

Paris Region Key Figures















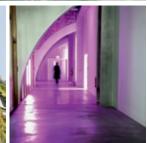






























01-La Défense / Hauts-de-Seine © ARD / Derouault Michel — 0.2-Tramway © Paris Tourist Office - Photographe - Auteur / Alain Pottignon — 05-Abbaye de Royaumont à Asnières-sur-Oise ("Val d'Oise © ARD / Derouault Michel — 06-La Villé de Meaux / Seine et Marne © ARD / Derouault Michel — 07-Bătiment du Genèthon de l'Arth et du Genèthon de l'Arth et

# Editorial

# Our aims in producing this document:

Every year, the Paris Region Economic Development Agency (PREDA), the Paris — Ile-de-France Regional Chamber of Commerce and Industry (CRCI) and the Paris Region Urban Planning & Development Agency (IAU île-de-France) publish the latest key figures for Paris Region, one of the world's leading economic regions.

This document was created drawing on the latest available published data.

Paris Region Key Figures 2009 is a reference document providing you with all the key figures you need when:

- assessing Paris Region's offer within the wider French and European environment
- gathering detailed information for your market research relating to potential investment projects in Paris Region.

We hope that this makes it easy for you to identify the key economic data, at the same time highlighting Paris Region's unique dynamism and diversity.

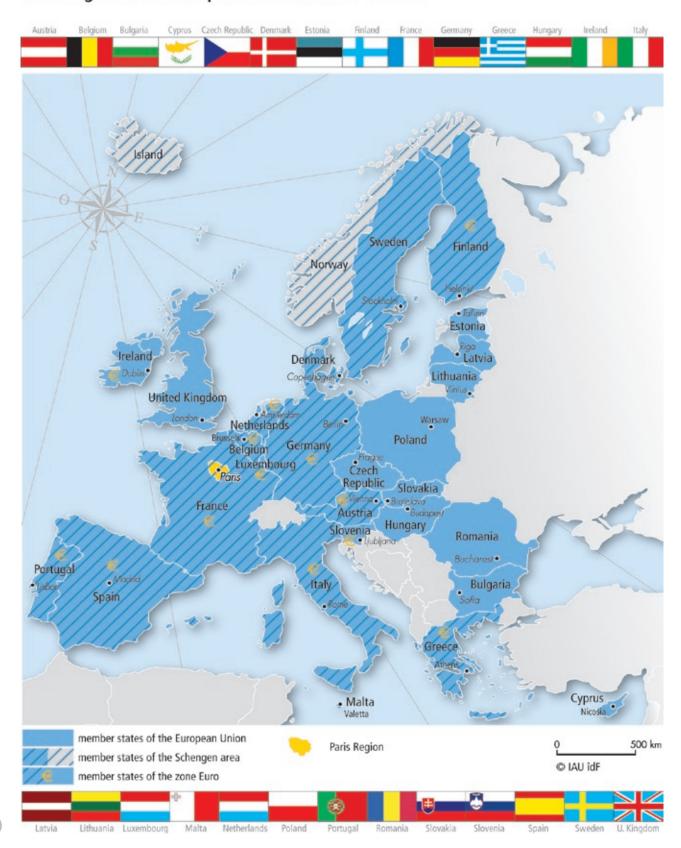
PREDA, the Paris Region Economic Development Agency, also provides a great deal more information on its website **www.paris-region.com** and will be delighted to help you to locate and develop your business in Paris Region.

The CRCI, Paris – Ile de France Regional Chamber of Commerce and Industry, coordinates the region's network of four Chambers of Commerce and Industry, advising and supporting businesses and offering a wide range of products and services relating to start-ups, innovation, economic intelligence, international development and training: www.paris-iledefrance.cci.fr

The IAU île-de-France (Paris Region Urban Planning & Development Agency) monitors trends within Paris Region, and in relation to international developments, on an ongoing basis. Its website offers a range of information including databases and interactive maps: www.iaurif.org

Happy reading!

