

















Saint-Denis Basilicum and Maison de la Légion d'Honneur © Plaine Commune, Direction du Développement Economique, SEPE, Som VOSAVANH-DEPLAGNE - Plain of Montesson © CSAGBS-EDesaux - La Défense Business district © 11h45 for Defacto - Campus © Ecole Polytechnique Paris/Saclay. J. Barande - © Ville d'Enghien-les-Bains - INSEAD Fontainebleau © Yann Piriou - Charenton-le-Pont – Ivry-sur-Seine © ParisEstMarne&Bois - Bassin de La Villette, Paris Plages © CRT Ile-de-France - Tripelon-Jarry

Welcome to Paris Region



Europe's business & innovation powerhouse

Paris Region Facts and Figures 2020 lays out a panorama of the region's economic dynamism and social life, positioning it among the leading regions in Europe and worldwide.

With its fundamental key indicators, the brochure "Paris Region Facts and Figures 2020" is a tool for decision and action for companies and economic stakeholders. It is useful to economic and political leaders of the region and to all those who want to have a global vision of this dynamic regional economy.

Paris Region Facts and Figures 2020 is a collaborative publication produced by Choose Paris Region, L'Institut Paris Region and the Paris Île-de-France Regional Chamber of Commerce and Industry.



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Tuileries Gardens – Eiffel Tower © CRT IDF - Van Biesen
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	Real Estate Transport and Mobility Logistics Meetings and Exhibitions

Paris Region, a dynamic and fast-growing global region

Standing at the crossroads of European and worldwide trade, the Paris Region is Europe's #1 economic region, vibrant, innovative and sustainable.

A dynamic and fast-growing region

The Paris Region is a truly global region which accounts for 23.3% of France's workforce, 31% of national GDP and 40.5% of the country's researchers. 53% of residents are under the age of 40. This young and steadily growing population is not only attracted by the region's economic opportunities but also by the quality of life offered.

A business and innovation powerhouse

The highest GDP in the European Union (EU28) in billions of euros. A vibrant exchange between Europe's highest concentration of Fortune 500 corporations, corporate headquarters, SMEs, trailblazing startups, world-class competitiveness clusters. #1 worldwide destination for international meetings. The leader in Europe for R&D talent and spending.

Highly-diversified sectors of excellence

Paris Region is renowned for its highly diversified economic landscape and sectors of excellence, including biotechnology, nanotechnology, telecommunications, 3D animation, the aerospace and automotive industries...

The Paris Region's diversified economy is buzzing with topranked high-tech clusters and research centers.

This unique landscape generates exciting opportunities for cross-sector collaborations.

A massive consumer marketplace

Access to **513 million** European consumers **12.2 million** inhabitants, **50.1 million** tourists, **9.4 million** visitors in the Region's main conference and exhibition centers.

A qualified, cosmopolitan talent pool

Large, well-educated, international workforce: **6.4 million** jobs, **36%** of all French executives. Europe's largest concentration of higher education students: **704,500** students (**26.3%** of students in France),

World-class engineers, researchers, Fields Medals, Abel and Nobel prizes,...

Internationally recognized technical and scientific skills (top business, engineering and specialized higher education institutions, engineers, researchers...).

Europe's largest scope of real estate solutions

Attractive, diversified and very competitive real estate, with new office districts and business parks, as well as the opening of coworking spaces, "startup factories"...

World-class infrastructure

3 international airports, high-speed rail, an ever-expanding urban subway system thanks to the Grand Paris Express project, the largest urban renewal project in Europe, new modes of mobility and an excellent broadband communication network.

An outstanding lifestyle

There's a reason why the Paris Region is the #1 destination on the planet: with 50.1 million visitors each year, the area is synonymous with "art de vivre", culture, gastronomy and history. The Region is also committed to improving the environment, preserving biodiversity and reducing carbon emissions.

Urban development & big events

The Grand Paris Express

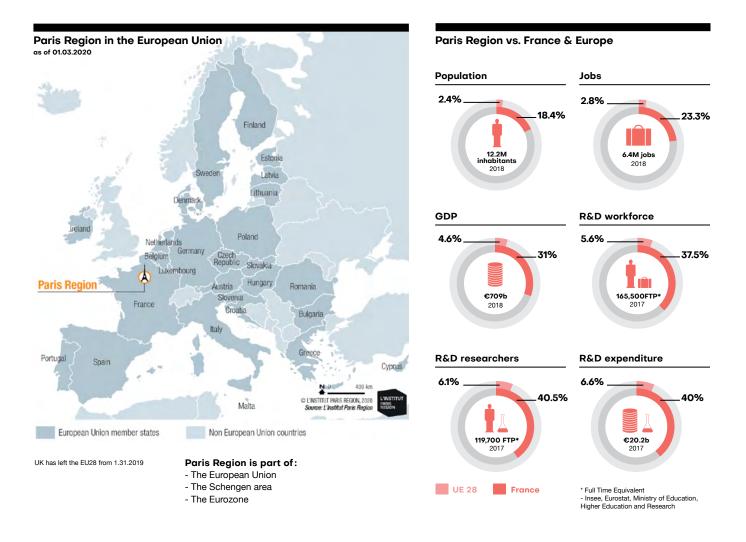
With its **200 km** of new tracks and **68** new transit stations, the network of the regional super-subway, the Grand Paris Express project, will be doubling its size by 2030, changing the face of the Region.

Paris 2024

Paris will be hosting the 2024 Olympic and Paralympic Games, which will generate major infrastructure and construction projects. 5

A world leading economic and innovative region

With a GDP of €709 billion and a population of 12.2 million, the Paris Region represents 31% of France's GDP and 18.4% of its population, while it respectively represents 4.6% and 2.4% of the European Union's GDP and population.



An international region

1.7 million foreigners live in the region13.9% of the population 2016

119,400 foreign students in higher education, including 80,500 in Paris Region's public universities 2018-19 8,240 foreign PhD students 2018-19

5,800 foreign researchers

22.2 million foreign visitors

15,100 foreign sites 620,000 jobs, 1 out of 6 jobs in Paris Region is in a foreign company (16.7%) 2017, data 2013

409 foreign compagnies 6,303 jobs created 2018

Paris Region in numbers



Paris Region's position in international rankings

The Paris Region is a globally competitive region. It is one of the most attractive regions in the world according to different rankings on attractiveness, companies, foreign direct investments, talents, real estate, cost and quality of life... Recent international benchmarking studies have put the region within the top metropolises in the world in terms of Human Capital, Economic activity, Attractiveness, Cultural experience, Information exchange, Research and Development, Tourism...

Global Attractiveness

Global Cities Index 2019 on economic performances

#1 New York #2 London #3 Paris #4 Tokyo #5 Hong-Kong A.T. Kearney Global Cities Outlook 2019 on the potential of a city to attract and retain global capital, people, and ideas in coming years

#1 London #2 Singapore #3 San Francisco #4 Amsterdam <mark>#5 Paris</mark> A.T. Keamey

Foreign direct investments

As of 2018, the Paris Region is the second international destination for international investments following London, and first for Research, Design and Engineering investments, followed by Singapore.

fDi European Regions of the Future 2020/21

#

Paris Region European region of the future

Global Cities Investment monitor 2019

International investors' perceptions of future attractiveness

#1 New York #2 London #3 Paris

Paris Region, #1 world destination for investments in R&D 2nd most attractive location to set up a business KPMG - Paris lle-de-France Capitale

Economique, Choose Paris Region



Hoops Factory, Basket Hall in aubervilliiers © J.-M. Sicot, L'Institut Paris Region

Dynamic Cities 2019

2019 Top 5 dynamic cities

#1 London #2 Paris #3 Cambridge #4 Berlin #5 Amsterdam Savills

Cost & Quality of Life

Cost of living Survey 2019

Paris is less expensive in Europe than Zurich, Bern, Geneva, Copenhagen, London, Moscow, Dublin, Milan. Mercer 2019

Cost of living Expatistan

Paris is cheaper than London 12% cheaper for housing 43% cheaper for transportation 60% cheaper for personal care 10% for entertainment Expatistan 1/20

Quality of living Survey 2019

The quality of life in Paris is very appreciated, and ranked ahead of that of many global cities such as London, Luxembourg, Madrid, Rome... Mercer 2019

Real Estate

Emerging Trends in Real Estate, Europe 2020

Paris is ranked #1 for its overall real estate prospects in 2020.

The Grand Paris project, Europe's largest transport scheme, is widely lauded as a game-changer for the French capital, setting it apart from the competition.

Global Property Handbook 2020

Paris became the preferred city for international clients to invest in real estate.

#1 Paris

#2 New York #3 Tokyo #4 Los Angeles #5 Hong Kong Barne

Emerging Trends in Real Estate, Europe 2020 2019 Paris 1 Lisbon 2 Berlin Berlin 3 Frankfurt Dublin Madrid 4 London 5 Madrid Frankfurt PWC. ULI Urban Life Institute

Talents

Cities of Influence, Where to find the best talent 2018

#1 London #2 Paris #3 Madrid Colliers International, 2018

Tourism and meetings

2019 Mastercard's Global **Destination Cities Index**

Total of international overnight visitors by city

#1 Bangkok 22.78 M #2 Paris 19.10 M #3 London 19.09 M #4 Dubai 15.93 M #5 Singapore 14.67 M

Mastercard

HEC Paris #1 Best executive MBA

Education rankings

Financial Times

2019-20

program Best European business school Financial Times, 2019

2019 ICCA meetings organized in the world

Paris, #1 world destination for congresses #2 Vienna #3 Barcelona #4 Berlin #5 Madrid ICCA, International Congress and Convention Association

R&D, Tech and Innovation

Global Innovation Index 2019

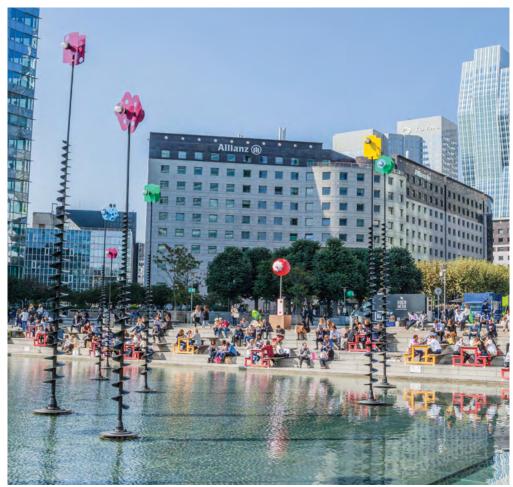
Paris, European #1 and #9 largest science and technology clusters in the world OMPI, 2019

Startup Genome 2019

Paris Region innovation: 9th on the top 15 startup ecosystems in the world Startup Genome, 7/19

Innovation Cities Top 100 Index 2019

Paris, #2 European and #6 best city in the world for innovation 2thinknow



La Défense Business district © 11h45 pour Defacto

A young, cosmopolitan and talented population

The Paris Region is the most populated region in France and in Europe and one of the most populated regions in the world. The people living in the Region are largely diverse and more foreigners live in the region than they do in the rest of France. The Paris Region's population remains one of the most fertile regions of metropolitan France and also the youngest.

