

WHY IS TOULOUSE LEADING THE WAY AS EUROPE'S HUB OF INNOVATION?



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Invest in
Toulouse 
**VIRTUAL
ROUNDTABLE**

TABLE OF CONTENTS

TOULOUSE AT A GLANCE	03
TOULOUSE ECONOMIC DESTINATION	04
TOULOUSE DIGITAL ROUNDTABLE	07
CENTRE OF EXCELLENCE FOR THE HEALTH TECH OF TOMORROW	11
CENTRE OF EXCELLENCE FOR ARTIFICIAL INTELLIGENCE AND AUTONOMOUS TRANSPORTATION	13
CENTRE OF EXCELLENCE FOR AERONAUTICS AND SPACE	15

TOULOUSE AT A GLANCE



POSITIONING

- 4th largest French Metropolis
- 5 billion/year in R&D investment
- 1.3 million inhabitants
- 20,000 researchers
- 120,000 students
- World's capital of aeronautics
- European capital of space

ASSETS

- +1000 restaurants
- +150 venues suitable for meetings and events
- +100 sporting event and festivals per year
- +14500 hotel rooms
- +2000 hours of sunshine on average per year

TOULOUSE ECONOMIC DESTINATION

TOULOUSE ASSETS

- The ecosystem of Toulouse is especially favourable to the success of a new business. Project leaders will find that the area combines internationally renowned research centres, the headquarters of major providers of work on an international scale, a network of startups that are among the most dynamic in France and a concentration of very high-quality skills.
- Toulouse is an accessible city, with direct links to the other major cities of Europe thanks to an airport that continues to expand. It offers businesses that set up a base here and their employees the perfect balance between a dynamic working environment and an excellent quality of life.
- Toulouse Métropole is in the process of undertaking major projects that will further enhance the area's attractiveness. In the run-up to 2024, a 3rd metro line, Toulouse Aerospace Express, will connect the major areas of employment. The offer, unique in Europe, is structured around key themed hubs: Toulouse Euro Sud-Ouest, a business district devoted to high added-value services (consultancy, finance, banking, a creative district); Toulouse Aerospace, a campus for innovation in aeronautics, space research and onboard systems; Oncopole focuses on oncology and life sciences; Francazal Mobility Park is set to become the centre of excellence for robotics, drones, selfdriving vehicles and the transport of the future.

INVEST IN TOULOUSE

In the field of economic development, the mission of the agency and the Invest in Toulouse team is to attract new companies to the Toulouse area, in particular those that provide very high added value, such as R&D, engineering and prototyping. At the same time, the agency also targets the key aeronautics and space sectors, as well as emerging industries like digital and new technologies (on-board systems, intelligent transport, robotics and drones, smart city, the Internet of things) and life sciences (biotech, health, cosmetics). The clear objective is to aid the establishment of projects that will become the drivers for growth across the metropolitan area.



TOULOUSE DIGITAL ROUNDTABLE

PANELLISTS



Jean-Claude Dardelet
President Agence d'attractivité
Toulouse Métropole, Deputy
Mayor



Craig Johnstone
Chief Operating Officer, Evotec



Corinne Grillet
CEO, Alygne, Inc.



Gilbert Gagnaire
CEO, EasyMile



Nicholas Cullen
Solicitor of England and Wales
- Avocat au Barreau de
Toulouse, Cabinet d'avocats
ALTIJ





Jean-Claude Dardelet



President Agence d'attractivité
Toulouse Métropole, Deputy Mayor

Jean-Claude Dardelet is Deputy Mayor of Toulouse in charge of International partnerships and European funding. He is Vice-President of Toulouse Metropole where he holds the same responsibilities, Chief Executive Officer of the Toulouse Metropole Development Agency "Agence d'attractivité de Toulouse Métropole" and also President of the Cité de l'Espace.

An international career in the space industry led Jean-Claude Dardelet to hold highest positions in strategy, business development and Public affairs with credentials, in particular in the frame the EGNOS, Galileo and Copernicus European programs since their earliest stages. Jean-Claude Dardelet is graduated Engineer in Aeronautics and Space with a postgraduate in international trade. He is auditor postgraduate at Cycle des Hautes Etudes Européennes (Ecole Nationale d'Administration). He's travelled the world. He is today committed to promoting the attractiveness of the Toulouse metropolis both on the international stage and in the concert of the major European metropolises.