# Paris Region in the European Union as at 31-12-2008

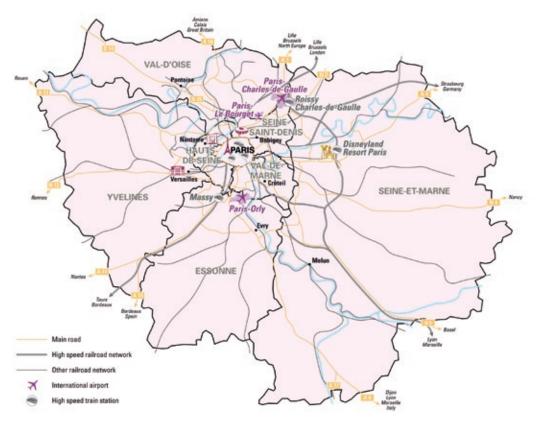


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# PARIS REGION, ONE OF THE LEADING ECONOMIC REGIONS IN THE WORLD



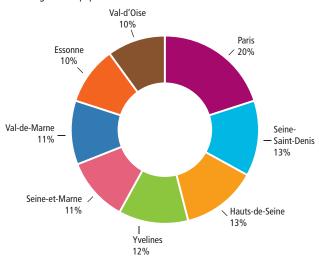
# Paris Region's 10 biggest cities in 2006

Taris Region's To biggest cities in 2000					
City	Population				
Paris	2,181,400				
Boulogne-Billancourt	110,300				
Argenteuil	102,700				
Montreuil	101,600				
Saint-Denis	97,900				
Créteil	89,000				
Nanterre	88,300				
Versailles	87,500				
Courbevoie	84,400				
Vitry-sur-Seine	82,900				

Source: INSEE (French Institute of Statistics), 2006 population census

# Population by département

Paris Region total population: 11.6 million





# PARIS REGION HOLDS A STRONG POSITION IN EUROPE

- 12,012 km², 8 départements, 1,281 municipalities
- 11,577,000 million inhabitants (19% of the French population): France's most populous region
- 5,495,000 jobs
- GDP: €533,560 million in value (29% of national GDP)
- GDP per inhabitant: €46,000
- Unemployment level: 6.5% (3rd quarter 2008)

### EDUCATION, RESEARCH & DEVELOPMENT

- 585,960 students in higher education
- 137,270 jobs in public and private research
- 55,900 jobs in public research, accounting for 35% of the national total
- 81,370 jobs in private research, including 49,260 researchers
- Annual expenditure of €10,345 million in private research
- 9 competitiveness clusters:
  - 3 global clusters: Finance Innovation, Medicen, System@tic
  - 2 international clusters: Cap Digital, Mov'eo
  - 4 national clusters: Advancity, ASTech, Cosmetic Valley, Elastopole

# FOREIGN DIRECT INVESTMENT

- Foreign Direct Investment: the leading region for job creation in France and in the EU in 2007
- 180 projects and 10,400 jobs created by FDI in 2007

#### PRODUCTIVE SYSTEM

- 678,513 companies
- 75,000 new companies created in 2007
- 2nd largest concentration of Fortune 500 headquarters in the world

# TRANSPORT

- Paris Region connected to 547 cities in 135 countries
- 2 international airports
- Europe's fastest rail network
- Europe's 2nd largest inland port with 70 harbours

### CORPORATE EVENTS AND TOURISM

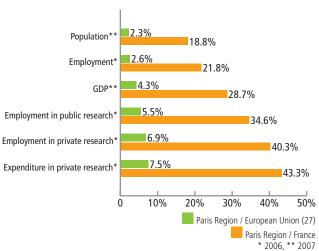
- Largest exhibition capacity in the world (over 600,000 m<sup>2</sup>)
- Paris Region is the world's no.1 tourist destination

#### **QUALITY OF LIFE**

- 4 Regional Natural Parks
- Three quarters of the area is made up of parks, woodland, extensive forests and rural areas



# Paris Region compared to France and to the European Union 27

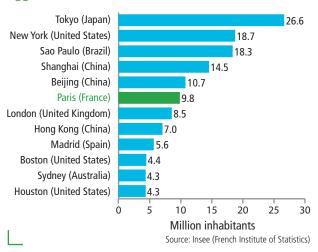




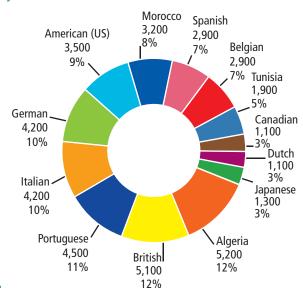
#### PARIS REGION: STEADY DEMOGRAPHIC GROWTH IN FRANCE'S MOST POPULATED REGION

- 11.6 million inhabitants, including 9.8 million in the Paris Region agglomeration
- 19% of the French population and 2.3% of the EU 27 population

