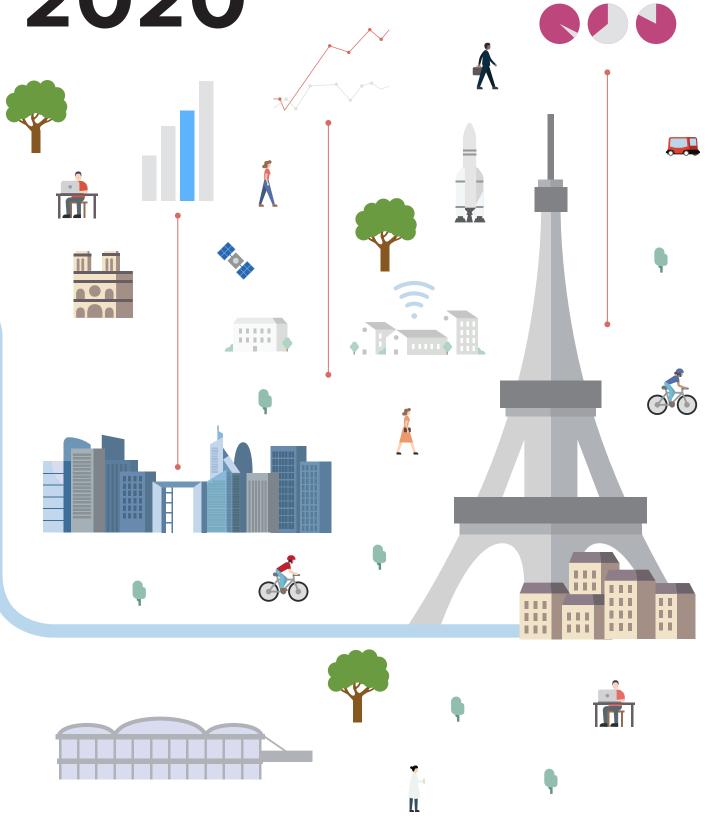
Paris Region ***RES & Figures 2020



















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 lle-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.



Tuileries Gardens - Eiffel Tower © CRT IDF - Van Biesen

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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

prizes....

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

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

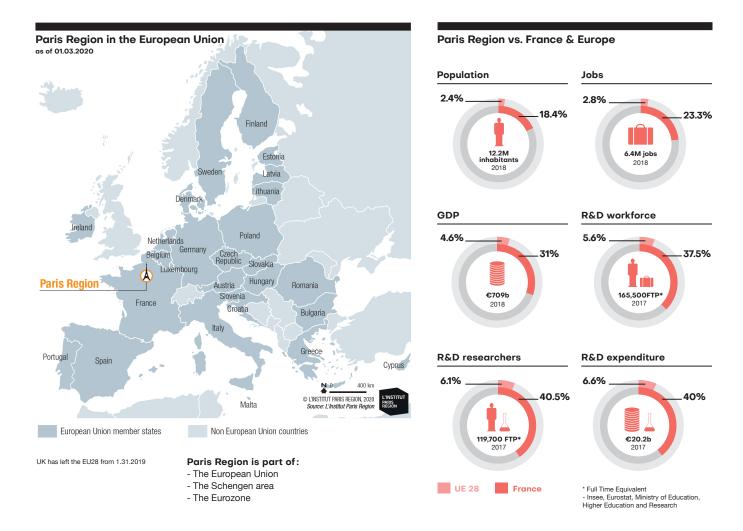
Paris 2024

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



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 region 13.9% of the population 2016

119,400 foreign students in higher education, including 80,500 in Paris Region's public universities

8,240 foreign PhD students

2018-19

5,800 foreign researchers

2018

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





GDP €709b GDP €58,300 per capita GDP €110,549 per job





1,166,000 companies

1,285,000 sites (all activities)