ABOUT AGENCE D'ATTRACTIVITÉ TOULOUSE MÉTROPOLE

One sole development agency for showcasing Toulouse! The merger of Invest in Toulouse, Toulouse Convention Bureau, Toulouse Métropole Tourist Office and Toulouse Film Office brought all the bodies responsible for the promotion of the area to the general public under one umbrella. The mission of the Toulouse Métropole business, meetings & tourism development agency is to conceive and direct the marketing activity for the Toulouse area in order to bolster its national and international notoriety, seek out wealth and job creators and to improve the existing conditions for welcoming them.

Craig Johnstone



Chief Operating Officer, Evotec

Craig was appointed Chief Operating Officer of Evotec in 2019 after joining the company in 2012. He served in various roles during that time, combining his passions of scientific drug discovery leadership with operational effectiveness improvements within Global Chemistry and Global Drug Discovery functions. Locally, Craig is Site Head in Toulouse and the President of Evotec (France).

Before joining Evotec, Craig worked at AstraZeneca Pharmaceuticals for many years, where he worked in oncology, inflammation and cardiovascular/diabetes research programs as well as functional leadership roles including LEAN deployment. Craig has also worked in the biotech and consulting sectors.

Craig holds a PhD in organic chemistry, and is a Fellow of the Royal Society of Chemistry.



ABOUT EVOTEC

Evotec is a life science company with a unique business model that delivers on its mission to discover and develop highly effective therapeutics and make them available to the patients. The Company's multimodality platform comprises a unique combination of innovative technologies, data and science for the discovery, development, and production of first-in-class and best-in-class pharmaceutical products. Evotec leverages this "Data-driven R&D Autobahn to Cures" for proprietary projects and within a network of partners including all Top 20 Pharma and over 800 biotechnology companies, academic institutions, as well as other healthcare stakeholders. Evotec has strategic activities in a broad range of currently underserved therapeutic areas, including e.g. neurology, oncology, as well as metabolic and infectious diseases. Within these areas of expertise, Evotec aims to create the world-leading co-owned pipeline for innovative therapeutics and has to-date established a portfolio of more than 200 proprietary and co-owned R&D projects from early discovery to clinical development. Evotec operates globally with more than 4,000 highly qualified people. The Company's 14 sites offer highly synergistic technologies and services and operate as complementary clusters of excellence.

For additional information please go to www.evotec.com and follow us on Twitter @Evotec and LinkedIn.



Corinne Grillet



CEO, Alygne, Inc.

Corinne is co-founder and CEO at Alygne. Prior to founding Alygne Corinne spent decades as Executive Leadership in various sized technology companies across North America, Asia Pacific, UK and Continental Europe, both in FinTech and AI. She has a passion for starting, scaling, and managing businesses across very different geographies and cultures. Her previous roles include Chief Customer Officer for Calypso Technology, where she was responsible for leading globally Revenue and Customer facing divisions in 21 countries, including launching and scaling up the Cloud/SaaS division. Before that, Corinne spent 10 years in Asia Pacific where she was Chief Operating Officer for Sophis Technology. She has overseen the opening and running of the six initial offices: Hong Kong, Singapore, Tokyo, Seoul, Beijing and Brisbane. She was also based in London between 2000 and 2004. Corinne studied engineering at l'École Polytechnique in Paris.

ABOUT ALYGNE

Alygne is an early-stage San Francisco and Toulouse-based startup that helps investors, consumers and companies align their actions with their values by providing objective information about a company, derived from public digital information and NLP (Natural Language Processing) technologies.

It creates transparency about companies' values and ESG efforts by collecting information about their behaviors and exposing it to investors and consumers.

For additional information please go to www.alygne.me and follow us on LinkedIn.



Gilbert Gagnaire

CEO, Easymile

Gilbert Gagnaire is a software engineer and visionary.

In 2014, he founded EasyMile to “change the world of mobility” bringing autonomous public transport solutions to life. His approach to innovation is pragmatic: building differentiation and uniqueness that address real-world problems. This is most evident in his steering to include material handling in EasyMile’s growing portfolio of vehicle solutions.

Over the course of his career, he has held R&D, consulting, business development, and senior management roles within a number of financial software companies.