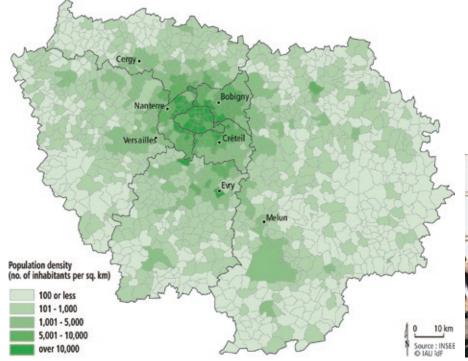
# Paris agglomeration among the main agglomerations of the world in 2005



# International executives working in Paris Region by main nationalities in 1999



Population density in Paris Region as at 01-02-2006

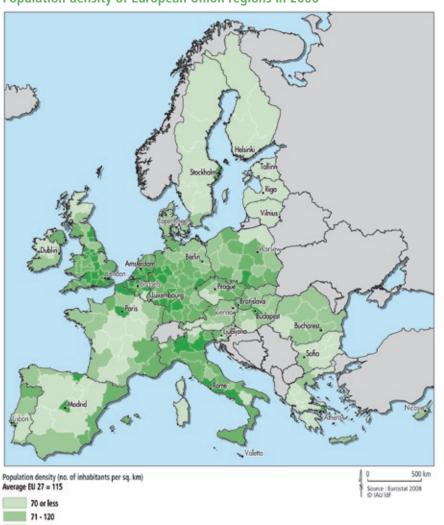




Source: Insee (French Institute of Statistics)

# 

# Population density of European Union regions in 2006\*





### PARIS REGION'S POPULATION

• is still growing: between 1999 and 2007 it increased by 6.8% (an annual average rate of 0.7%, equivalent to the national average growth rate)

non-EU country

- is young: 56.5% of the region's inhabitants are under 40 years old
- is highly cosmopolitan: 12.4% of the population is of non-French nationality

## Population by age group in 2006

\* Austria, Belgium, France, Poland, Spain: 2005

(as %)

	0-19	20-39	40-59	60-74	75 and
					over
Paris Region	26.0	30.5	27.2	10.3	6.0
France	24.9	26.4	27.6	12.8	8.3

Source: Insee (French Institute of Statistics), population estimates

- A steadily growing population
- A young and cosmopolitan population
- One of the world's major agglomerations

# Employment and salaries

6.0

3rd quarter 2006

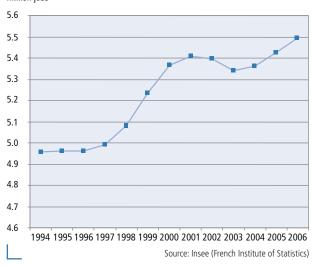
Paris Region

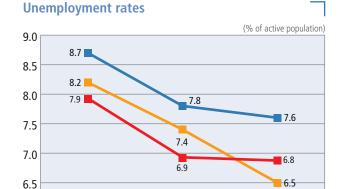
### EMPLOYMENT

- Employment in the region grew by 10.7% between 1996 and 2006
- Annual regional employment grew by 1.4% in 2006, higher than the national average (1.2%)
- 61.4% of Paris Region's population is economically active (55.2% in other French regions)
- Paris Region accounts for 37% of France's executive workforce

# **Employment in Paris Region from 1994 to 2006**







Metropolitan France Source: Insee (French Institute of Statistics), local unemployment rates and Eurostat

3rd quarter 2007

### Population in employment in 2007

(as %)

3rd quarter 2008

Europe (27)

	Paris Region	Rest of France
Under 30	51.9	52.8
30 to 49	90.2	89.1
50 and over	39.7	30.8