244,000 companies created

8,000 startups



inhabitants

per km²

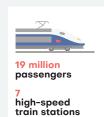


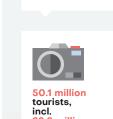




Export





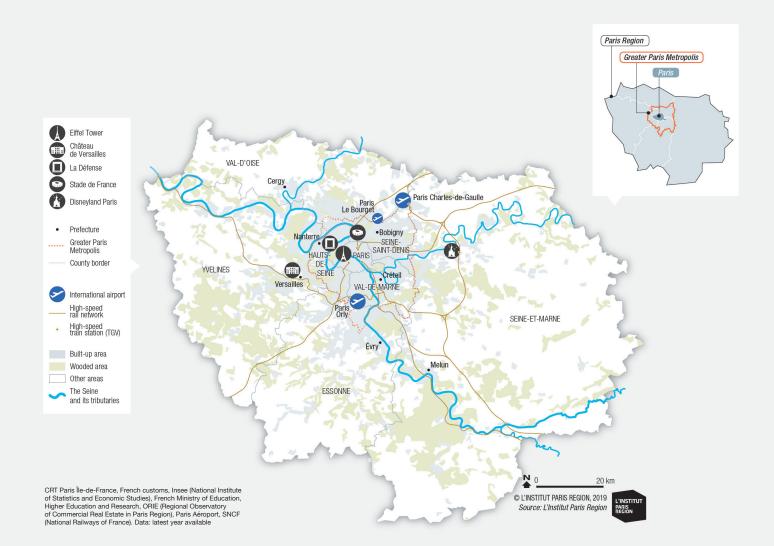


foreign tourists

165,500 R&D jobs incl.

119,700 researchers

€20.2b R&D expenditure



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...



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

Global Attractiveness

Global Cities Index 2019 on economic performances

#1 New York #2 London

#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

#5 Paris

A.T. Kearney

Dynamic Cities 2019

2019 Top 5 dynamic cities

#1 London

#2 Paris #3 Cambridge

#4 Berlin

#5 Amsterdam

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



fDi Intelligence

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 Ile-de-France Capitale Economique, Choose Paris Region

Cost & Quality of Life

Cost of living Survey 2019

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

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

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...



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

Emerging Trends in Real Estate, Europe			
2020 2019			
1	Paris	Lisbon	
2	Berlin	Berlin	
3	Frankfurt	Dublin	
4	London	Madrid	
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

Financial Times Education rankings 2019-20

HEC Paris #1

Best executive MBA program **Best European** business school Financial Times, 2019

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

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

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

12.2M

inhabitants

2.4% of the European Union's population

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

300,000

new inhabitants by 2025

of France's population

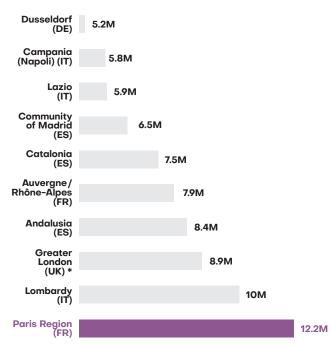
Over 100,000 inhabitants in 5 towns in Paris Region:

Boulogne-Billancourt Saint-Denis Argenteuil Montreuil

INSEE, Eurostat 1/20, data 2018



Paris Region, EU28's most populous region



Eurostat 2018 (data 2017), NUTS 2

^{*} Greater London= Inner and Outer London



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	Fran	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

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

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 1.6M

foreign people (1,687,542)

13.9%

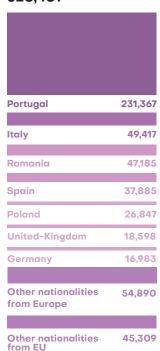
of the Region's population is foreign

Africa 792,425

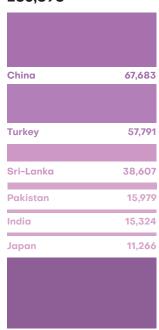


Other nationalities 301,698 from Africa

Europe 528,481



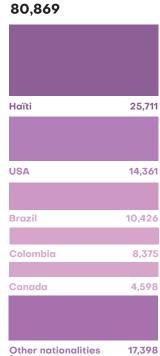
Asia 283,898



Other nationalities from Asia

77,218

The Americas

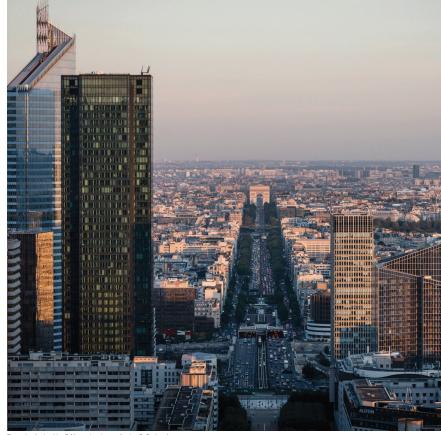


from the Americas

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.