Gilbert also co-founded Fermat in 1996, a software company providing risk management and compliance solutions to the banking industry. It was acquired by Moody’s in 2008. In between ventures he has traveled, backpacked, trekked, climbed, and skied around the world, and constructed a boutique hotel in North Bali. He applies this global perspective to EasyMile’s business and operations.



ABOUT EASYMILE

EasyMile is a leader in software and complete solutions for driverless goods and passenger transport, and the number one provider of autonomous shuttles in the world. It partners with blue-chip manufacturers to autonomize their vehicles with award-winning technology built on safety-by-design, ready for deployment today, with clear client benefits.

Since 2014, the company has become known for quality delivery and real-world deployments. EasyMile’s proven technology has driven autonomously in 300+ locations in more than 30 countries, over 1,000,000km.

With several mass operations around the world EasyMile was the first to deploy fully driverless at Level 4 of autonomous driving. It is also the first autonomous vehicle solutions provider to be ISO 9001:2015 certified.

EasyMile has more than 250 employees in five locations (Toulouse, Berlin, Denver, Singapore and Adelaide), doubling its headcount every 2 years.

For additional information, please go to www.easymile.com.



Nicholas Cullen



Solicitor of England and Wales -
Avocat au Barreau de Toulouse,
Cabinet d'avocats ALTIJ

Nicholas is a partner in Altij's data protection and corporate teams. Qualified to practice in England and France, Nicholas advises our international clients on a wide range of legal questions regarding their French activities.

An expert on data protection law, Nicholas advises clients on all aspects of GDPR compliance, including international data transfers, data breach management and the deployment of solutions such as AI-augmented cameras, connected and autonomous vehicles and the segmentation and analysis of client and prospect data.

With Altij's corporate team, Nicholas regularly assists international clients on M&A operations (due diligence, preparation of deal documentation, legal assistance pre and post-closing) as well as organic growth through setting up subsidiaries in France.

Before joining Altij, Nicholas worked in the Paris office of a leading US law firm and in London for a leading UK firm. Nicholas regularly lectures and publishes articles on questions of personal data protection and teaches at Dauphine University in Paris and Tunis and the Toulouse Bar School (EDASOP).

ABOUT ALTIJ

Founded in 2002, Altij is today one of the leading law firms in the South of France. Our lawyers work with clients from start-ups to multinational groups across multiple sectors, providing strategic advice on French law.

Headquartered in Toulouse, European capital of aeronautics and space and one of the continent's leading technology and research hubs, Altij is perfectly placed to help international clients with their investment and compliance questions in France.

We are delighted to work in partnership with Invest in Toulouse to provide legal support to international investors across our different practice areas (corporate law and company creation, IT/IP/Data, employment, real estate, etc.) Our strength lies in our shared values of innovation and dedication to client service, with our teams of specialists working closely together to offer businesses a joined-up vision for their French operations.

For additional information please go to www.altij.fr/en

CENTRE OF EXCELLENCE FOR THE HEALTH TECH OF TOMORROW

KEY FIGURES

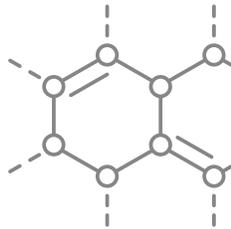
- Health is a leading sector for employment in the Occitanie region representing 18% of all employees (140 000 employees + 20000 self-employed)
- 9,000 public and private researchers in the health sector
- 20,000 jobs in the private sector including 10 000 in R&D: more than 200 SMEs and startups work daily with key actors such as Sanofi, Evotec or Pierre Fabre
- Around 190,000 people work every day in the medical and health sector R&D in the Occitanie region
- 4,8 % of GDP is dedicated to R&D (1st region, 4th for medical R&D)
- A focus on Toulouse: 15,000 students, 2,200 researchers in the health sector, 8 hospitals, 9 clinics, 110 companies gathering 3,500 employees and one major site: the Oncopole.

TOULOUSE GOLDEN AGE FOR HEALTH DIGITIZATION

A merging of healthcare and technology

- #1 ranked hospital in France in 2022
- Capital of AI
- Capital of IoT
- Capital of data analytics

Toulouse helps you develop all technological solutions scientifically validated to answer major public health challenges.