Europe's most populous region



2.4% of the European Union's population

Europe's most populous region ahead of Lombardy, Greater London, Andalusia, Auvergne-Rhône-Alpes and Catalonia.





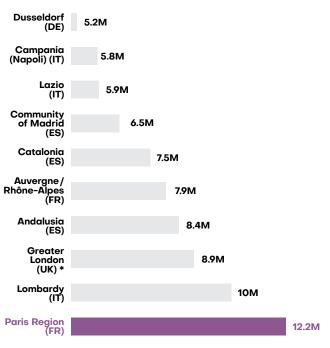
Over 100,000 inhabitants in 5 towns in Paris Region:

Paris Boulogne-Billancourt Saint-Denis Argenteuil Montreuil INSEE, Eurostat 1/20, data 2018



© Ecole Polytechnique Paris/Saclay. J. Barande

Paris Region, EU28's most populous region



* Greater London= Inner and Outer London

Eurostat 2018 (data 2017), NUTS 2

A young, dynamic population

Paris Region contributes to 24% of births and 83% of the natural surplus of metropolitan France, a weight never reached before. Between 2012 and 2017, the region earned an average of 55,000 inhabitants per year.

25% of Paris Region's population is under 19 53% under 40				
Age	Paris F	Region	Frar	nce
	Total	% Total / Paris Region	Total	% Total / France
0-19	3,140,965	25.6	16,084,743	24
20-39	3,409,765	27.8	15,759,165	23.5
40-59	3,210,447	26.1	17,369,555	26
60-74	1,658,207	13.5	11 ,476,704	17
Over 75	858,826	7	6,373,536	9.5
Total	12,272,210	100%	67,063,703	100%

Insee, 2020, data 1/1/20

Africa

A cosmopolitan population

Paris Region is a place where people from all over the world live, study, work or visit.

46.96% come from Africa: 792,425 31.32% come from Europe: 528,481 16.82% come from Asia: 282,898 4.79% come from the Americas: 80,869 0.11% come from Oceania: 1,869

792,425	
Algeria	203,559
Morocco	146,230
Tunisia	75,398
Mali	65,542
Other nationalities from Africa	301,698

Europe 528,481	

Portugal	231,367
Italy	49,417
Romania	47,185
Spain	37,885
Poland	26,847
United-Kingdom	18,598
Germany	16,983
Other nationalities from Europe	54,890
Other nationalities from EU	45,309

174,439 births 75,571 deaths France: 85.4

14.2‰ birth rate France: 11.3‰

Women's life expectancy 85.9 years France 83.6

Men's life expectancy 81.1 years France: 79.7

Paris fertility rate:

1.96 children per woman Brussels: 1.82

London: 1.71 Upper Bavaria: 1.54 Amsterdam: 1.52 Berlin: 1.48 Catalonia: 1.39 Lombardy: 1.39 INSEE 1/20, data 2018 and 2019, Eurostat 1/20, data 2017, panel of regions

Top 5 of the EU28 regions counting young people between 25 and 29 years old			
Paris Region (FR)	888,930		
Greater London (UK)	803,799		
Lombardy (IT)	506,611		
Andalusia (ES)	489,812		
Catalonia (ES)	402,076		

Eurostat 15/10/19, data 2018

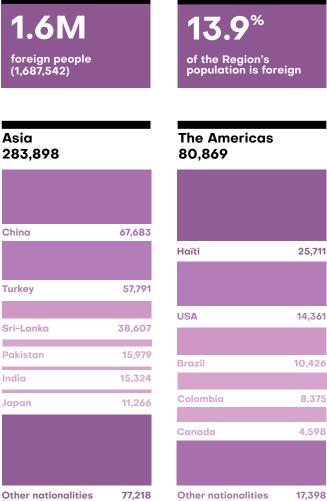
Asia

China

Turkey

India

Japan



Other nationalities from Asia

Other nationalities 17,398 from the Americas

Europe's leading economic region

Paris Region is an economic powerhouse, with the EU's highest GDP, most Fortune 500 company headquarters in Europe, a buzzing startup scene and a thriving research community. The region's diverse economic landscape encompasses all sectors. Companies are choosing the Paris Region to grow their business.



The highest GDP in Europe, equivalent to that of the Netherlands, and higher than that of Sweden, Poland, Belgium or Norway.

Belgium or Norway. Th Access to over 513 million to

European consumers Europe's highest concentration of Fortune 500 corporations



The Paris Region's economic dynamism benefits from its position at the heart of the world's economy.

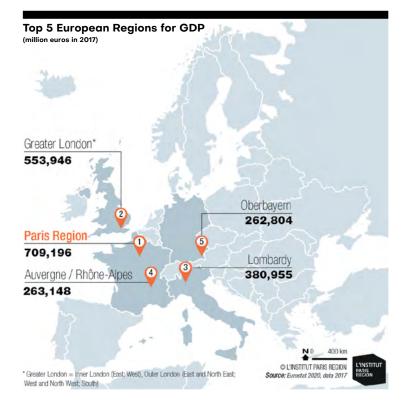
The Paris Region is home to a truly diversified economy with industry leaders, innovative start-ups and all key stakeholders in between.

GDP per job €110,549

GDP per capita €58,300 INSEE, Eurostat, 2020, data 2017



From the Arch of La Défense business district © Carlos Ayesta



4.6[%] of EU28 GDP

of France's GDP

31%

A highly diversified economic landscape Key sectors

Paris Region is home to a truly diversified economy with industry leaders, innovative start-ups and all key stakeholders in between. It is renowned for its highly diversified economic landscape and sectors of excellence, including high-value-added service industries and high-tech manufacturing, ie. artificial intelligence, cleantech, deeptech, fintech, IT services, biotechnology, e-health, cultural industries, animation, as well as the aerospace and automotive industries, smart industry...



Business Services

Accenture, Cap Gemini, EY, Gide Loyrette Nouel, KPMG...



Aerospace & Defense

Airbus Group, Dassault Aviation, Safran, Thales Group, Arianespace, European Space Agency, Alcatel-Lucent, Zodiac...



Commerce / Retail

Amazon, Carrefour, Cora, FNAC, Galeries Lafayette, Groupe Casino, H&M, Ikea, Marionnaud, Metro, Printemps, Uniqlo, Zara...



Food Industry Danone, Finatis, Kraft Foods, Lactalis, Nestlé, Pernod Ricard...



Automotive, Logistics and Mobility

Renault, PSA Peugeot Citroën, Bosch, Continental, Faurecia, Valeo, Air France-KLM Group, DHL, FedEx, Geodis, Paris Aéroport, RATP, SNCF, Systra, Transilien, Transdev...



Creative industries, Film, TV

Europacorp, Gaumont, MK2, Netflix, Paramount, Pathé, Universal, Warner Bros, UGC... Buf compagnie, Gameloft, Mac Guff, Mikros Image, Mimesis Republic, Neko-Entertainment, Ubisoft...



Healthcare & Life Sciences AstraZeneca, Bristol-Myers Squibb, GlaxoSmithKline, Guerbet, Lilly, Pfizer, Roche, Sanofi-Aventis, Novartis...



Fashion, Design, Luxury Goods

Cartier, Chanel, Hermes, Christian Louboutin, Kering (Gucci, Yves Saint-Laurent), LVMH (Louis Vuitton, Christian Dior, Guerlain...), L'Oréal...



IT

Apple, Atos, Dassault Systèmes, Facebook, Free, Fujitsu, Google, Horiba, Huawei, IBM, Microsoft, Motorola, Nokia France, Oracle, Orange, Philips, Safran Electronics and Defense, SAP, SFR Group, Siemens, Sony, Thales, Vivendi, ZTE...



Tourism, Hotels, Catering

Accor, Club Med, Elior Groupe, Louvre Hotels, Lucien Barrière Group, Marriott, Pierre et Vacances & Center Parcs Group, Sodexo ...



Cleantech, Energy, Smart City

Air Liquide, Areva, EDF, ENGIE, Schneider Electric, Suez, Total, Veolia... Bouygues, Eiffage, Vinci...



Financial Services, Insurance

Bank of America, BNP Paribas, BPCE Group, CityBank, CM-CIC Group, Crédit Agricole, EBA European Bank Authority, Euronext Paris, JP Morgan, HSBC, La Banque Postale, Société Générale, Axa, Allianz, CNP Assurance, Generali...



M.I.C.E.* Comexposium, Reed Midem, Viparis... Disneyland® Paris... 'Meetings, Incentives, Conventions,' Exhibitions

A business powerhouse

The primary strength of the Paris Region's economy is the concentration of jobs, corporate headquarters, SMEs/SMIs and business start-ups. All of France's very large businesses (> 1,500 employees each) have a site in the region.



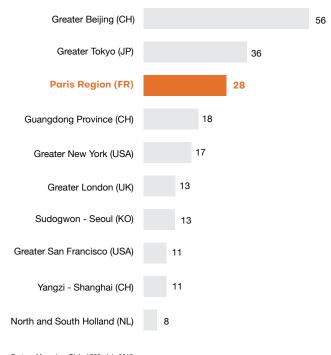
31 of the top Fortune Global 500 corporations are headquartered in France, 28 in Paris Region

Top 10 Corporate Headquarters in Paris Region - Fortune Global 500				
	Total workforce			
Total	184,106	104,460		
AXA	125,578	104,085		
Carrefour	91,955	363,862		
Crédit Agricole	88,325	73,346		
BNP Paribas	83,974	197,162		
Electricité de France	81,403	165,790		
ENGIE	74,144	160,301		
PSA Peugeot Citroën	87,364	216,539		
Renault	67,764	183,002		
Société Générale	58,390	140,250		

Paris Region, Europe's 5th leading region for labor productivity Vienna (AT) 109,80 Stockholm (SE) 121,93 Greater London (UK) 122,94 Hamburg (DE) 125,03 Hovedstade 131,87 (Copenhagen) (DK) **Paris Region** 132,46 (FR) Eastern 134,74 and Midland (IE) Brussels Capital Region (BE) 170,20 Southern (IE) 171,85 Luxembourg (LU) 198,63

Apparent Labor Productivity - Source: Eurostat GDP in million euros 2017 (NUTS 2) divided by total number employed 15 years old and over (2018), estimates.Greater London= Inner + Outer London

Paris Region, Europe's highest concentration of Fortune 500 Global corporate headquarters



Fortune Magazine, Global 500, July 2019. Ranking by metropolitan regions. Estimates Choose Paris Region

Fortune Magazine, Global 500, July 2019

Paris Region, at the heart of World Trade (2018)



26.6% of France's imports

Exports €97.4b

20.2% of France's exports

Paris Region's main trading partners

Europe Exports: €56.4b, 57.9% Imports: €88.7b, 59.7%

Asia and Oceania Exports: €14.5b, 14.9% Imports: €36.4b, 24.5%

The Americas Exports: €16.4b, 16.8% Imports: €15.4b, 10.4% The top 3 most exported products are indicative of the specialization of Paris Region industries (aerospace and defense, automotive, pharmaceutical industry).