From the Arch of La Défense business district © Carlos Ayesta

A dynamic and fast-growing region

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

Access to over **513 million** European consumers

Europe's highest concentration of Fortune 500 corporations

€709b

GDP

of France's GDP

4.6% of EU28 GDP

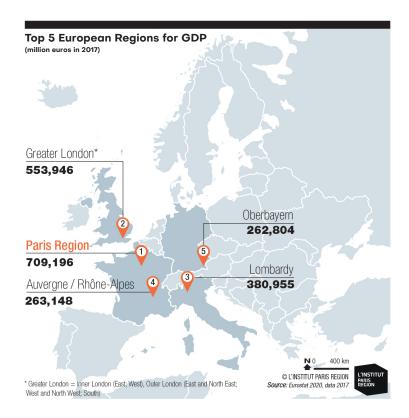
The Paris Region's economic dynamism benefits from its position at the heart of the world's economy.

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



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...



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...



Fashion, Design, Luxury

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



Cleantech, Energy, Smart City

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



Commerce / Retail

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



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...



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....



Financial Services,

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...



Food Industry

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



Healthcare & Life Sciences

AstraZeneca, Bristol-Myers Squibb, GlaxoSmithKline, Guerbet, Lilly, Pfizer, Roche, Sanofi-Aventis, Novartis...



Tourism, Hotels, Catering

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



M.I.C.E.*

Comexposium, Reed Midem, Viparis... Disneyland® Paris...

*Meetings, Incentives, Conventions, `

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.



INSEE, 2018, Commercial activities, excluding agriculture



INSEE, 2019

1,395,594

INSEE, 2020, data 31.12.15

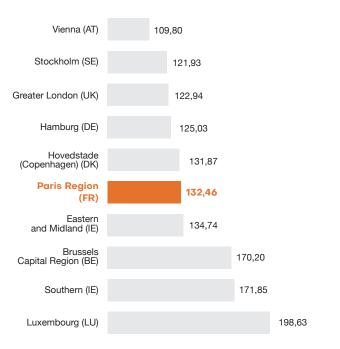
>8,000 startups

Dealroom/French Tech 2020

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

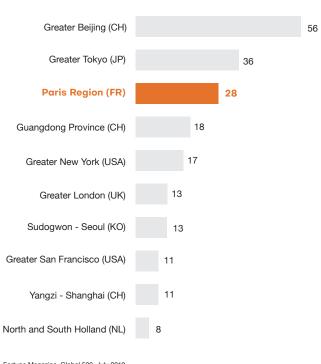
Top 10 Corporate Headquarters in Paris Region – Fortune Global 500				
	Revenues in million dollars	Total workforce		
Total	184,106	104,460		
AXA	125,578	104,085		
Carrefour	91,955	363,862		
Crédit Agricole	88,325	73,346		
BNP Paribas	83,974	197,162		
Electricité de France	81,403	165,790		
ENGIE	74,144	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



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



Paris Region, at the heart of World Trade

. . .,

Imports

€148.5b

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%

French Customs, 2018



Ariane Group © Département des Yvelines

Paris Region's leading business partners (2018)						
Тор	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.

Economy a

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

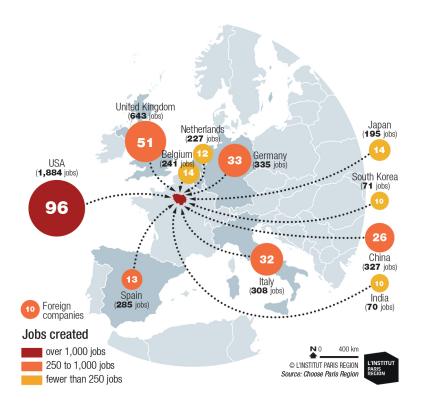
15,100

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



Renault Flins-sur-Seine plant © Nicolas DUPREY CD 78

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 m² (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 tariff, 8 km. (5 miles)	12	31		