Source: Insee (French Institute of Statistics), continuous employment survey

# Structure of Paris Region's economically active population in 2007

Structure of Paris Region's economic	carry active popula			
	Population	Change	Structur	re (as %)
		2007/2006 (as %)	Paris Region	Other French regions
<b>Employed population</b>	5,178, 000	2.8	100.0	100.0
- up to 29 years old	1,069,000	5.5	20.6	19.8
- 30 to 49	2,840,000	1.7	54.8	54.7
- 50 and over	1,269,000	3.1	24.5	25.5
Socio-economic groups, incl.:				
- managers, higher professional workers	1,473,000	3.9	28.4	12.4
- intermediate professional workers	1,261,000	-0.9	24.4	23.3
- non-manual workers	1,474,000	5.4	28.5	30.1
- manual workers	700,000	0.7	13.5	25.1
Activity sectors, incl.:				
- manufacturing	605,000	0.3	11.7	16.4
- construction	258,000	5.7	5.0	6.9
- services	4.283.000	3.0	82.7	72.4

# Employment and salaries



### SALARIES

# Average annual gross salary in 2003 and 2006

(in euros)

	2003	2006	Growth 2006/2003
Managers, higher professional workers	60,211	65,884	9.42%
Intermediate professional workers	31,272	33,759	7.95%
Non-manual workers	21,437	22,922	6.93%
Manual workers	21,843	23,499	7.58%
Average Paris Region	35,020	38,119	8.85%
Average France	27,787	30,137	8.46%

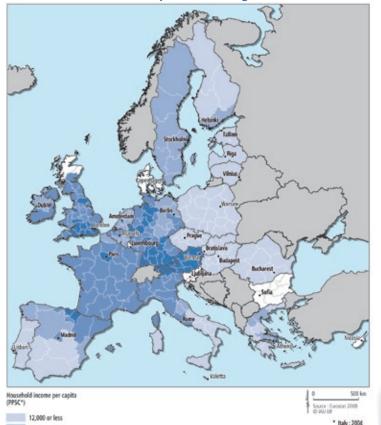
# Average hours worked weekly by employment category in 2003 and 2006

Source: INSEE (French Institute of Statistics), DADS

	Paris I	Region	Other French regions		
	2003	2007	2003	2007	
Craftsmen, storekeepers and business managers	52.4	55.5	54.3	54.9	
Managers, higher professional workers	43.1	44.3	43.5	43.9	
Intermediate professional workers	38.9	39.0	38.8	39.4	
Non-manual workers	38.5	38.4	38.1	38.2	
Manual workers	37.6	37.8	37.8	37.9	
Active population average	40.4	41.2	40.8	41.0	

# Household income in European Union regions in 2005\*

Source: Insee (French Institute of Statistics), continuous employment survey



non-EU country



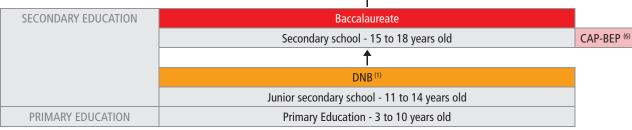
- Employment has been growing steadily
- A highly active population
- Employment market is not overheating



#### THE FRENCH EDUCATION SYSTEM

### The French education system - an overview

Level afte	er baccalaureate	UNIVERSITY (2)		NON UNIVERSITA	ARY EDUCATION	
	+ 8 years	Doctorate				
EDUCATION	+ 5 years	Master		Grandes Ecoles (5)	Engineering	Business
UCA			IUFM (4)		schools	schools
	+ 3 years	Licence				
HIGHER	+ 2 years		BTS <sup>(3)</sup>	Preparatory classes for <i>Grandes Ecoles</i> (5)		



<sup>(1)</sup> Diplôme National du Brevet (DNB) is a general education certificate awarded at the conclusion of junior secondary level education (in a collège).

(2) The degrees awarded in the French higher education system are based on the European model of Licence, Master and Doctorate.

(3) BTS: Technical sections. / (4) IUFM: Instituts Universitaires de Formation des Maîtres (teacher training colleges).

# PARIS REGION EDUCATION LEVEL

# Educational qualification achieved by age and gender from baccalaureate in Paris Region in 2004

Working population Age 35-44 Age 25-34 Age 45-54 Women Men Women Women Men Men **Baccalaureate** 20.1 13.6 18.3 13.9 16.4 12.1 Baccalaureate + 2 years 15.6 20.1 13.0 14.8 9.9 12.9 36.1 23.0 20.4 20.5 17.7 Baccalaureate + 3 years and more 30.3 Total % of working population 62.2 76.2 49.6 53.5 42.5 44.6 having the Baccalaureate

Source: INSEE (French Institute of Statistics), continuous employment survey 2004

(as %)

#### SECONDARY EDUCATION

1,069,000 students in 1,870 secondary schools.