Main imported products

Automotive manufacturing products: €18.9b, 12.7%

Hydrocarbons: €9.9b, 6.7%

Telephones and communication equipment: €8.8b, 5.9%

Main exported products

Space and aeronautics manufacturing products: €13.5b, 13.8%

Automotive manufacturing products: €9.5b, 9.7%

Pharmaceutical products: €7.4b, 7.6%





Ariane Group © Département des Yvelines

Paris Region's leading business partners (2018)					
Top 10 suppliers			Top 10 customers		
Imports		Exports			
Country	Value (€ billion)	%	Country Value (€ billion) %		
China	20.7	14.0	United States	12.8	13.2
Germany	17.3	11.7	Germany	12.4	12.7
Belgium	13.6	9.1	Spain	6.3	6.5
United States	12.7	8.5	United Kingdom	6.2	6.3
Italy	10.6	7.1	Italy	5.9	6.1
Spain	8.6	5.8	Belgium	5.8	5.9
Netherlands	6.4	4.3	Switzerland	5.0	5.1
United Kingdom	6.3	4.2	China	3.6	3.7
Switzerland	5.3	3.6	Hong-Kong	2.5	2.6
Japan	3.6	2.4	Netherlands	2.2	2.3
Global total Paris Region *	148.5		Global total Paris Region *	94.4	

The main supplier countries are the nearby countries as well as the major powers world's economies (China, USA and Japan).

For 10 years, the United States and Germany have been Paris Region's main export partners.

French Customs, 2018, * including other countries

16

An attractive region for foreign companies

The Paris Region is the top French region in terms of hosting foreign companies and it accounts for a third of all new business creations in France.

Europe's #2 Region for major foreign companies

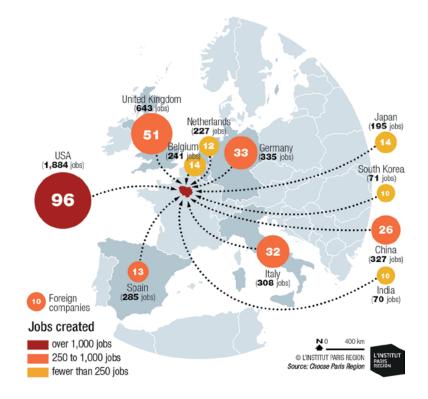
15,100

sites depending on a foreign company

620,000

jobs, 1 out of 6 jobs in Paris Region (16.7%)

Foreign direct investments in Paris Region: Main countries by business origin and jobs created in 2018



90 countries

Main countries

USA 165,000 jobs

Germany and UK 80,000 jobs each

Main sectors

Wholesale 132,000 jobs

Industry 82,000 jobs

Scientific and technical activities 75,000 jobs

Information and communication activities 71,000 jobs Insee, Esane, Clap and Lifi 2017, (data 2013)

2018 FDI arrivals

409 foreign companies from over 50 countries creating 6,303 jobs, including:

198 from European groups (48%) 3,089 jobs

112 from American groups (27%) 2,070 jobs

73 from Asian and Oceanian groups (17.6%) 812 jobs

26 from other countries (Africa, Middle East) (6.3%) 232 jobs Choose Paris Region

Top Major Paris Region compagnies dependent on foreign groups (based on salaried workforce)

Country	Company	Salaried workforce
Netherlands	Ranstad	92,768
USA	Euro Disney Associes	15,383
Sweden	Securitas France SARL	13,801
United Kingdom	Compass Group France	13,336
Netherlands	Meubles Ikea France	10,064
Netherlands	Select TT (Groupe Ranstad)	10,976
Netherlands	Conforama France	9,375
Germany	Metro France	8,711
Sweden	H&M Hennes & Mauritz	6,886
Qatar	GFI Informatique	6,265
USA	Cie IBM France	6,250
Spain	Zara	6,104
USA	Otis	6,049

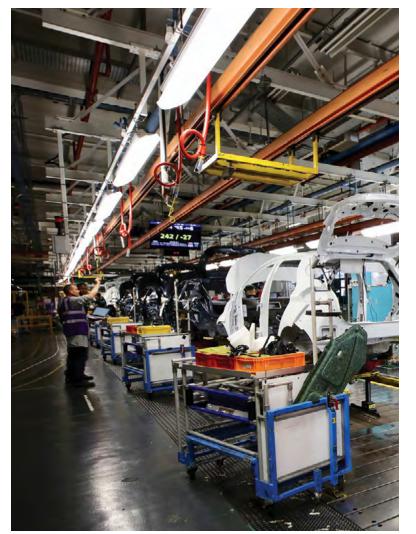
Diane 1/20

Very competitive set-up costs among global cities

Overall results – Average of services and manufacturing sectors*					
	Paris	Tokyo	London	New York	
Initial Investment	13,679	20,910	15,689	15,271	
Rank, total investment	1	4	3	2	
Total Labor	7,595	7,267	8,029	11,002	
Rank, total labor	2	1	3	4	
Total transportation	810	465	1,010	854	
Rank, transportation	2	1	4	3	
Total Utilities	280	376	367	321	
Rank, electricity	1	4	3	2	
Total operating costs	9,326	8,941	10,520	12,616	
Rank, operating costs	2	1	3	4	
Total costs	21,849	22,302	22,741	24,956	
Overall rank	1	2	3	4	

*10-Year Average Annual Total Location Sensitive Costs (in thousand US\$)

Competitive Alternatives, KPMG 2016, Panel of regions and criteria



Very competitive living costs

Paris more affordable than London and cheaper than 11 European cities

Housing in Paris is globally 12% cheaper than in London (in €)				
	Paris	London		
Monthly rent for 85 m ² (900 Sqft) furnished accommodation in expensive area	2,630	2,918		
Monthly rent for a 45 m ² (480 Sqft) furnished studio in normal area	1,205	1,401		
Uilities 1 month (heating, electricity, gas) for 1 person in 45 m² (480 Sqft) studio	88	111		
Internet 8 Mbps (1 month)	20	25		

Transportation in Paris is globally 43% cheaper than in London (in €)					
Paris London					
Monthly ticket public transport	75	167			
Taxi trip on a business day, basic 12 3: tariff, 8 km. (5 miles)					

Personal care in Paris is globally 60% cheaper than in London (in €)					
Paris London					
General practitioner's appointment / Short visit to private Doctor (15 minutes)	26	99			

Entertainment in Paris is around 10% cheaper than in London (in €)				
	Paris	London		
2 tickets to the movies	21	27		
2 tickets to the theater (best available seats)	82	161		
1 month of gym membership in business district	50	50		

www.expatistan.com, 2020

Europe's largest talent pool

Home to a large, well-educated and international workforce, Paris Region is an ideal place to source technical skills and top talent. The region's world-class universities and engineering schools are a major draw for companies looking to recruit.

A breeding ground for talents

6.4M



of all jobs in France



Insee, 2018

5.9M salaried jobs 0.5M salaried jobs Insee, 2020, data 2018

Executives' average annual net salary: €56,450

Average annual net salary: €34,340 Insee 1/19, data 2015

7.5% Unemployment rate Insee, T3 2019

88% jobs in services 7% in industry 4.9% in construction 0.1% in agriculture Insee. 1/20. data 2018



Station F Insead © Patrick Tourneboeuf

The Paris Region's active population by professional category				
Managerial and highly-skilled occupations	1,688,314	27.7%		
Service workers, sales & administrative support	1,614,023	26.5%		
Skilled and mid-level employees	1,553,883	25.5%		
Laborers	840,028	13.8%		
Skilled tradesmen and business directors	293,645	4.8%		
Farm, fishing and forest operators	5,362	0.1%		
Others	99,892	1.6%		
Total Active population 15-64 years old	6,095,147	100%		

Insee, 12/19, data 2016 - Total population 15-64 years

Characteristics of the working population in Paris Region













© L'INSTITUT PARIS REGION Source: Insee, Ministry of Education data 2016, 2017

A highly qualified workforce in Science and Technology

The region is particularly distinguished by its highly qualified workforce, allowing it to rise to the rank of leader in a number of sectors: financial services, aerospace, defense, new mobility, green energies, but also in the fields of health, digital transformation, creative industries, logistics, food and cosmetics. EU28 Top 5 regions People employed in Science and Technology (2018) Greater London* 343,000 Oberbayem 184,300 **Paris Region** 1 404,000 Lombardy 218,500 Comunidad de Madrid 3 236,500 400 km NO C L'INSTITUT PARIS REGION ' Greater London = Inner London (East; West), Outer London (East and North East; Source: Eurostat 2020, data 2018 West and North West; South)

391,000

jobs in Information and Communication

344,000

jobs in Financial and Insurance activities

350,000

jobs in Manufacturing activities

Sector breakdown of business sites and jobs in Paris Region				
Business sector	Sites	Jobs		
Scientific and technical activities; administrative and support services	297,277	921,497		
Trade of automotive vehicles and motorcycles	214,742	703,961		
Public administration, education, human health and social work	127,135	218,135		
Construction	124,795	275,261		
Information and communication	84,992	391,249		
Other service activities	75,288	113,786		
Accommodation and food	64,002	270,923		
Transportation and storage	58,583	357,453		
Real estate activities	54,183	74,864		
Financial and insurance activities	52,575	343,810		
Manufacture of other industrial products	31,302	156,183		
Manufacturing of food products, beverages and tobacco products	8,274	50,560		
Production of distribution of water; sewerage, waste manage- ment and remediation activities	2,908	76,661		
Manufacturing of electrical, electronic and computer products, machinery and equipment	2,908	67,587		
Manufacturing of transport equipment	547	72,403		
Coking and refining	33	1,716		
Total Active population 15-64 years old	1,203,731	4,096,049		

© Insee, répertoire des entreprises et des établissements - Commercial activities excluding agriculture (2016)

The highest concentration of qualified students

Paris Region offers a world-class education system with an ever increasing number of programs catering to the needs of international students and families.

Universities, engineering, business and specialized schools rank among the most prestigious in the world and offer an internationally renowned education, providing each and everyone with the best adapted training curriculum.



Ecole Centrale, Saclay © Carlos-Ayesta

The French Education system

The education system is operated by the French Public Education Authority.

