnerships, access to public mechanisms, setting-up...).

Organising meetings between businesses and students in collaboration with universities, higher education schools and CROUS (Regional Centres for University and School Works).

Facilitating contacts, via the employment platform, between businesses and students and highlighting requests for courses and jobs for students.

> Providing support for 24 innovation and technology transfer projects over the next 5 years, within the framework of the 2021-2027 State-Region Planning Contract and in partnership with Toulouse Tech Transfer and Toulouse White Biotechnology.

AMBITION 6

Toulouse, an increasingly attractive metropolis at international level involving **Europe in key projects**

> The aim is to develop key factors of attractiveness -innovative technologies, economic drive, culture, education, training, mobilities, quality of life- which help attract talents, investors, businesses, major events, artists and creators. In the wake of the health crisis, it is also important to pay particular attention to leisure and business travel.

> The two attractiveness agencies, metropolitan (Attractiveness Agency) and regional (AD'OCC, Agency for the Economic Development of the Occitanie Region), act jointly on various promotion levers, as well as those highlighting the territory's economic, tourist and student attractiveness, via an ambitious strategy of regional marketing.

The Attractiveness Agency, Toulouse Métropole and the Chamber of Com-

OUR ASSETS

- MEETT
- Convention fund
- Capacity for hosting and accommodation
- Quality of hosting, Occitan culture, gastronomy
- Building on the strongpoints of our image

merce and Industry of Toulouse Haute-Garonne are committed to promoting exhibition venues and conventions throughout the territory, in particular the MEETT which is helping Toulouse achieve its ambition to become France's 3rd-leading location for major congresses with annual economic

spin-offs estimated at over €230M.

After receiving more than €60M in European funding over the past five years and signing new cooperation agreements with the cities of Montreal, Casablanca, Sevilla and Tunis with some 19 cooperation actions on a global scale, Toulouse Métropole is resolu-

BENCHMARK

The ambition of Toulouse

reach on the other.

Métropole is focused on its

international attractiveness, on

the one hand, and its European

tely aiming to extend its international reach by 2026.

Europe must be brought in to support the public policies of the Métropole and municipalities, and consequently with the territory's investment projects. Funding has more than doubled between the last two terms of office, and will almost be doubled again during the present term of office. Against the backdrop of European initiatives (recovery plan, new initiatives), the ambition is to exert influence upstream and pursue our capacity to seize European funding opportunities by ensuring our efficient presence in local, national and European networks.

Reaching out at international level must foster balanced, targeted, sustainable and inclusive exchanges for the territory's public and private players. These actions are also aimed at our historic links, such as Aéropostale, without forgetting solidarity-based or emergency actions, in collaboration with diasporas and Toulouse consular bodies. Via key worldwide cooperations (Montreal, Tel-Aviv, Atlanta, Casablanca, Tunis, Hanoi...), we are looking for quality relationships with our partners and measurable results by utilizing all available forms of external funding.

ACTION 20

EXTENDING THE ATTRACTIVENESS AND EXTERNAL REACH OF TOULOUSE MÉTROPOLE. A DESTINATION OF ECONOMIC, TOURIST AND EVENT-DRIVEN EXCELLENCE

In close synergy with AD'OCC (Agency for the Economic Development of the Occitanie Region), the ambition of the Attractiveness Agency of Toulouse Métropole, with the Chamber of Commerce and Industry of Toulouse Haute-Garonne, is to exert all possible leverage to support the upheavals we are facing: new models of leisure, business and event-driven tourism, the territory's visibility and reach, and support for major congresses. Its ambition is also to support Toulouse's offer in terms of accommodation. cultural infrastructures and "eating-well".

Fostering a qualitative approach with regard to innovative, exogenous businesses set up, in synergy with existing businesses.

Developing the metropolis's tourist attractiveness, focusing on its culinary and gastronomic assets and building on its "eating-well" and "good lifestyle" image, thereby contributing to highlighting the trade of food professionals and the development of the agribusiness sector, particularly under reciprocity agreements with EPCIs (intercommunal bodies) near the metropolis.

Developing sustainable tourism which fulfills the expectations of visitors and professionals alike, taking into account economic, social and environmental impacts in line with Global Destination Sustainability Index criteria.

Highlighting nature-in-the-city tourist activities (river activities, excursions on foot or by bike...).

Redirecting prospection and promotion actions to local clientele in France and in the region to limit the carbon footprint left by travelling visitors.

> Attracting more congresses of over 1,500 people.

> Providing support for changes in "4-seasons" leisure and business travel with a target of 4.5 million overnight stays and 3 million entries to major tourist sites.

ACTION 21

HEIGHTENING OUR CAPACITY TO RECEIVE CO-FUNDING FOR THE TERRITORY'S POLICIES AND INVESTMENTS AND INTENSIFYING EUROPEAN AND INTERNATIONAL COOPERATION

Seizing funding opportunities from the European Union, the Ministry for Europe and Foreign Affairs and the French Agency for Development to back our projects and measure their impacts.