Toulouse University Hospital (CHU)

- 3,170 beds
- 850,000 patients
- 280,000 hospital stays per year
- 15,800 employees (full-time)
- Spending 1.2 billion € per year

2 major healthcare actors

Pasteur Clinic

- 1st French private clinic for cardiology
- 2 to 3 M€ per year to support medical imaging solutions, AR tools, eHealth platforms and cloud solutions
- Dominique Pon (CEO) leads the digital chapter of the “Ma Santé 2022” national healthcare program

CENTRE OF EXCELLENCE FOR THE HEALTH TECH OF TOMORROW

In Toulouse, public and private initiatives are multiplying in diverse fields such as the fight against cancer, diabetes and obesity, with strong synergies, notably between aeronautics and medicine.

Dermatology, cosmetics, gerontology, heart surgery, anti-bioresistance, microbiota: all these fields of excellence contribute to establish Toulouse as a European and global centre for health research.

The ONCOPOLE is today the largest cancer research centre in Europe, located next to the Toulouse Space Centre. As a member of the European Organisation of Cancer Centres (OECI), it brings together experts in a continuum ranging from fundamental to clinical research.



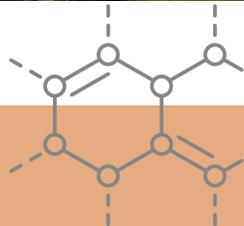
IN 2022

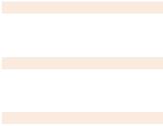
THE 6TH WORLD TB VACCINE FORUM: TB VACCINES - 22ND TO 24TH FEBRUARY 2022 (DIGITAL)

Placed under the High Patronage of Mr Emmanuel MACRON President of the French Republic and Minister of Solidarity and Health Olivier Véran, this forum is the world's largest gathering of actors in the research, development and implementation of new vaccines to prevent and/or treat tuberculosis. The bid was led by: the Institute of Pharmacology and Structural Biology, the CNRS and supported by the Toulouse Midi-Pyrénées Federal University, and in partnership with the Convention Bureau.

Toulouse was chosen as the host city because of the scientific excellence present in the area and this choice was further explained by Isabelle Saves, Head of International Cooperation and Olivier Neyrolles, Director of the IPBS-Toulouse: "The organisation of the world forum in Toulouse presents several opportunities, notably in terms of the visibility of Toulouse's scientific excellence, particularly in the field of health. And so we embarked on a very competitive and demanding selection process at the end of which the Pink City was chosen as the host city for this 6th World Forum."

However, due to the current health context, the congress has switched to 100% digital and is postponing its physical presence in Toulouse for a future edition.





CENTRE OF EXCELLENCE FOR ARTIFICIAL INTELLIGENCE AND AUTONOMOUS TRANSPORTATION

A PLACE OF EXPERIMENTATION

Toulouse has unique innovation campuses and multiple business areas dedicated to experimentation and innovation:

FRANCAZAL FOR INTELLIGENT AND CONNECTED SYSTEMS

The Francazal airport is the new hub for innovative autonomous transportation in Toulouse. It is a 55 hectares urban reconversion project dedicated to experimentation of autonomous vehicles and drones. The site currently accommodates companies employing 300 people: ATR (maintenance and prototyping programs) / Tarmac Aerosave (leading European aircraft storage company) / Airborne Concept (professional drone solutions) / Acia Aero Parts (aeronautics) / EasyMile / Hyperloop Transportation Technologies / EVA (Electric Visionary Aircrafts).

AUTOCAMPUS LAND OF EXPERIMENTATION

autOCampus is a hub of collaboration between research, industry, transport operators, training and users around the connected and autonomous vehicles. The private land of 70 hectares, not constrained by legal obligations related to open roads, simplifies setting up experimentation projects.

TOULOUSE AEROSPACE NEW CENTRE FOR AEROSPACE EXCELLENCE

Toulouse Aerospace is a new district of 56 hectares dedicated to innovation in aerospace and embedded systems in a University and research ecosystem. Since March 2018, B612 innovation campus hosts IRT Research Institute, Aerospace Valley and a startup incubator 24 500 sqm dedicated to R & D and technological development in aeronautics, space and embedded systems:

- IRT research institute
- Aerospace Valley cluster
- 9 600 sqm offices for innovative companies
- 1 600 sqm public incubator



A CENTRE OF EXCELLENCE FOR ARTIFICIAL INTELLIGENCE AND AUTONOMOUS TRANSPORTATION

Toulouse is among the European leaders in Research on Intelligent Transportation System Technologies and a pilot region in the government's "France artificial intelligence initiative" that was launched in January 2017 to help set the broad guidelines of a favorable legislative and regulatory framework.