Schooling is compulsory from 6 to 16 years old.

Primary-school

6 to 10 years old

Public pre-school is available for children from 2 years old on.

Primary and secondary Education

Nursery from Pre-school / 3 months old Kindergarter 2-3 to 5 year

Kindergarten 2-3 to 5 years old

s old

Primary and secondary education (public and private)

3,200 nurseries 2,881 pre-schools 4,045 primary schools 1,213 secondary schools 811 high schools education (public and private) 1,327,948 pupils

Primary and secondary

90.4% in public schools 1,075,279 students 80.7% in public middle and high-schools 11 to 15 years old

Secondary-school

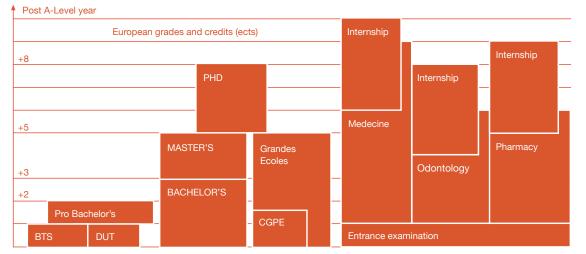
3,104,228

primary school pupils and middle and high-school students High-school 16 to 18 years old Diploma Baccalauréat

21[%]

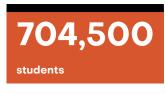
of France's pupil's population

Higher Education



MESR (French Ministry of Higher Education and Research) - BTS: Technical programs - DUT: University Diploma of Technology Grandes Ecoles: Engineering & Business schools - CPGE: class which prepares students to enter the Grandes Ecoles

Highly educated students





of the adult population holds at least a bachelor's degree

384,593 students in Paris Region's public universities

26.3% of France's student population

99 doctoral schools 26,200 PhD students



of PhD students in France

16 Public universities

70 "Grandes Ecoles" (elite schools) incl. 49 engineering schools

Main branches of higher Education in 2018-19

Bachelor's, Master's degree and PhD: 285,234

Business schools, management and accounting: 67,148

Engineering schools: 43,795

Preparatory classes for the Grandes Ecoles: 29,840

Advanced technician programs: 45,741

67,000 students in business schools University Diploma of Technology: 17,695

Paramedical and human services schools: 27,687

Other university diplomas, including health: 114,094

Others (art, architecture, private universities, etc.): 73,363

44,000 students in engineering schools

Ministry of Education, Higher Education and Research, RERS 2019, data 2018-19, Campus France



Fields of study **Total Students** % Law, Political Science 60,220 15.22 Economics, Administration 48,547 12.27 Letters, Art, Languages, Humanities and 131,597 33.25 Social Sciences Sciences* 77,207 19.51 Sports 7,568 1.91

Breakdown of the students in Paris Region's public universities in 2018-19 - Bachelor's, Master's, PhD by field of study

University Institute of Technology Fields 17,805 Grand Total 395,591

* (Basic and Applied sciences / Natural and Life sciences / Interdisciplinary sciences) Source: Ministry of Education, Higher Education and Research, data 2018-19

33°

Subtotal General Fields

Health sector

Letters, Art, Languages, Humanities and Social Science **20**[%]

325,139

52.847

82.15

13.35

4.50

100

Sciences

Educational excellence with an international outlook

The excellence in higher education and research in France is widely acknowledged around the world.

Numerous Paris Region prestigious universities and higher education institutions stand out in the most reputable international rankings, such as the Financial Times ranking, the Times Higher Education, the Shanghai ranking (ARWU)...

Young people benefit from prestigious universities and exceptional graduate and specialized schools.

Prestigious Universities

3 Paris Region Universities in the ARWU Top 100

Paris-Sud University #37 Sorbonne University #44 Ecole Normale Superieure #79 Academic Ranking of World Universities 2019

2 of the world's 5 best Universities in Mathematics

Paris-Sud University #2 Sorbonne University #9 ARWU Global Ranking of Academic Subjects 2018

5 higher education institutions in the Top 200

Paris Sciences et Lettres – PSL Research University Paris #45 Sorbonne University #80 École Polytechnique #93 Paris University #130 Telecom Paris #188 Times Higher Education World University Ranking 2020

2 of the world's 5 best universities in Atmospheric Science

University of Versailles Saint-Quentin-en-Yvelines #2 Sorbonne University #4 ARWU Global Ranking of Academic Subjects 2019



National Institute of Art History library (INHA) © Florence Humbert

A Region attracting foreign talent

Paris: 7th best student city in the world QS Best Student Cities, 2019



31% all foreign students in French higher universities

Of these, 80,600 in Paris Region's universities, which is 21.3% of the region's public university students.

8,238 foreign PhD students, i.e. 34% of PhD students in **Paris Reaion**

MBAs and Business Schools Financial Times Rankinas (2019/20)

3 of the Top 10 European **Business Schools** HEC Paris #1

INSEAD #5 Essec #7

3 of the Top 5 Masters in Management HEC Paris #2

Essec Business School #3 ESCP Europe #5

Global MBA program

INSEAD #4 HEC Paris #9

5 of the Top 15 Executive MBA programs

HEC Paris #1 HEC/LSE/NYU:Stern #3 Tsinghua University/INSEAD #9 ESCP Europe #14 INSEAD #19



Hec Paris © Nathalie Ounjian

Specialized schools

GOBELINS, the school of the image, ranked #2 best school of animation in the world 2018 International Animation School Rankings

Institut Français de la Mode #2 best Master in Fashion Management in the world behind Fashion Institute of Technology of NY #2 best Master in Art Direction and Communication in the world, behind Central Saint Martins of London CEOWORLD magazine, Business of Fashion, 2019

ESMOD International, Paris, #7 best fashion school in the world CEOWORLD magazine, Fashion school ranking, Business of Fashion, 2019

Foreign students in Paris Region's universities in 2018-19				
	Paris Region	France	% Paris Region / France	
Africa	38,117	129,341	29.5	
Americas	8,103	22,432	36.1	
Asia	14,514	48,027	30.2	
Europe	19,745	60,004	32.9	
Others	134	486	27.6	
All	80,613	260,290	31	

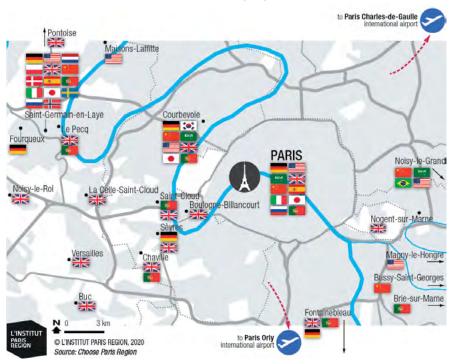
Ministry of Education, Higher Education and Research, 2018

A growing offer of international and bilingual education

Paris Region has an extensive selection of international schools open to more than 23.000 foreign and French pupils from kindergarten to high school: 7 international public high schools and 2 scheduled for 2021 and 2023

Near 120 schools with International Sections (bilingual programs) or Binational Sections offering bicultural education and intensive schooling in 17 different foreign languages. French schools with International Sections follow the national French curriculum and offer an International Section where foreign languages are taught and where some courses such as history, geography, literature are taught in a language other than French.

165 International Sections in 17 different languages



	Elementary schools	Secondary schools	High Schools		Elementary schools	Secondary schools	High Schools
British	10	20	14	Polish	1	2	2
American	4	7	5	Danish	1	1	1
Chinese	6	7	5	Dutch	1	1	1
German	6	6	4	Norwegian	1	1	1
Portuguese	3	8	4	Swedish	1	1	1
Arab	2	4	4	Russian	1	1	1
Italian	2	3	2	Brazilian	0	1	1
Spanish	2	3	2	Korean	1	1	0
Japanese	3	3	2				

A variety of curriculum and diplomas

Near 40 international private schools, including well-known schools: . British School of Paris,

- . American School of Paris,
- . International School of Paris,
- . Jeannine Manuel,
- . EIB Paris.
- . Marymount,
- . Deutsche Schule Paris,
- . Liceo italiano Leonardo da Vinci,
- . Liceo Español Luis Buñuel, etc.

The new European School in Paris-La Défense (Courbevoie) and other ongoing or upcoming school projects.

Diplomas in Paris Region		
European Baccalaureate	Courbevoie	
International Baccalaureate (IB) diploma	Paris, Maisons-Laffitte, Saint-Cloud, Verneuil- sur-Seine	
A-Levels	Paris, Croissy-sur-Seine	
US High School Diploma	Paris, Saint-Cloud, Verneuil-sur-Seine	
ABIBAC - German Abitur Allgemeine Hochschulreife + French Baccalaureate	Paris, Combs-la-Ville, Le Raincy, Dourdan, Courbevoie, Enghien-les-Bains, Rueil-Malmaison, Buc	
BACHIBAC – Spanish Bachillerato + French Baccalaureate	Paris, Noisy-le-Grand, Maisons-Alfort, Montigny-le-Breton- neux, Sartrouville, Dourdan, Bois-Colombes, Sceaux, Ermont, Pontoise	
ESABAC – Italian Esame di Stato + French Baccalaureate	Paris, Saint-Denis, Saint-Maur-des-Fossés, Rambouillet, Massy, Bois-Colombes, Sarcelles	
OIB - French Baccalaureate with an International Option	Paris, Buc, Courbevoie, Fontainebleau, La Celle-Saint-Cloud, Maisons-Laffitte, Nogent-sur-Marne, Noisy-le-Grand, Pontoise, Saint-Cloud, Saint-Germain-en-Laye, Sèvres, Versailles	

Paris Region international education guide:

internationaleducation. parisregion.eu

Paris Region, an innovation powerhouse

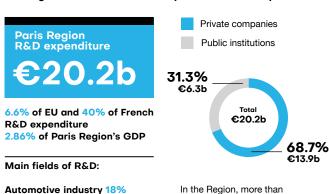
The Paris Region is an exceptional land in terms of research and innovation. Its diversified economy is buzzing with top-ranked high-tech clusters and research centers, which generate exciting opportunities for cross-sector collaboration.

Research and development in the Paris Region is mainly carried out by private companies which account for two thirds of total expenditure and represent more than 85% of design-research jobs.