#### INTERNATIONAL SCHOOLS

- 11 foreign national intitutions: American, English, German, Italian, Japanese, Spanish.
- 22 multicultural institutions: American, Arabic, Danish, Dutch, English, German, Italian, Japanese, Norvegian, Polish, Portuguese, Spanish and Swedish.

### HIGHER EDUCATION

- Paris Region is France's leading centre for university education, with a total of 586,000 students in 2007-2008.
- 72,732 international students attending Paris Region's public universities, representing 21.4% of the total student population.

<sup>(</sup>a) The Grandes Écoles are uniquely French institutions. They are extremely selective and offer education of a very high standard. (a) CAP/ BEP: secondary school professional diploma. Source: EduFrance 2009, PREDA analysis



## Number of students in higher education by type of institution for the 2007-2008 academic year

	Universities	IUFM (2)	BTS (1)	Preparatory classes for <i>Grandes Écoles</i>	Engineering schools	Schools of Business, Commerce and Accounting	Other higher educational institutions <sup>(3)</sup>	TOTAL
Paris Region	338,523	15,135	41,659	24,829	25,149	33,514	109,613	585,962
Paris Region / France	25.20%	22.40%	18.60%	32.30%	23.10%	35.00%	34.80%	26.70%

(1) BTS: Technical sections. / (2) IUFM: Instituts Universitaires de Formation des Maîtres (teacher training colleges).

#### WORLD-RANKING HIGHER EDUCATION INSTITUTIONS

- Paris Region has 17 universities located on 22 sites across the region. Many are world-renowned, including Paris I Panthéon - Sorbonne, Paris V René Descartes\*. Paris VI Pierre & Marie Curie\* and Paris XI Sud\*, to name iust a few.
- 53 public and private Grandes Écoles, four of which are ranked in the Shanghai Academic Ranking of World Universities.
- Most renowned business schools: École Supérieure des Sciences Économiques et Commerciales (ESSEC), ESCP-EAE, Groupe Hautes Études Commerciales (HEC), INSEAD.

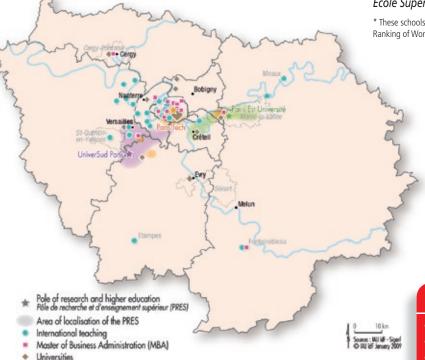
The French government has established academic clusters – *Pôles* de Recherche et d'Enseignement Supérieur, or PRES for short bringing together universities, Grandes Écoles and research centres.

### Paris Region currently has three major PRES clusters:

- «Paris Est Université»: École des Ponts, Université de Marnela-Vallée, Université Paris XII Val-de-Marne, École Supérieure d'Ingénieurs en Électronique et Électrotechnique (ESIEE) and Laboratoire Central des Ponts et Chaussées:
- «Paris Tech»: 10 engineering faculties, including École Nationale des Ponts et Chaussées, École Nationale Supérieure de Chimie de Paris, École Nationale Supérieure des Mines de Paris\*, École Nationale Supérieure d'Arts et Métiers, École Polytechnique\*, École Supérieure de Physique et de Chimie Industrielles de la Ville de Paris\*, and Agro Paris Tech;
- «UniverSud Paris»: comprising Université Paris XI, Université Versailles Saint-Quentin, ENS Cachan\*, École Centrale Paris and École Supérieure d'Électricité.

\* These schools and universities are listed in the world-renowned Shanghai Academic Ranking of World Universities.