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

jobs

23.3[%]

of all jobs in France

36%
of all French executives

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







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



Ages 25-29







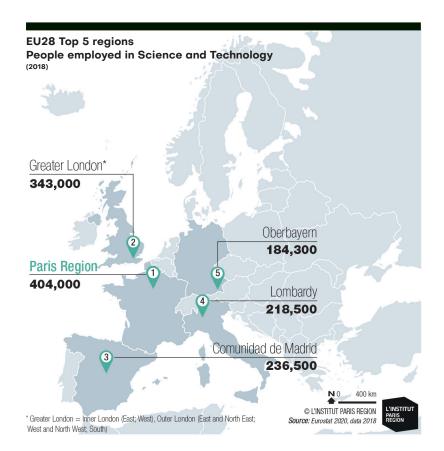
Executives





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.



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 a	nd jobs in Pa	ris 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 management 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.

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

Primary and secondary Education

Nursery from 3 months old Pre-school / Kindergarten 2-3 to 5 years old Primary-school 6 to 10 years old

Secondary-school 11 to 15 years old High-school 16 to 18 years old Diploma Baccalauréat

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 Primary and secondary education (public and private)

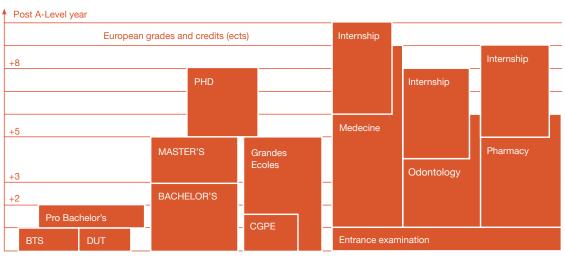
1,327,948 pupils 90.4% in public schools

1,075,279 students 80.7% in public middle and high-schools 3,104,228

primary school pupils and middle and high-school students 04%

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

A-Levels

Highly educated students

704,500

students

41.4%

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

38%

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

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

Fields of study	Total Students	%
Law, Political Science	60,220	15.22
Economics, Administration	48,547	12.27
Letters, Art, Languages, Humanities and Social Sciences	131,597	33.25
Sciences*	77,207	19.51
Sports	7,568	1.91
Subtotal General Fields	325,139	82.15
Health sector	52,847	13.35
University Institute of Technology Fields	17,805	4.50
Grand Total	395,591	100

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

33%
Letters, Art,
Languages, Humanities
and Social Science

20°

Sciences



Gobelins animation school @ Aurélia Blanc - Gobelins

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

119,500 foreign students in Paris Region 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 Region

MBAs and Business Schools

Financial Times Rankings (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 ca 38,117 129,341 29.5 ericas 8,103 22,432 36.1

Airica	30,117	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.

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.

165 International Sections in 17 different languages to Paris Charles-de-Gaulle Maisons-Laffitte Fourqueux **PARIS** Noisy-le-Grand La Celle-Saint-Cloud Boulogne-Billancourt Nogent-sur-Marn Magny-le-Hongre ssy-Saint-Georges Brie-sur-Marne Fontainebleau 3 km to Paris Orly international airport C L'INSTITUT PARIS REGION, 2020 Source: Choose Paris Region

	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				

Educsol, 2020

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.

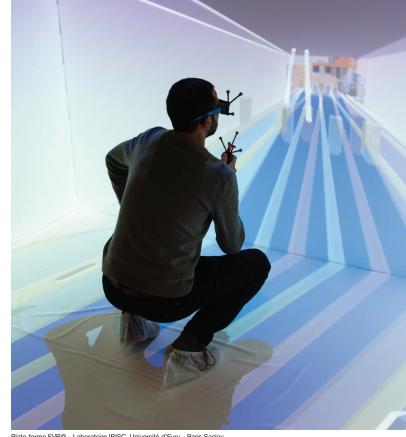


Plate-forme EVR@ - Laboratoire IBISC, Université d'Evry - Paris Saclay

#1 in Europe for R&D

The highest amount of R&D expenditure in Europe

Paris Region R&D expenditure €20.2b

6.6% of EU and 40% of French R&D expenditure 2.86% of Paris Region's GDP

Main fields of R&D:

Automotive industry 18% Pharmaceutical industry 11% IT activities and information services 10.0% Specialized activities, scientific and technical, 7.5% Aerospace 6.8%

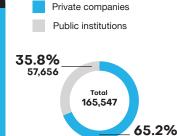


In the Region, more than two-thirds R&D expenses are made by companies

The largest R&D talent pool in Europe

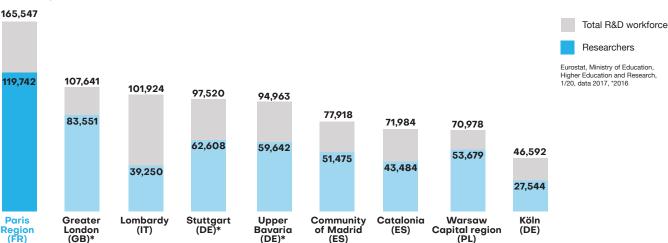
Paris Region R&D workforce 165,547 researchers

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



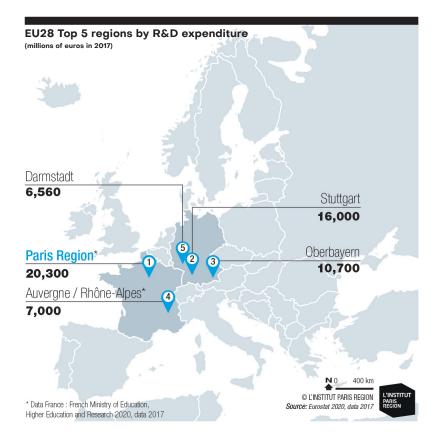
5.6% of EU and 37.5% of French R&D employees 40.5% of the researchers in France Ministry of Education, Higher Education and Research, data 2017

Paris Region, the best place in Europe to source R&D talent









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 Tokyo

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

Internationally recognized technological and scientific knowledge

32 Nobel Prizes

Ecole Normale Superieure, top Nobel producing undergraduate institution in the world in 2016

The two most prestigious awards in mathematics

Fields Medals

Abel Prizes

27,500

students enrolled in doctoral programs, i.e.

37.4[%]

in France

Eurostat, data 2017

99 doctoral schools 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.

8 regional competitiveness clusters make up this dynamic ecosystem.

2,600 projects

4,360 members including: 3.900 companies 584 labs and teaching institutions, ...

€9.2b of total funding



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 €



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 €



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 €



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



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 €

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 fundina:** 2,073 million €



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 €



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.

Share of potentially connected premises at the city level $_{\rm State}$ of the art 1st quarter 2019

FttH deployment in Paris Region

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.

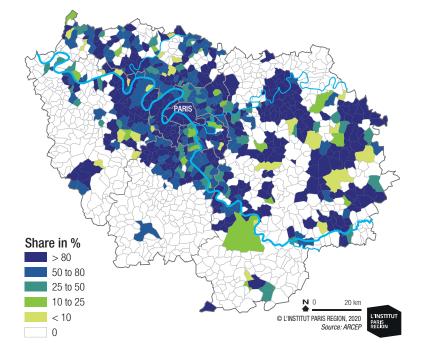
The Paris Region aims to be the first region in Europe to be entirely equipped with fiber-optic cables by 2020/2025.

Reliable telecommunications and networks

4G Mobile telephony

— 4 operators

- 99.8% of the population is covered ARCEP





Re

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 m².

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

Paris Region more affordable than London in occupancy costs

_	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	

Top 15 office space market by occupancy costs (2019)

Global prime office occupany costs, 2019, CBRE

Office stock in major world capitals in million $\ensuremath{\text{m}}^2$

Paris Region			54.2
New York (Manhattan)		40.2	
Dallas/Fort Worth		28.6	
Chicago		26.5	
Houston	2	22.4	
Central London	20	.9	
Munich	20.8	3	
Berlin	19.5		
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



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.