Plate-forme EVR@ - Laboratoire IBISC, Université d'Evry - Paris Saclay

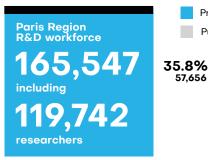
#1 in Europe for R&D



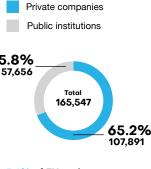
The highest amount of R&D expenditure in Europe

Automotive industry 18% Pharmaceutical industry 11% IT activities and information services 10.0% Specialized activities, scientific and technical, 7.5% Aerospace 6.8% In the Region, more than two-thirds R&D expenses are made by companies

The largest R&D talent pool in Europe

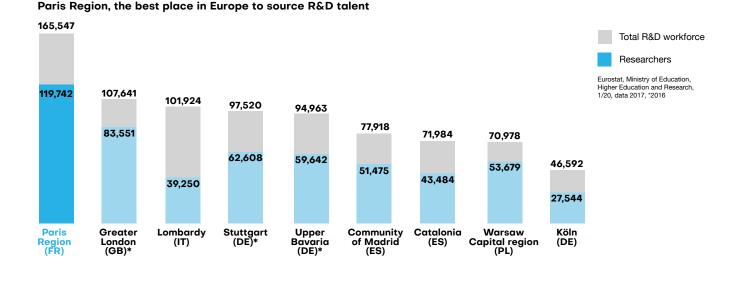


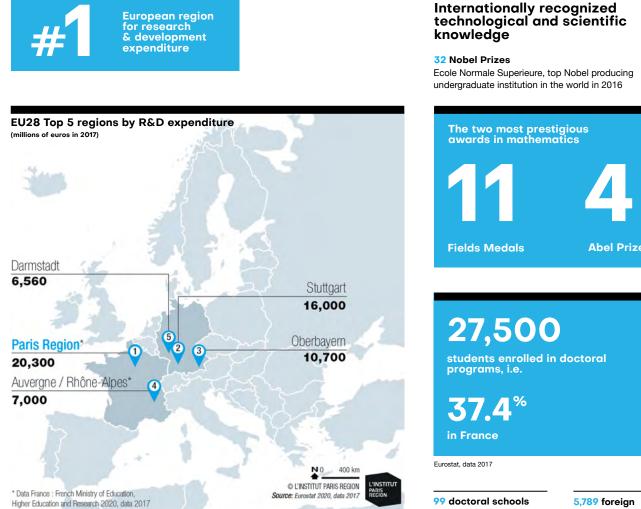
These professors, researchers, engineers, technicians and support staff work in universities, Grandes Ecoles, public institutes and companies.



5.6% of EU and 37.5% of French R&D employees 40.5% of the researchers in France

Ministry of Education, Higher Education and Research, data 2017





At the forefront of innovation

7,687 patents filed, i.e 58.5% of the patents filed in France INPI, data 2018

Paris Region is the European leader, and accounts for 4.4% of all European patent applications in EU-28.

#3 region in the world in volume of papers in international journals (51,000) behind Beijing and Tokvo Elsevier/scopus, data 2014

Nearly 500,000 scientific publications registered in Paris Region, mainly in the fields of medical research, physics and astronomy, engineering sciences, biochemistry, genetics, and molecular biology, according to the Scopus database, between 2004 and 2014.

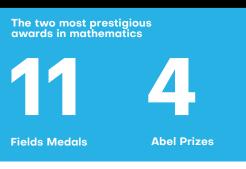
L'Institut Paris Region - OST

3 of the 10 world's most innovative research institutions

#3 CEA Alternative **Energies and Atomic** Energy Commission

#8 CNRS National **Center for Scientific** Research

#9 INSERM National Institute of Health and **Medical Research** The world's most innovative Research Institutions, 2019



8,238 foreign PhD students Ministry of Research, 2018-19

Paris, European leader and #9 largest science and technology clusters in the world according to the **Global Innovation** Index 2019 OMPI, 2019

5,789 foreign researchers 40.2% of foreign researchers in France FNAK, data 2018

The highest number of people employed in the fields of science and technology and scientifics and engineers in Europe Eurostat, data 2018

A thriving technological hub at the heart of Europe

The Paris Region is home to an exceptional diversity of sectors. Companies across all industries will find a hub that gathers the major players in their area of business and research. Paris Region's diversified economy is buzzing with top-ranked high-tech clusters and research centers.

This unique landscape generates exciting opportunities for cross-sector collaboration. For example, combining IT and healthcare, or automotive and eco-technology.



Aeronautics, space and defence

336 members, incl.
125 major groups,
130 SMEs,
49 labs and teaching institutions

73 projects funded since the cluster was founded Total funding: 313 million €



Financial services

500 members, incl. 160 major groups, 300 SME's, 20 labs and teaching institutions

28 projects funded since the cluster was founded Total funding: 80 million €

cap-digital

Digital & ecological transformation

1,032 members, incl. 86 major groups, 850 SME's, 75 labs and teaching institutions 12 investments funds 9 urban communities

810 projects funded since the cluster was founded Total funding: 1,700 million €



High-tech healthcare and new therapies

476 members, incl.
34 major groups,
400 SME's and startups
40 labs and teaching institutions

371 projects accelerated by the cluster Total funding: 2,073 million €



8 regional competitiveness

2,600

ecosystem.

Over

projects

clusters make up this dynamic

COSMETIC VALLEY

Perfumery and cosmetics

600 members, incl.
80 major groups,
520 SME's,
200 labs and teaching institutions

350 projects funded
 since the cluster was
 founded
 Total funding:
 450 million €

MOV'CO Imagine mobility

Transport and mobility

447 members, incl.
44 major groups,
312 SME's,
35 labs and teaching institutions,
14 local authorities
& institutional bodies

260 projects funded since the cluster was founded Total funding: 1,120 million € 4,360 members including: 3,900 companies 584 labs and teaching institutions, ...





Rubber and polymer industry

138 members, incl.
11 major groups,
98 SME's,
4 start-ups,
25 labs and teaching institutions

89 projects funded since the cluster was founded Total funding: 265 million €

Systematic

European innovation and technology cluster in digital and Deep Tech

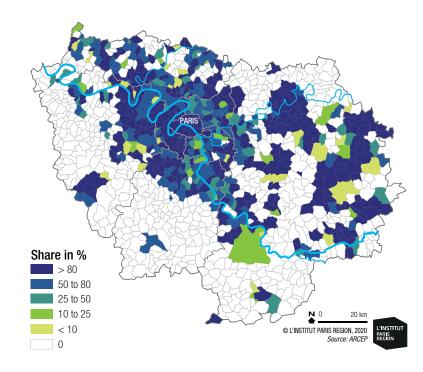
900 members, incl.
150 major groups,
600 startups / SME's / mid-cap companies,
140 labs and teaching institutions,
20 investors
20 local authorities & institutional bodies

625 projects funded since the cluster was founded Total funding: Over 3.18 billion €

Cutting-edge digital infrastructure

The Fiber to the Home Infrastructure currently covers almost 100% of the Region, making the system available to everyone in the Region regardless of if they live in a dense urban environment or rural areas. The Region has a dense data center and telecom infrastructure, making it the 4th densest region in this sector in Europe for these types of uses.

FttH deployment in Paris Region Share of potentially connected premises at the city level State of the art 1st quarter 2019



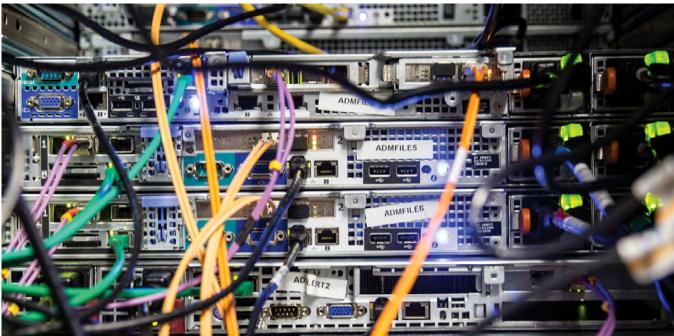
A smart and connected region

Launched in February 2013, the High-Speed Broadband France Plan aims to cover the entire country by 2022, by proposing high-speed internet access to all houses, businesses and government departments.

The Paris Region aims to be the first region in Europe to be entirely equipped with fiber-optic cables by 2020/2025.

Reliable telecommunications and networks

4G Mobile telephony – 4 operators – 99.8% of the population is covered ARCEP



Datacenter Ecole Polytechnique © EcolePolytechnique J.Barande

Europe's largest scope of real estate solutions

Paris Region is a constellation of diverse, specialized districts that make it a highly attractive location for a range of industries, research areas and lifestyles.

Its real estate market stands out for its size and liquidity with an offer of 55 million $m^2\!.$

Paris Region is home to Station F, the world's biggest startup campus, but also to hundreds of other incubators and accelerators in the region to help entrepreneurs grow their company.



STATION F Facade © Patrick Tourneboeuf

Office Space

ORIE and BNP Paribas Real Estate, 2018/19

Surface area 54.25 million m²

ORIE, 2018

Around 1,500 business activity areas

34 business districts Paris La Défense, 4th largest business district in the world Immediate supply 2.8 million m² Vacancy rate 5.1% Take up 1.7 million m² Space under construction 1.5 million m² BNP Paribas Real Estate, T3 2019

Prime rent Central Paris 880€/m²/year Prime rent Paris Region €399/m²/year, excluding taxes and charges for second-hand space €400/m²/year, excluding taxes and charges for new or refurbished space

BNP Paribas Real Estate, Immostat, 2019

54.2

Office stock in major world capitals in million m²

Paris Region				
New York (Manhattan)				40.2
Dallas/Fort Worth			28.	6
Chicago	26.5			
Houston	22.4			
Central London	20.9			
Munich		20.	B	
Berlin		19.5	5	
Los Angeles		18.7		
Frankfurt		15.4		
Q3 2018 for Europe, Q2 2018 for the USA ORIE for Paris Region, BNP Paribas Real Estate for other countries				

Paris Region more affordable than London in occupancy costs

Top 15 office space market by occupancy costs (2019) USD per m²/year			
Rank	Country	City	Occupancy costs m²/year in \$US
1	China	Hong Kong Central	322.00
2	United Kingdom	London West End	222.70
3	China	Hong Kong Kowloon	208.67
4	USA	New York Midtown Manhattan	196.89
5	China	Beijing (Finance Street)	187.77
6	China	Beijing (CBD)	177.05
7	USA	New York Midtown Manhattan	169.86
8	Japan	Tokyo (Marunouchi/ Otemachi)	167.82
9	India	New Delhi (Connaught Place - CBD)	143.97
10	United Kingdom	London (City)	139.75
11	USA	San Francisco (Downtown)	130.51
12	China	Shanghaï (Pudong)	128.51
13	USA	San Francisco (Peninsula)	116.28
14	Singapore	Singapore	114.28
15	France	Paris	110.02

Global prime office occupany costs, 2019, CBRE

Everything you need to scale up

Coworking areas, business centers, shared offices... The number of places where you can work as if you were at the office without going there has increased impressively in Paris Region in recent years.

3/4 of the sites have been created in recent years.