# **Education with international vocation in Paris Region**





#### Region Paris

- A high-quality, multi-specialist educational system
- Strong international student presence
- A highly-qualified workforce in Paris Region

<sup>(</sup>B) Technology universities, accounting schools, top teacher training colleges, private universities, legal and administrative schools, higher educational art and culture colleges, paramedical and social work schools. Source: Ministry of Higher Education and Research



#### NO.1 IN EUROPE FOR SCIENCE AND TECHNOLOGY

 Paris Region is Europe's no.1 region in terms of R&D capability with public and private R&D expenditure totalling €15.5 billion and 137,272 people working in research, including 75,846 researchers

#### • Public research

- total expenditure: €5.2 billion

- 55,900 employees (47% are researchers)

#### • Private research

- total expenditure: €10.3 billion

- 81,372 employees (61% are researchers)

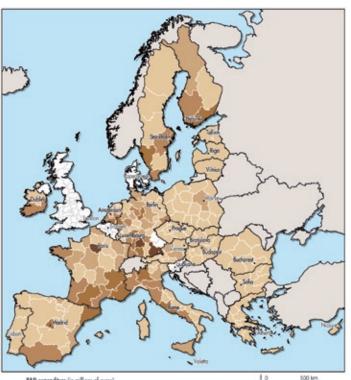
### • Main private research fields in Paris Region:

- automotive industry

- pharmaceutical industry

- aircraft / aerospace industry

# European research and development expenditure by region in 2005\*



| 2 | 500 km | Total EU 27 = 202,018 | Starce: Exemble 2008 | 1 - 500 km | 1 - 500

\* Austria France : 2004

non-EU country

## A vigourous R&D activity

	Paris Region	France	European Union (27)
Population (million inhabitants)	11.6	18.8%	2.3%
Jobs in public and private sector research	137,272	37.7%	6.2%
Expenditure in public and private sector research (€ billion)	15.5	40.9%	7.7%

Source: Ministry of higher education and research, and Eurostat

# Top 5 EU regions for R&D expenditure of EU total R&D expenditure in 2003

9% 8% 7% 6% 5% 4% 3% 2% 1%

Stuttgart

(DE)

Denmark

(DK)

# Private research and development (R&D) capability in Paris Region in 2005

Oberbayern

(DE)

0%

Paris Region

(as %)

Darmstadt

(DE) Source: Eurostat

	3		(45 /0)
	Number of people in R&D	Resear- chers	R&D expendi- ture
Automotive industry	25.5	18.9	23.0
Pharmaceuticals <sup>(1)</sup>	11.5	9.9	13.9
Radio, TV and communication equipment <sup>(2)</sup>	11.7	15.6	11.5
Aerospace	6.0	5.7	9.3
IT / Computer services	8.4	11.9	6.5
Chemicals	5.0	3.1	5.4
Sub Total	68.1	65.1	69.6
Other	31.9	34.9	30.4
Total	100.0	100.0	100.0

Sum of entries may not match total due to rounding

(1) Including the manufacturing of active principles / (2) Including electronic components

Source: Ministry of higher education and research - DEP B3

er 5 000



#### PARIS REGION COMPETITIVENESS CLUSTERS

In 2005, the French government launched its competitiveness cluster strategy with the aim of bringing together businesses, research centres and training bodies to unlock synergies and stimulate the emergence of collaborative, and, above all, innovative projects, in the face of increased global competition. These competitiveness clusters will strengthen Paris Region's competitive position on the world stage, notably by encouraging research and innovation.

Cluster name	Specialist field	Number of	Number of	Number of	Number	Public
	opedianse nera	SME	major	laboratory	of state	financing
		members	corporation	or higher education	financed	(€ million)
			members	institution	projects	
				members		
Global competitiveness clusters						
Finance innovation	Banks and investment companies, insurance companies, investment management companies, services to the finance sector	47	105	24	9	7.0
Medicen Paris Region	Advanced technology for healthcare and new therapies	93	12	25	19	43.3
System@tic Paris Region	Automotive & transport, free & open source software, security & defence, systems design and development tools, Telecom	183	107	79	117	235.4
Globally-oriented competitiveness clusters						
Cap Digital Paris Region	ITC, digital content technologies	230	20	30	55	25.2
Mov'eo*	Automotive sector, public transport, road safety and environment	47	51	41	21	11.9
National competitiveness clusters						
Advancity	Sustainable urban development, housing & construction and mobility, Eco technologies	46	9	19	10	10.1
ASTech Paris Region	Business aviation, space transportation, propulsion systems and equipment	49	15	23	10	21.6
Cosmetic valley	Perfumes and cosmetics	131	33	17	12	29.5
Elastopole*	Rubber and polymers	40	10	12	-	-

<sup>\* 2007</sup> data / Source: Finance innovation, Medicen, System@atic, Advancity, Astech, Cosmetic Valley (2008 data), www.competitivite.gouv.fr (2007 data)



- Europe's leading R&D region
  - Europe's no.1 region for R&D expenditure
  - Europe's no.1 region for R&D personnel (full-time equivalent)
- 9 clusters
- More than 120 public research centres

# The Paris Region network of Chambers of Commerce and Industry











A network of Chambers of Commerce and Industry (CCIs) operates throughout Paris Region, helping businesses grow and supporting continuous employee training and development.