>900

"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 $130,000 \text{ m}^2$ of space for start-up incubators have been created in recent years, including $34,000 \text{ m}^2$ 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, Servcorp, Stop & Work, Techonmap, L'Institut Paris Region © L'Institut Paris Region, Ernst and Young/ULI

The Grand Paris Express, a great opportunity for urban projects

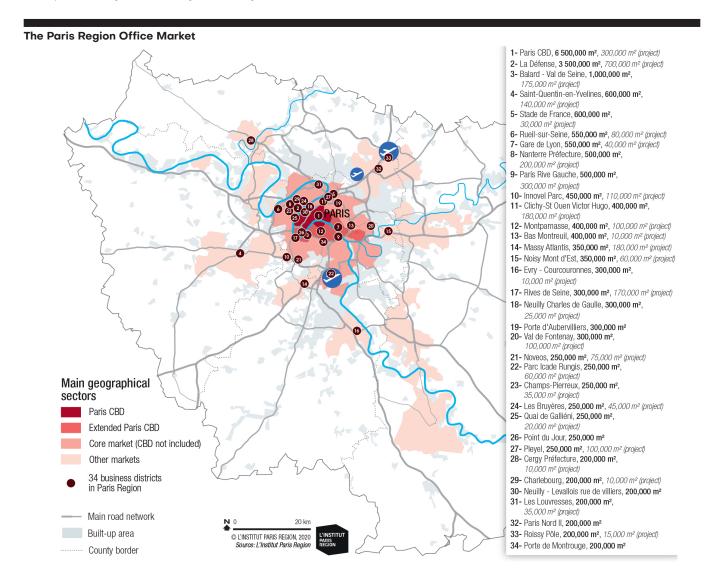
To enhance its attractiveness and competitiveness in our globalized world, the Paris Region is undertaking major infrastructure and urban planning projects, including the Grand Paris project, the largest urban project in Europe providing a new transport network, new residential projects, office districts, 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.





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.



Paris CDG Airport @ Aéroport de Paris - Burlot

Reach 513 million consumers in under 2 hours by plane

Paris Region's high quality infrastructure ensures the seamless flow of people, goods, capital and data.

By plane

Paris Aéroport, 2018, *2019

3 international airports

716,524 aircraft movements

165 airlines

119 countries served from Paris Region

357 destinations served from Paris



12.2M connecting passengers

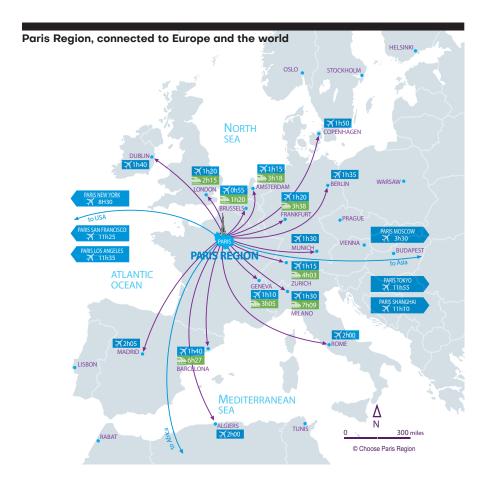
Paris-Charles de Gaulle (CDG) #2 in Europe for passenger traffic 76.1 million passengers 498,175 aircraft movements

Paris-Orly

31.8 million passengers 218,349 aircraft movements

Paris-Le Bourget Europe's leading business airport 100,000 passengers 57,295 aircraft movements

10 airfields and 1 heliport



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

main stations, including

TGV (high-speed train) stations

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 trips	Number of trips / weekday	Evolution 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	

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

Public transport

Total

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

1.550

4,720

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-Moneds: ground 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