"third places," providing flexibility to business people, comprising:

223 coworking spaces 218 shared offices 87 fablabs 216 business creation or development support sites 200 micro-working spaces in stations

1,000 third places by 2021

The world incubator capital

Over 130,000 m² of space for start-up incubators have been created in recent years, including 34,000 m² at Station F, the largest incubator in the world hosting 1,000 start-ups, with some 3.000 desks.

By 2020, an additional 65,000 m² will be made available.

L'Institut Paris Region, 2020, data 2018-19 - Apur, Blue Office, Crocis, Mairie de Paris, Makery, MENESR, Multiburo, NCI, Neo nomade, Nextdoor, PRM, Région Île-de-France, Regus, Servorp, Stop & Work, Techonmap, L'Institut Paris Region © L'Institut Paris Region, Errst and Young/ULI

20 PARIS 00 80 6 1 Main geographical sectors Paris CBD Extended Paris CBD Core market (CBD not included) Other markets 34 business districts in Paris Region Main road network 20 km Built-up area © L'INSTITUT PARIS REGION, 2020

Source: L'Institut Paris Region

The Grand Paris Express, a great opportunity for urban projects

To enhance its attractiveness and competitiveness in our globalized world, the Paris Region is undertaking major infrastructure and urban planning projects, including the Grand Paris project, the largest urban project in Europe providing a new transport network, new residential projects, office districts, and R&D hubs open to international competitions to reinvent Paris Region. The Grand Paris Express is paving the way for a substantial increase in housing stock in the Paris Region.

The construction of Grand Paris Express stations is accelerating the urban renovation process and the renewal of the industrial zones around Paris.

Creation of 250,000 to 400,000 housing units. 10,000 and 15,000 housing units per year within a 800 m radius around the future stations.

In total, 1 million m² of urban projects will be connected to Grand Paris Express stations. 9 related real estate projects, nearby Grand Paris Express stations, have already been awarded to real estate operators

These 9 projects represent 1,900 housing units and 32,000 m² of offices and

- retail spaces.
- 1- Paris CBD, 6 500,000 m², 300,000 m² (project)
- 2- La Défense, 3 500,000 m², 700,000 m² (project)
- 3- Balard Val de Seine, 1,000,000 m², 175.000 m² (project)
- 4- Saint-Quentin-en-Yvelines, 600,000 m2,
- 140,000 m² (project) 5- Stade de France, 600,000 m²,
- 30,000 m² (project)
- 6- Rueil-sur-Seine, 550,000 m², 80,000 m² (project) 7- Gare de Lyon, 550,000 m², 40,000 m² (project)
- 8- Nanterre Préfecture, 500,000 m2, 200,000 m² (project)
- 9- Paris Rive Gauche, 500,000 m²
- 300,000 m² (project)
- 10- Innovel Parc, 450,000 m², 110,000 m² (project) 11- Clichy-St Ouen Victor Hugo, 400,000 m2,
- 180,000 m² (project) 12- Montparnasse, 400,000 m², 100,000 m² (project)
- 13- Bas Montreuil, 400,000 m², 10,000 m² (project)
- 14- Massy Atlantis, 350,000 m², 180,000 m² (project)
- 15- Noisy Mont d'Est, 350,000 m², 60,000 m² (project)
- 16- Evry Courcouronnes, 300,000 m²,
- 10,000 m² (project)
- 17- Rives de Seine, 300,000 m², 170,000 m² (project) 18- Neuilly Charles de Gaulle, 300,000 m2,
- 25,000 m² (project)
- 19- Porte d'Aubervilliers, 300,000 m2
- 20- Val de Fontenay, 300,000 m² 100,000 m² (project)
- 21- Noveos, 250,000 m², 75,000 m² (project) 22- Parc Icade Rungis, 250,000 m², 60,000 m² (project)
- 23- Champs-Pierreux, 250,000 m2,
- 35,000 m² (project) 24- Les Bruyères, 250,000 m², 45,000 m² (project)
- 25- Quai de Galliéni, 250,000 m², 20,000 m² (project)
- 26- Point du Jour, 250,000 m²
- 27- Pleyel, 250,000 m², 100,000 m² (project) 28- Cergy Préfecture, 200,000 m²,
- 10,000 m² (project)
- 29- Charlebourg, 200,000 m², 10.000 m² (project)
- 30- Neuilly Levallois rue de villiers, 200,000 m² 31- Les Louvresses, 200,000 m2,
- 35,000 m² (project)
- 32- Paris Nord II, 200,000 m²
- 33- Roissy Pôle, 200,000 m², 15,000 m² (project)
- 34- Porte de Montrouge, 200,000 m2

The Paris Region Office Market

County border

A world-class transportation network

Located at the crossroads of Europe, companies based in Paris Region can easily access a market of 500+ million customers and all major European cities.

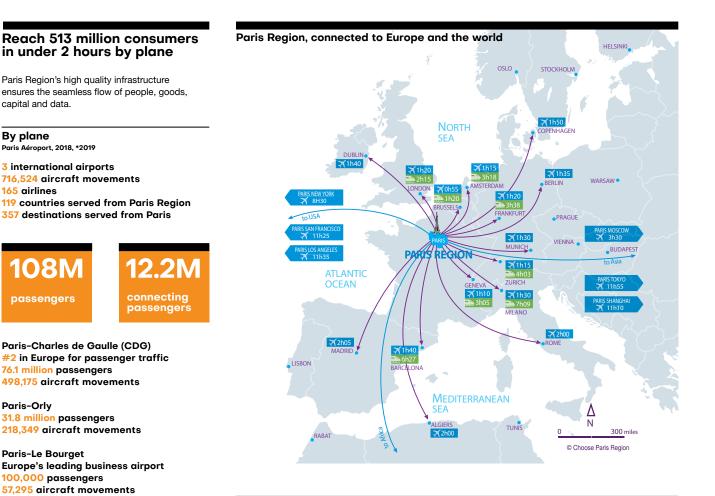
The Region is easy to get to, with 3 international airports and 7 TGV (high-speed train) stations.

As the Region prepares to host the 2024 Olympic Games, several large public infrastructure projects are currently in development and will be constructed by 2030, including the Grand Paris Express.

10 airfields and 1 heliport



Paris CDG Airport © Aéroport de Paris - Burlot



By train

SNCF, Arafer, 2017 and Ile-de-France Mobilités



1 million passengers on 3,550 trains per day on the Paris Region railway network 5 railway stations have traffic that exceeds 100,000 travellers daily Gare du Nord, #1 busiest European station 19 million TGV passengers travelling from Paris to main European destinations 4,700 km of railway tracks, of which 636 km of LGV (High Speed Line)

An efficient transit and mobility system at the regional level

Public transport, bicycles, electric scooters and scooters, self-service vehicles, autonomous cars, buses and driverless metros: the street is divided up thanks to a very diverse offer which is constantly expanding.

Type of	Number	Evolution
trips	of trips / weekday	2010/ 2018
Walking	17.2 million	+9%
Car	14.8 million	- 5 %
Public transport	9.4 million	+ 14 %
Bike	840,000	+ 30 %
Motorized two- wheeler	420,000	- 25 %
Others	380,000	x 2
Total	43 million	+ 5 %

Île de France Mobilités (2019)

4.7 billion trips by public transport in Paris Region				
Mode of traffic	Lines	Millions of trips*		
Subway	16	1,560		
Train - RER** (SNCF - RATP)	14	1,409		
Tramway	10	315		
Bus/night buses	1,510	1,436		
Total	1,550	4,720		

Île de France Mobilités d'après Optile, RATP, SNCF (2017, *2016) ** High-speed metro

Public transport

2,753 km of metro, train, RER and tramway network 6,200 regional trains every day At rush hour, over 650 trains simultaneously. 385 stations at key points throughout the network 270 green buses (electric or gas) in circulation, more than 5,000 by 2025 47 night bus lines serving 200 towns and cities

Grand

Paris — express

The Grand Paris Express urban sites

Shared transport for alternative mobility

A growing offer with innovative and green alternative transport solutions to get around without polluting the environment.

Self-service and free-floating bikes, cars and mopeds

850,000 trips per day +30% since 2010. 40% of trips during the week are to go to work.

Velib Metropole, self-service bicycle system 16,000 bikes: 30% of electric power-assisted bicycles, 70% of traditional bicycles, 1,364 stations in 55 municipalities Around 70,000 trips per day

Véligo Location, a long-term rental service (6 to 9 months) of electrically assisted bikes 10,000 Véligo Location bikes

Free-floating bike, scooter and moped operators : - E-Bikes: around 4,000 - E-Mopeds: around 4,000

- E-Scooters: several

hundreds

Freefloating cars

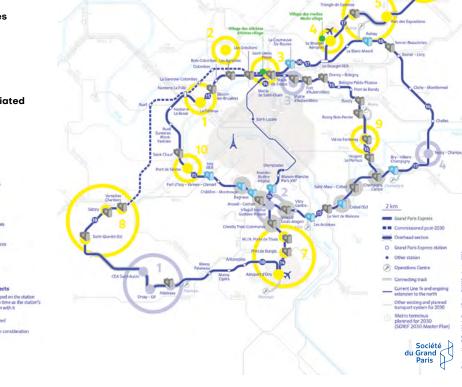
- Carsharing (car clubs)
- Carsharing peer to peer

L'Institut Paris Region, Ile-de-France Mobilités, Velib Metropole

A wide public transportation network, extended further by the Grand Paris Express

The largest urban development project in Europe providing a new transport network. Heavy investments in modernizing and expanding the public transport network.

200km of additional automated metro lines 68 new stations 2 million passengers everyday €35b invested through 2030 The project is set to link Paris Region's 3 airports, as well as business districts and scientific clusters. 1 million m² of construction projects associated with the Grand Paris Express project 300,000 m² of commercial space Over 7,000 residential projects



Paris 2024 Olympic and Paralympic venue

iness hub 1. La Défense . Saint-Denis Plevel 4. Le Bourget ingle de G Grand R 7. Orly - Rungis Logistics airport, No. 8. Satory - Saint-Quentin - Versai 9. Val de Fontenay 10. Front de Seine - Val de Seine Fertiary, digital and cultural of the west of lie-de-France

University re-I. Paris Saclay 2. Vallée de la Bièvre and life t Cité Descartes

operation develope gned at the same ti nd in cool

The related projects of Pre-project studies

- ited real-estate project

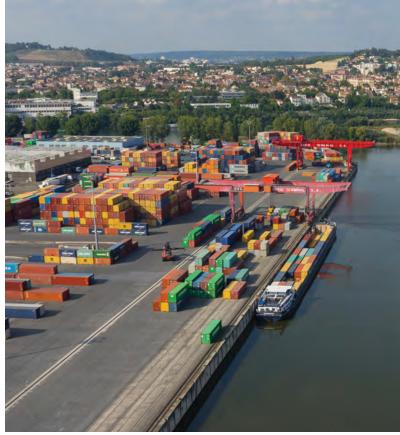
- . Campus Condorcet Io. 1 European university hu

Cost-effective logistics

Paris Region sits at the geographic heart of Europe. An outstanding transport and telecommunications infrastructure connects the French capital to all of the world's major economic regions.