The attractiveness of the territory is based on the combination of a strong academic background with an industrial network organised in clusters allowing the success of dedicated experiments and cross fertilization programmes.

This ecosystem stimulates sectors such as aerospace, automotive and intelligent rail transport systems.

The Francazal airbase has partly been turned by Toulouse Métropole as a strategic hub for future mobility and is now an Intermodality Test Centre which will be used for the development and testing of ground and air future mobility systems. Innovative and cutting-edge companies such as Hyperloop TT, Easymile or Ascendance are already gathered on site.



COMING SOON

TOULOUSE WILL HOST THE INTELLIGENT TRANSPORT SYSTEMS EUROPE (ITS) CONFERENCE - 30TH MAY AND 1ST JUNE 2022

ITS European Congress is the benchmark event for the entire ITS (Intelligent Transport Systems) community to keep track of the industry's constant evolution.

The Congress offers both learning and networking opportunities with all the most active players in the sector, through demonstrations that incorporate all the latest developments in intelligent mobility and the digitalisation of transport.



TOULOUSE CENTRE OF EXCELLENCE FOR AERONAUTICS AND SPACE

KEY FIGURES

- Cradle of aeronautics since 1918 and the launch of the Aeropostale airmail company In Toulouse
- 25% of French R&D in aeronautics and space are gathered in Toulouse
- 80,000 employees in the aerospace sector
- Airbus is #1 french industrial site with 650ha & 40K employees

TOULOUSE WORLD CAPITAL OF AERONAUTICS



As the historic site of the French aeronautics and space industry and with Airbus Group's Headquarters, Toulouse is involved in leading projects.

All the key-steps of the aircraft industry are in Toulouse: from the design, the certification, the manufacturing, the assembly, up to flight tests.

Toulouse, an ecosystem turned towards the technologies of tomorrow:

- Energy-efficient aircraft: more electric, new materials, green propulsion, hydrogen
- Intelligent aircraft: more connected, SPO
- Smart manufacturing

Two main sites are dedicated to aeronautics in Toulouse: Saint Martin du Touch: 1st French industrial plant with 650ha and 40.000 employees, and Toulouse Aerospace, a new research and development campus in aeronautics, space and embedded systems of 56ha.

The Toulouse aerospace sector can directly benefit from the talents trained at some of the world leading schools in higher education in the aerospace engineering field, as well as research and laboratories:

ONERA the national aerospace laboratory.

the IRT Saint-Exupéry research institute.

laboratories such as CIRIMAT; Laplace; CRITT.

ENAC: the French school for pilots and air trac control.

ISAE - SUPAERO: world leader in aerospace engineering.

ENSEEIH: electronics, mechanics and telecom engineering.

INP-ENSIACET: chemical, material, and industrial engineering.

TOULOUSE CENTRE OF EXCELLENCE FOR AERONAUTICS AND SPACE

TOULOUSE SPACE LEADER

Toulouse boasts a high concentration of space industry companies with all main players located within a 20 km block and is therefore a pioneer city in the space sector. Toulouse has decades of experience with:

- Inception of the CNES Centre National des Etudes Spatiales (the formal French Space Agency) since 1968. The CNES is involved in major space missions : Philae (Rosetta), Curiosity (Mars), Perseverance (Mars), Thomas Pesquet (ISS)
- Telecommunication sector with ADS and Thalès Alénia Space taking part to Eutelsat.
- Airbus DS Geo (previously named Spot Image) is a leader in Earth Observation since 1982
- The weather forecast skill driven by METEO France that gathers : climate change analysis, research, and the National School in weather-forecasting.
- The oceanography analysis is led by MERCATOR OCEAN and available to every partner through its cloud named Wekeo.
- Geolocation is also an expertise of Toulouse with Galiléo, EGNOS, ESSP, GUIDE-GNSS



With the experience acquired since the creation of CNES, the city is now taking the lead in the NewSpace sector, with many promising projects.

The global cluster Aerospace Valley based in Toulouse represents the largest European labor pool in aeronautics and space.

The team is dedicated to fostering innovation:

the Aerospace Valley has funded 475 R&D projects which represent 1.2B€

the cluster collaborates on European projects : CleanSky, H2020, Horizon Europe
with 2 weekly events on specific topics

Aerospace Valley has created the cluster NewSpace Factory to gather local industrial talents.