1. La Défense

3. Saint-Denis Plevel

4. Le Bourget

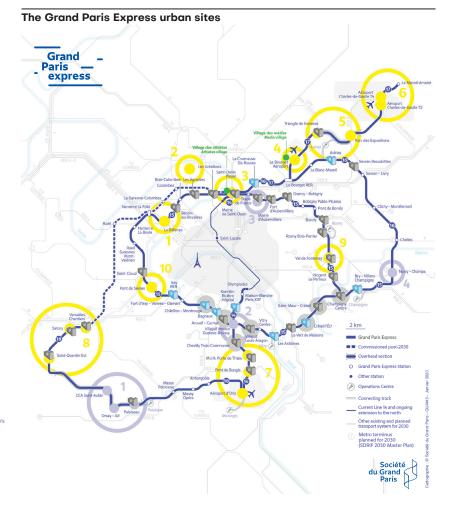
6. Grand Roissy

8. Satory - Saint-Quentin - Versailles

9. Val de Fontenay 10. Front de Seine - Val de Seine Tertiary, digital and cultural center of the west of Ile-de-France



Pre-project studies

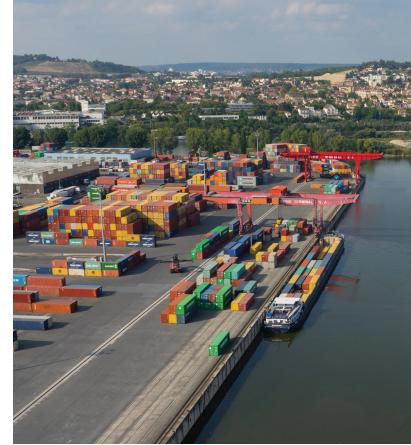




Cost-effective logistics

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



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

Europe's

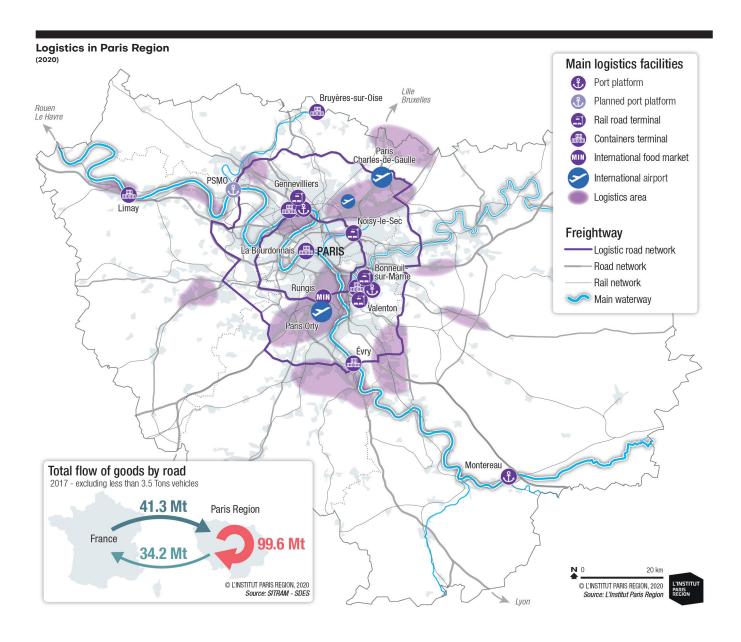
road
network

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

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



Vivatech © Jean-Claude Guilloux. Vivatech

446 trade shows, including

230 professional trade shows

A real know-how in hosting major trade shows

CCI Paris île-de-France, data 2019

The #1 offer of exhibition space in the world

700,000 m²

22 exhibition and conference venues

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

446

trade shows

1,200

conventions

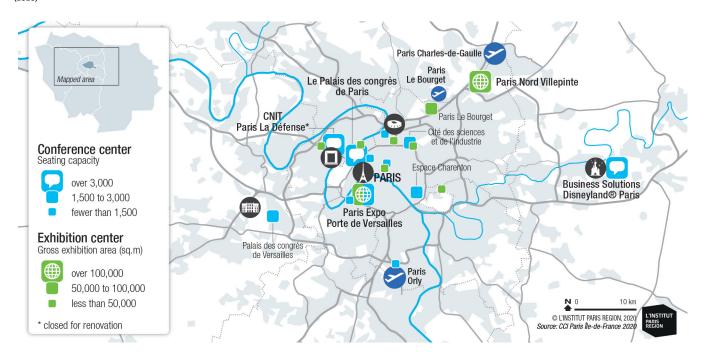
9.4M

visitors

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



Conference and exhibition centers in Paris Region



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

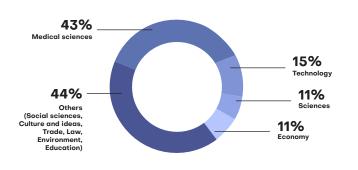
882,400 participants

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

72% flats, 4.1 million

26.3% houses, 1.5 million

Private housing rents in Paris Region				
	Paris	Inner suburbs	Outer suburbs	Paris Region
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

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

A green region

75% green space, forests and water

50% agricultural space 28% wooded areas, natural world

1% water 4 regional nature parks representing 18% of the land area

23% urban space

(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,

IAU/MOS 2017, Insee, IAU ÎdF

energy...)