Paris Region benefits from a catchment area with an estimated 25 million inhabitants within a 200-kilometre radius.

Paris Region is an ideal hub for logistics and shipping, with very efficient infrastructure to get your goods to market.



Port of Gennevilliers © HAROPA - Ports de Paris

Significant capacity in logistics real estate

Warehouses > 5,000 m2

Surface area: 19 million m² (ORIE 2018) Take up: 1.1 million m² (Immostat, 2018) Available now: 1.1 million m² (as of 1/1/19) ORIE, Immostat, BNP Paribas Real Estate

Very competitive logistics costs

Prime rents in Q2 2019 per year Warehouses over 5,000 m² (in €)			
London Heathrow (United Kingdom)	179		
Helsinki (Finland)	120		
Dublin (Ireland)	106		
Berlin (Germany)	86		
Munich (Germany)	84		
Barcelona (Spain)	82		
Stockholm (Sweden)	80		
Frankfurt (Germany)	78		
Hamburg (Germany)	74		
Madrid (Spain)	74		
Warsaw (Poland)	64		
Amsterdam - Rotterdam (Netherlands)	65 / 68		
Paris Region (France)	56		

European Logistics Market, Property Report, 8/2019 (data Q2 2019) BNP Paribas Real Estate - Panel of regions

Air, road, waterway and railway logistics



Air: 2.20 million tonnes of freight and mail handled 80 stands for Cargo aircraft at Paris-Charles de Gaulle

About 90% of the national cargo is handled at Paris-Charles de Gaulle airport ACI Europe Statistics, Aéroports de Paris, 2018



12,000 km of roads, including 497 km of national roads and 613 km of highways Freight 175 million tonnes of goods SOes, TRM survey, 2017



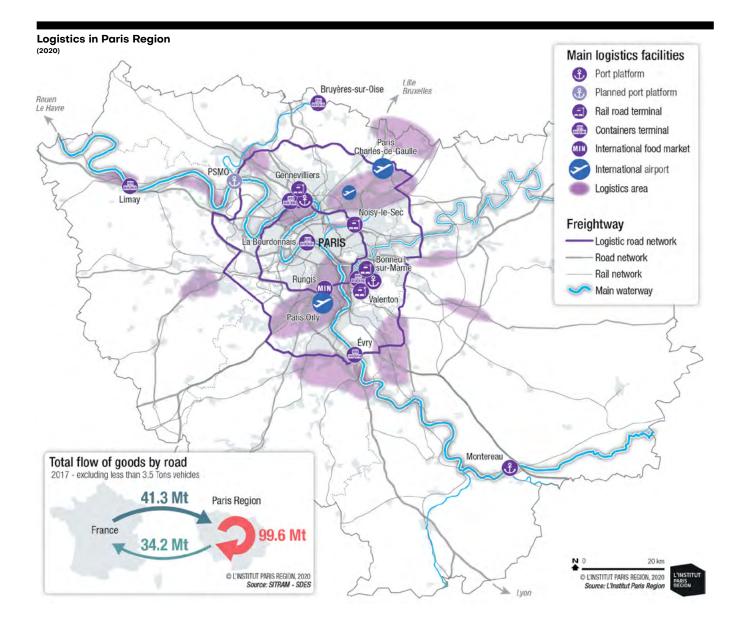
60 urban ports 10 multimodal platforms 500 km of navigable waterways 1,000 ha of port areas 6 container terminals 4 rail/road terminals Valenton #1 Rail/Road terminal in France

Waterway: 25 million tonnes of goods 179,000 TEUs were handled

Haropa, 2019

Rail freight

10 million tonnes of goods by rail, including 1.5 million through Paris Region ports Setra 2014



Flow of goods through main ports in Paris Region				
	Waterway (thousand tons of goods)	Containers (TEUs*)	Railway (thousand tons of goods)	
Gennevilliers	3,381	116,704	539	
Limay	1,304	4,818	495	
Bonneuil-sur-Marne	945	14,966	499	
Bruyères-sur-Oise	351	3,579	0	
Evry	423	0	0	
Précy-sur-Marne	85	4,820	0	
Paris-La Bourdonnais	67	13,047	0	

* Twenty-Foot Equivalent Units Haropa- Port de Paris, 2019, data 2018

An exceptional place for events

The Paris Region has this almost unique characteristic in the world of being a leading destination both in the leisure tourism segment and that of business. More than 400 trade fairs, 1,200 congresses and 3,000 events are held each year.

With approximately 700,000 $\rm m^2$ of floor space, it offers the richest and most varied range of reception facilities for business events in Europe.

<image><image>

A real know-how in hosting major trade shows CCI Paris ile-de-France, data 2019

The #1 offer of exhibition space in the world

700,000 m²

22 exhibition and conference venues

446

trade shows

446 trade shows, including 230 professional trade shows and 226 public trade show 108,153 exhibiting companies, including 32,280 foreign companies (30.8%) 9.4 million visitors, including 842,547 foreigners (8.9%) €5b in economic benefits

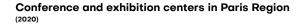


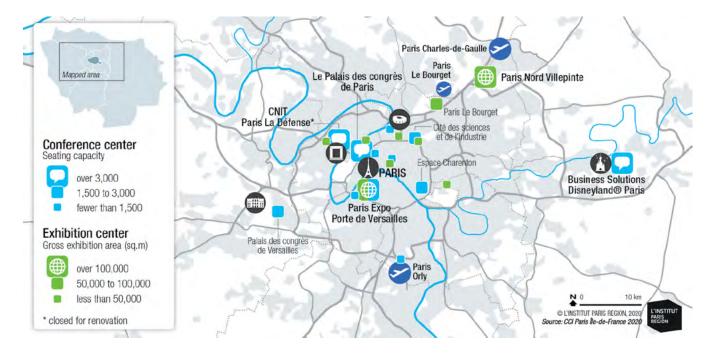
73,300 jobs generated by trade shows €22.6b turnover by exhibiting companies at trade shows, of which €10.3b realized with foreign customers 7 million contracts concluded at trade fairs

9.4M

Top 10 professional and public trade shows held in Paris Region (by numbers of visitors and exhibiting companies)				
Trade Show Name	Business sector	Visitors (1st visit)	Exhibiting companies	Year
Mondial de l'Automobile / Paris Motor Show	Transport, logistics, traffic and related equipment	1,068,194	500	2018
Salon International de l'Agriculture / Paris International Agricultural Show	Agriculture, horticulture, livestock farming, floristry, fishing and related equipment	637,519	990	2018
Foire internationale de Paris	Multi-sector tradeshows and trade fairs	467,855	2,236	2018
Salon international de l'Aéronautique et de l'Espace / International Paris Air Show	Defence, civil and military security	270,430	2,419	2017
Salon Nautique International de Paris / Paris Boat Show	Tourism, sports and leisure activities	163,930	650	2018
Paris Games Week	Tourism, sports and leisure activities	197,922	180	2017
Maison&Objet	Home decor, interior design architecture and lifestyle culture	157,882	5,614	2018
SIMA, Mondial des Fournisseurs de l'Agriculture et de l'Elevage / Paris International Agribusiness Show	Agriculture, horticulture, livestock farming, floristry, fishing and related equipment	123,378	849	2017
Salon du livre de Paris / Paris Book Fair	Art, culture, music and shows	111,809	883	2018
Salon des vins des vignerons indépendants / Independent winegrowers' wine fair	Food, hotel and restaurant amenities	80,342	6,913	2018

UNIMEV, OJS, Organizers' declaration





The place to meet

The Paris Convention Center, the largest convention center in Europe, made-to-measure spaces for large-scale international conferences 15 minutes from the Eiffel Tower, in the heart of the Paris Expo Porte de Versailles Park. It can accommodate up to 35,000 people in gigantic, fully modular spaces.

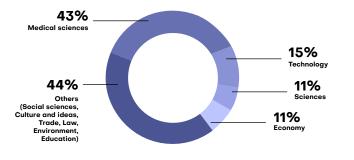
Paris, the world's # 1 leading destination by number of meetings organized in 2018				
City	#meetings	Rank by #meetings	#participants	Rank by #participants
Paris	212	1	126,343	2
Vienna	172	2	104,775	3
Barcelona	163	4	134,838	1
Berlin	162	5	87,623	4
Madrid	153	3	71,885	5
Lisbon	152	6	67,382	7
London	150	7	54,788	8
Singapore	145	8	69,261	6
Prague	136	9	42,451	10
Bangkok	135	10	53,668	9

ICCA City ranking measured by number of meetings organized in 2018 (12/6/19)

1,200 conventions per year in Paris Region OTCP, 2018

1,192 conventions in 335 venues 882,400 participants 32% were foreign visitors (298,600) €1.4b in economic benefits 22,650 jobs created by conventions

Breakdown of conventions by business sector (2018)



OTCP

The finest lifestyle

Life in Paris Region offers something for everyone. There's a reason why Paris Region is the #1 destination on the planet: with 50 million visitors each year, the area is synonymous with "art de vivre", culture, gastronomy and history. Leisure and entertainment options in the Region are practically unlimited - cinemas, shows, theaters, concerts, operas, shopping at its best, gourmet restaurants, cafés, sports clubs, sport events and more... The Region is also committed to improving the environment, preserving biodiversity and reducing carbon emissions.

A great place to live in

5.7 million housing units	Private housing rents in Paris Region				
72% flats, 4.1 million		Paris	Inner suburbs	Outer suburbs	Paris Region
26.3% houses, 1.5 million	Surface in m ²	50	52	57	53
	Rent in €/m²	23.3	16.9	13.8	13.8
	Average monthly rent in €	1,165	877	794	960
		opt op ot 1/1	(10		

OLAP, 2019, Average rent as at 1/1/19

A green region



50% agricultural space 28% wooded areas, natural world 23% urban space 1% water 4 regional nature parks representing 18% of the land area (218,520 ha), 2 in project 35 "Natura 2000" sites

More than 700 sites of ecological interest 15,171 ha in organic farming Short food circuits are in place for 800 farms (16%) 95,820 ha of forest open to the public 67 sustainable neighborhoods in Paris Region 113,000 homes programmed within these accredited neighborhoods. 250,000 inhabitants of the Paris Region should eventually live in one of these exemplary neighborhoods. A very high level of urban services (water, waste, eneray...) IAU/MOS 2017, Insee, IAU ÎdF

A population in good health

The French health care system is one of universal health care largely financed by government. It is unique in the world, as everyone receives the same high level of care and treatment regardless of income.

The Paris Region is the leading European region for pharmaceuticals and has the largest hospital system in Europe.