The team is also leading the ESA BIC (Business Acceleration Center) and the Hackaton Act In Space.

TOULOUSE CONGRESS CALENDAR 2022

PFUE – SOMMET DE L'AVIATION 02/03-04/2022

PFUE – FORUM SPATIAL COLLOQUE COPERNICUS HORIZON 2035 02/16-17/2022

PFUE – SOMMET DES CHEFS D'ETAT UE ET ESA, RÉUNION INFORMELLE DES MINISTRES EUROPÉENS CHARGÉS DE L'ESPACE 16/02/2022

UE – 6TH GLOBAL FORUM ON TUBERCULOSE VACCINES 02/22-25/2022

PFUE – RÉUNION INFORMELLE DU GROUPE DE TRAVAIL À HAUT NIVEAU SUR LES QUESTIONS FISCALES 03/03-04/2022

PFUE – JOURNÉE DES PERSONNALITÉS EN MARGE DE L'EXERCICE D'ENTRAÎNEMENT AUX OPÉRATIONS SPATIALES ASTERX 2022 03/07-11/2022

WORKSHOP TRISHNA DAYS 03/22-24/2022

LES ENTRETIENS DE TOULOUSE RENCONTRES AÉROSPATIALES 04/12-13/2022

CJD – CONGRÈS NATIONAL DES JEUNES DIRIGEANTS DE FRANCE 05/12-13/2022

ADSTCS 26TH – AERODYNAMIC DECELERATION SYSTEMS TECHNOLOGY CONFERENCE AND SEMINAR 05/16-19/2022

COLLOQUE INTERDISCIPLINAIRE BECO 05/18-20/2022

ITS – EUROPE INTELLIGENT TRANSPORT SYSTEMS 06/30-01/2022

43ÈME MYCOTOXIN WORKSHOP 06/30-01/2022

EEDAL – CONFÉRENCE INTERNATIONALE SUR L'EFFICACITÉ ÉNERGÉTIQUE DES APPAREILS DOMESTIQUES ET DE L'ÉCLAIRAGE 06/01-02/2022

ICCAS 2020 – CONFERENCE ON COGNITIVE AIRCRAFT SYSTEMS 06/01-02/2022

RENCONTRES UNIVERSITÉS FRANCO-ALLEMANDE 06/02-03/2022

34ÈME CONGRÈS DE LA SOCIÉTÉ FRANÇAISE DES CHIRURGIENS ESTHÉTIQUES PLASTICIENS 06/02-04/2022

ESCAPE – EUROPEAN SYMPOSIUM ON COMPUTER AIDED PROCESS ENGINEERING 06/12-15/2022

PFUE – RÉUNION INFORMELLE DES ATTACHÉS ESPACE 06/15-17/2022

JOUM – JOURNÉES D'ONCO-UROLOGIE MÉDICALE 2022 06/17-18/2022

PFUE – RÉUNION DES DIRECTEURS EN CHARGE DU DÉVELOPPEMENT RURAL 06/20-22/2022

PFUE – RÉUNION INFORMELLE DES ATTACHÉS TÉLÉCOMS 06/20/2022

PFUE – ASSEMBLÉE NUMÉRIQUE 06/21-22/2022

COLLOQUE RENCONTRE DES ÉTUDES AFRICAINES EN FRANCE 07/28-01/2022

NUCLEAR ARCHITECTURE & FUNCTION 07/28-01/2022

EABS – CONGRÈS ANNUEL DE L'ASSOCIATION EUROPÉENNE DES ETUDES BIBLIQUES 07/04-07/2022

ETHYLÈNE 2022 07/04-08/2022

ISPB 2022 – INTERNATIONAL SYMPOSIUM ON PLASMID BIOLOGY 09/18-23/2022

CONGRÈS NATIONAL DE MÉDECINE VASCULAIRE 10/28-01/2022

2ÈME RENCONTRES DE LA SFPJ – SOCIÉTÉ FRANÇAISE POUR LA PHILOSOPHIE ET LA THÉORIE JURIDIQUE ET POLITIQUE 09/29-30/2022

COLLOQUE CRÉATION RECHERCHE EN OLFACATION 10/05-07/2022

SWEP – SOUTH WESTERN EUROPEAN PLATFORM 10/27-30/2022

JFN – JOURNÉES FRANCOPHONES DE NUTRITION 11/16-18/2022

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