Making international cooperation more meaningful, more balanced, more inclusive and more sustainable.

Putting our territory on the map as a major European metropolis of international dimension (knowledge, excellence, training, research, economy, but also solidarity and reactivity to crisis situations).

> Going from €62M of European funds, over the previous term of office, to €120M during the current term of office (European recovery plan, 3rd underground line...).

- > Extending the qualitative approach in cooperative actions by enhancing partner involvement and aiming to double the number of partners.
- > Going from 245 European learning mobilities over the previous term of office to 1,000 over the next 5 years.

AMBITION 7

Toulouse, an inclusive and solidarity-based metropolis supporting employment

Its economic drive cannot mask the fragile situations and inequalities that characterize our metropolis, which concern populations with social and economic problems and numerous districts where the risk of dropping out is a real possibility.

Those remote from employment must be able to benefit from dedicated actions that will foster insertion. In addition, despite the fact that businesses create jobs, they often find it difficult to recruit.

Toulouse Métropole must set up links between the territory's economic development and local employment and intervene when supply fails to meet demand, in particular for those who have difficulties in accessing the workplace. The challenge is to meet the requirements of trades where there is imbalance between supply and demand (hostelry, restaurants, crafts) and promote the trades of tomorrow (circular economy, energy transition, new mobilities...).

OUR ASSETS

- A job-creating economic fabric
- Observed economic recovery
- Support mechanisms for
- those remote from employment • Recovery of dynamism
- in the aviation sector
- Reservoirs of future jobs in strategic sectors
- Platform for employment
- City of Employment

Public procurement must evolve towards a policy of sustainable and responsible purchasing to gain powerful transition leverage for territories towards more virtuous and inclusive economic models.



ACTION 22

CARRYING OUT STRONG AND PROACTIVE ACTIONS IN FAVOUR OF JOB CREATION FOR INHABITANTS IN PARTNERSHIP WITH LOCAL BUSINESSES AND PLAYERS IN THE EMPLOYMENT SECTOR

Fostering job creation opportunities for inhabitants in local businesses, by organising meetings in an innovative format throughout all municipalities in the metropolis and districts of Toulouse: website job platform, employment forums, job dating as close as possible to labour market areas and identified needs.



Coordinating on a metropolitan scale the organisation and communication of actions/ events for job creation for all metropolitan municipalities in order to enhance the visibility of actions carried out and contact as many people as possible.

Fostering the promotion of craft trades, in particular via apprenticeships, a way of training for young people that will facilitate their vocational insertion.

Pursuing the promotion for including insertion clauses in public local authority contracts, in worksites of the National Agency for Urban Renovation (ANRU) and with private project owners for their own purchases.

Highlighting trades with imbalance between supply and demand and the trades of tomorrow, by helping businesses communicate about their professions and skill needs and providing support for them when recruiting via PLIE (Local Plan for Insertion through Employment).

Facilitating access to all inhabitants of urban-policy districts to measures of common law proposed by players in the public employment service, in collaboration with the local authority.

Disseminating and promoting the partnership charter between PLIE and businesses, a reciprocal collaboration charter enabling businesses to find the skills they are looking for and fostering recruitment of PLIE participants to make its actions more visible and enhance participant employability.

- > Reaching a total of 400 partner businesses of the new "job platform" of Toulouse Métropole by 2026.
- > Going from 350 PLIE partner businesses to 500 over the next 5 years.
- > Going from 530,000 hours of insertion in 2020, generated by clauses and insertion contracts (through public procurement, on ANRU worksites and major public and private worksites) to 790,000 hours in 2026, representing 50% growth.

ACTION 23

DEVELOPING SUSTAINABLE AND **RESPONSIBLE PROCUREMENT BY** PURSUING DEMANDING POLICIES FOR OUR PUBLIC CONTRACTS

Pursuing, in close collaboration with consular chambers, the dynamic approach to sustainable procurement in public purchasing by implementing the Schedule for socially and ecologically responsible procurement (SPASER), a genuine lever for fostering the territory's ecological and social transition.





- > Reaching 80% of works contracts that include circular economy deliverables over the next 5 years.
- > Going from €34M to €42M in our expenditure for businesses in the ESS sector over the next 5 years.
- > Exceeding 50% of purchasing families covered by the carbon footprint measure for logistics flow.
- > Exceeding 50% of sustainable product purchasing or procurement giving indications of origin and quality (including organic products) within the framework of service provisions of central food production and catering units.



Our acknowledgements go to:

The Chamber of Commerce and Industry of Toulouse Haute-Garonne The Chamber of Trade & Crafts of Haute-Garonne The Chamber of Agriculture of Haute-Garonne

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The Occitanie Region The MEDEF (Mouvement des Entreprises de France [French Employers' Organisation]) The CPME (Confédération des PME [Confederation of SMBs]) French Tech Toulouse Aerospace Valley Eurobiomed TOTEM Ambition Toulouse Métropole

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