9,505 general practioners 9,451 dentists 4,321 drugstores



Moret-sur-Loing © JP. Chasseau CDT77

An unrivalled cultural offering

307 cinemas, 1,073 screens 361 theaters 5 opera houses 47 foreign cultural institutes and centers (FICEP) 65 million visitors in the top 10 cultural sites in Paris 5.6 million visitors attending the 10 largest exhibitions in Paris in 2018 1/3 of the regional on the territory is remarkable for its built or landscape heritage 271 villages of characters

5 Unesco sites (2019)

Palace of Versailles Paris, the Banks of the River Seine Fontainebleau Château and Park Medieval City of Provins Le Corbusier's architectural work

4,000 historic monuments

140 museums



European most visited exhibitions

Inspirative

The Paris Region is a popular setting for French and international films.



Ride in Saint-Germain-en-Laye forest © CRT IDF Tripelon-Jarry

Iconic touristic attractions

Top most visited tourist sites in Paris Region (millions of visitors - 2018)			
Disneyland® Paris	15.1		
Notre-Dame de Paris*	12		
Sacré Cœur de Montmartre*	11		
Louvre Museum	10.1		
Palace of Versailles	8.1		
Eiffel Tower	6		
Pompidou Centre	3.5		
Orsay Museum	3.3		
Cité des Sciences et de l'Industrie	2.2		
National Natural History Museum	2.04		
Notre-Dame de la Médaille miraculeuse Chapel*	2		
Arc de Triomphe	1.7		
Quai Branly Museum	1.3		
Sainte-Chapelle	1.3		
Army Museum	1.2		
Atelier des Lumières	1.2		
Petit Palais	1.2		
Louis Vuitton Foundation	1.14		
Grand Palais	1.1		
Cité médiévale de Provins	1		
Cite medievale de Provins	1		

* free admission, estimate - CRT Paris Ile-de-France, 2020 data 2018

3

of the world's most visited museums



Top cultural events in Paris Region (By number of visitors - 2018)			
European Heritage Days*	500,000		
Techno Parade*	300,000		
Solidays	212,000		
Medieval Shows in Provins	183,300		
Download Festival	120,000		
Lollapalooza Paris	120,000		
Rock en Seine	90,000		
International Contemporary Art Fair (FIAC)	72,500		
Art Paris Air Fair	58,789		

* free admission, estimate - Source: CRT Paris Ile-de-France, 2020 data 2018

Insee, CRT Paris Île-de-France, 2020, data 2018) AECOM - The Art Newspaper, Special Report, Number 311, April 2019.

The world's favorite tourist destination

50.1 million tourists, including 22.2 million foreigners (44.3%) 191.9 million night stays, half the total night stays in France, including 101.9 million for international tourists (53.1%) €21.7b in economic benefits 120,000 businesses 511,000 jobs

CRT Paris Île-de-France, 2019, data 2018

One of the largest hotel facilities in the world

156,880 rooms

71 million hotel night stays, half the total night stays in France 2,465 hotels 10 luxury hotels Insee, data as 01.01.19, CRT Paris Île-de-France, 2019, data 2018

Provenance of main foreign tourists in Paris Region (2018)

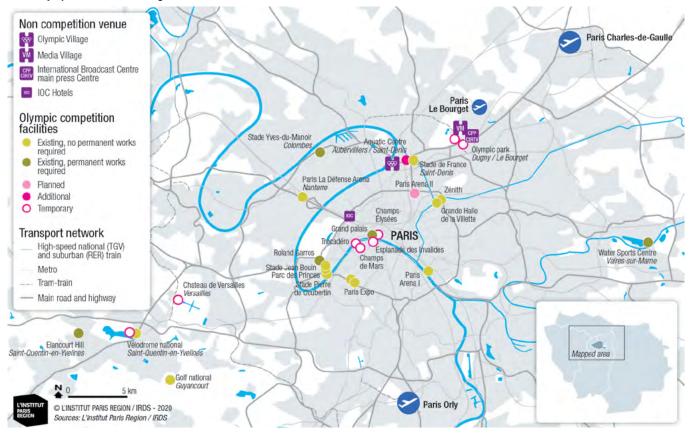
The main international customers in the Paris Region are Americans (4.8%), British (4.0%), Spanish (3.1%), Italians (3.0%) and Germans (3.0%). European customers (including the French) account for 80.6% of tourist stays.





Versailles - The Gardens © Christine Tarquis, L'Institut Paris Region

2024 Olympic sites in Paris Region



Sports and leisure activities

19,200 sports clubs, 8,607 sports facilities 2.4 million sports club members 12 leisure resorts (3,000 ha) 5,393 tennis courts, 419 swimming pools 620 equestrian centers, 106 golf courses

Some popular sporting events

(2019)

Tour de France (cycling race): 545,000 spectators Paris Open, Roland-Garros (Tennis): 480,000 spectators Women's World Cup: 250 000 spectators for 7 matches in the Region

Major events



Football (soccer): 267,312 licences Tennis: 221,713 licenses Judo: 109,996 licences Golf: 103,415 licences Riding: 93,036 licences INJEP-MERES, Recensement des licences, 2018, RES, Sports Ministry, 2017

NatWest 6 Nations championship (rugby): 150,000 spectators Paris Marathon: 57,000 participants, 250,000

spectators GayGames: 105,000 spectators

European Championships in Women's Artistic Gymnastics, April-May 2020

European Championships athletics, August 2020

ECA Canoe Freestyle European Championships, October 2020

CRT Paris-Ile-de-France, Estimates IRDS, Schneider Electric Marathon, L'Equipe

Paris 2024 Olympic and Paralympic Games

Olympic Games July 26th - August 11th, 2024

Venues

95% existing or temporary facilities 1 sports venue to be built specifically for the Games: the Aquatics Center in Saint-Denis 80% of venues located within a 10 km radius of the Village 22 sports within a 10 km radius of the Village 90,000 hotel rooms within 10 km of the city center

Sustainable

55% smaller carbon footprints than London 2012

Paralympic Games August 28th - Sept. 8th, 2024

Travel

Paris2024 media

85% of athletes accommodated within 30 minutes of their competition venue **30% of athletes** accommodated within 5 minutes of their competition venue (Stade de France and Aquatics Center) 100% of training venues (excluding competition venues) within 20 minutes of the Village 100% of venues accessible by environmentally friendly public transport 400 meters maximum distance to a metro station from any location in Paris

The world capital for shopping (2018)

Paris is the international capital of fashion and creation. Between luxury houses, department stores, designers trend, concept stores and outlets, the Paris Region is a popular shopping destination for French and foreign tourists.

223 shopping centers, including Westfield Les Quatre Temps, the Westfield Forum des Halles, Vill'Up, the Carrousel du Louvre, Beaugrenelle, Bercy Village, La Vallée Village.

16 major department stores: Galeries Lafayette, Printemps, Le Bon Marché, BHV, Marais...

Rungis International Market, the world's biggest fresh

produce market 9.4 billion euros turnover **18 million consumers**

1,200 companies

6,710,450 visitors **3** million tonnes of goods

A unique culinary desination

Westfield Les Quatre Temps-Le CNIT

> French and European shopping destination





Westfield Les 4 Temps La Défense business district © C. Tarquis, L'Institut Paris Region.

3 Paris region shopping centers are among Europe's top 5 centers (annual footfall, in million visitors 2018)			
Westfield Les Quatre Temps/Le CNIT (La Défense, Paris Region, France)	56.5		
Westfield Stratford City (London, United Kingdom)	51.6		
Westfield Forum des Halles (Paris Region, France)	48.8		
Bullring (Birmingham, United Kingdom)	39.2		
La Part-Dieu (Lyon, France)	31.1		
Westfield London (London, United Kingdom)	30.2		
Hoog Catherine (Utrecht, Netherlands)	27.0		
Manufaktura (Lodz, Poland)	21.2		
Créteil Soleil (Créteil, France)	21.0		
La Vaguardia (Madrid, Spain)	20.9		

Sites commerciaux nº 291, septembre 2019



3-stars

2-stars

Ferrandi School © Aurelia Blanc-CCI Paris Ile-de-France



Parisian cafes, organic cafes,... there is something for every taste! Guide Michelin

23,000 restaurants

The world's biggest fresh produce market 5,600 m²

the largest organic market in Europe

Rungis

Specialities produced in Paris Region

1,000 products and 70 kinds of fruits and vegetables

Many culinary products are

the richness of the region:

Bries de Meaux and Melun. coulommiers, Vexin beer,

Gâtinais honey and saffron,

poultry from Houdan or

Grand Marnier.

rose petal confit from Provins, peppermint from Milly-la-Forêt,

pass through every year with around 300,000 references of fresh food products.

> and vegetables take their name from their place of cabbage, Marcoussis strawberries.

3rd for peas and 4th for beets, Cervia

An effervescent gastronomy scene

Sites commerciaux n°291, September 2019, Panorama/tradedimensions, Le guide 2019 de la distribution and L'Institut Paris Region

Several varieties of fruits

production: Argenteuil asparagus, Arpajon beans, Belle de Fontenay potatoes, mushrooms and hams, Montmorency cherries, Pontoise

The Paris Region is the leading French region for the production of parsley, watercress and radishes. It ranks 2nd for fava beans, lettuce or pumpkins.

Michelin-starred restaurants, incl.







Jogging in Le-Vesinet Parc © CASGBS-E. Desaux - Iles Fanac Joinville-le-Pont 6 © ParisEstMarne&Bois - Paris Mur des Je t'aime © CRT IDF-oshot-Capelle - Tourn - Eco-district of the Docks of Saint-Ouen © A. Fischer L'Institut Paris Region - Saclay © Contexte - Carré Sénart urban center - Multiple architects © Techniflight - La Defense business district from Louis Vulton Foundation -Architect Frank Gehry © Florence Humbert - SIAE Salon du Bourget 2019 © SIAE 2019 - Anthony Guerra & Alex Marc











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Why Paris Region?

A dynamic and fast-growing region, vibrant, innovative and sustainable.

The Paris Region is a truly global region with a population of 12 million. More than 50% of residents are under the age of 40. This young and cosmopolitan steadily growing population is not only benefits from the region's economic opportunities and enjoy an exceptionnal quality of life. Indeed, economic and demographic indicators point to a bright future for the region's development.

Who we are

As the premier business and innovation catalyst supporting international companies with their development in the Paris Region, we're here to guide companies and provide peace of mind as they set up operations in this dynamic ecosystem.

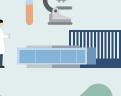
What we do

We help companies discover the market and provide a 360° crash course on doing business in France Our personalized services include setting up your company, opening a bank account, finding your ideal office space, recruiting top talent, relocating your international staff, navigating the administration, and identifying financial partners.



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6



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6-1



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