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

361 theaters
5 opera houses
47 foreign cultural institutes
and centers (FICEP)
65 million visitors in the top 10
cultural sites in Paris

307 cinemas.

1,073 screens

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

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

of the Top 15
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		

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

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

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

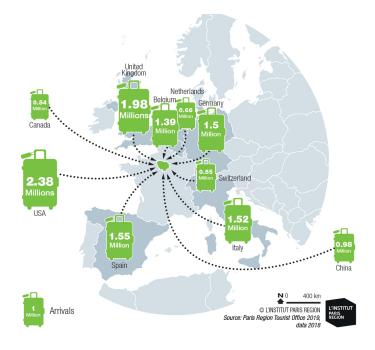
One of the largest hotel facilities in the world

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)

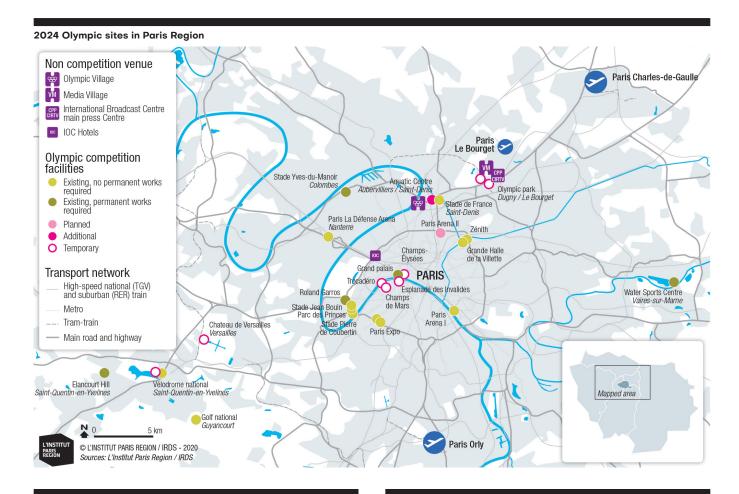
The main international customers in the Paris Region are Americans (4.8%), British (4.0%), Spanish (3.1%), Italians (3.0%) and Germans (3.0%). European customers (including the French) account for 80.6% of tourist stays.





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

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



Sports and leisure activities

(2019)

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

Football (soccer): 267,312 licences

Tennis: 221,713 licenses Judo: 109,996 licenses Golf: 103,415 licenses Riding: 93,036 licenses

INJEP-MERES, Recensement des licences, 2018, RES, Sports Ministry, 2017

Some popular sporting events

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

NatWest 6 Nations championship (rugby): 150,000 spectators Paris Marathon: 57,000 participants, 250,000 spectators GayGames: 105,000

spectators

Major events



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 to km of the city center

Sustainable

55% smaller carbon footprints than London 2012

Paralympic Games August 28th

- Sept. 8th, 2024

Travel

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 Paris2024 media



The world capital for shopping

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...

Westfield Les Quatre Temps-Le CNIT and European shopping destination

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



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

A unique culinary desination

The world's biggest fresh produce market

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

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, rose petal confit from Provins, peppermint from Milly-la-Forêt, poultry from Houdan or Grand Marnier.

Several varieties of fruits and vegetables take their name from their place of production: Argenteuil asparagus, Arpajon beans, Belle de Fontenay potatoes, mushrooms and hams. Montmorency cherries, Pontoise cabbage, Marcoussis strawberries.

The Paris Region is the leading French region for the production of parsley, watercress and radishes. It ranks 2nd for fava beans, 3rd for peas and 4th for beets, lettuce or pumpkins.

An effervescent gastronomy scene

Paris Region is home to an effervescent gastronomy scene: 23,000 restaurants, big names in French cuisine, foreign specialties, Parisian cafes, organic cafes,... there is something for every taste! Guide Michelin

23,000 restaurants



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

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 Vultton Foundation - Architect Fank 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 the 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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