The CCIs provide a wide array of services to business, including a tailored support programme for SMEs looking to develop exports and an international training offer.

The CCIs collaborate closely with France's 114 international chambers of commerce and industry (CCIFEs) which have a 900-strong workforce and a presence in 78 countries.

If you're planning to locate to Paris Region, simply contact the Chamber of Commerce and Industry in the relevant département:

For Essonne, Chambre de Commerce et d'Industrie de l'Essonne: www.essonne.cci.fr  For Paris and its immediate suburbs, Chambre de Commerce et d'Industrie de Paris (CCIP): www.ccip.fr/international

- CCIP Paris: www.ccip75.fr

- CCIP Hauts-de-Seine: www.ccip92.fr

- CCIP Seine-Saint-Denis: www.ccip93.fr

- CCIP Val-de-Marne: www.ccip94.fr

- For Seine-et-Marne, Chambre de Commerce et d'Industrie de Seine-et-Marne: www.seineetmarne.cci.fr
- For Versailles Val-d'Oise and Yvelines, Chambre de Commerce et d'Industrie de Versailles Vald'Oise / Yvelines, comprising a head office in Yvelines and an office in Val-d'Oise:
   www.versailles.cci.fr

To obtain regional information, please contact the regional CCI, the Paris – Ile-de-France Regional Chamber of Commerce and Industry (CRCI):

 Chambre Régionale de Commerce et d'Industrie Paris – Ile-de-France: www.paris-iledefrance.cci.fr





# The Paris Region Network of Chambers of Commerce and Industry (CCIs) support businesses export activities

**EVERY YEAR** 

# MORE THAN 250,000

SERVICES ARE PROVIDED TO BUSINESSES:

### UN ÉVÉNEMENT DES CCI



- consultancy and ongoing support for specific projects provided to 2,500 exporting businesses:
- 60 trade delegations and exhibitions benefiting more than 1,000 companies;
- 250 business meetings and seminars in more than 50 countries:
- events dedicated to specific markets and receptions for international delegations involving more than 7,500 companies:
- all the international formalities.





Coordination of the Enterprise Europe Network in Paris Region (CCIP), which is responsible for organising technology partnerships between companies and European research centres and for channelling information about European opportunities, especially the 7th Framework Programme for Research and Technological Development (with funding of 50 billion for the 2007-2013 period).



educational institutions run by the CCIs: HEC, ESSEC, ESCP-EAP, Négocia-Advancia.

### 6 international representative offices

serving the needs of business - in Algiers, Boston, Moscow, Mumbai, Beijing and Shanghai.

# A permanent delegation

representing the Paris - Ile-de-France CCIS at the European Commission in Brussels.

# MORE THAN STAFF WORKING

on international issues in the CCIs' departments and educational institutions.



# Productive system

#### **HIGHLIGHTS**

- Paris Region: a dynamic productive system and a competitive business environment
  - GDP: the leading region in France and no.1 in Europe\* with €533,564 million
  - GDP per inhabitant: €45,980
  - 678,513 companies, 759,181 businesses 22% of the French total
  - 5,495,000 jobs, of which 5,159,000 are salaried (94%)

• Paris Region offers a broad industrial base and a diversified tertiary sector

# Analysis of Paris Region workspace by sector in 2006

Sector	Services	Industry	Construction	Agriculture
% of total	82.7	11.7	5.0	0.6

Source: Insee (French Institute of Statistics)

### Value added, private sector businesses and employment in Paris Region in 2007

	Value add	ded sector	Private secto	or businesses	Private sector salaried jobs	
Sector	€ million	as %	Number	as %	Number	as %
Agriculture, forestry, fishing	612	1.0	97	0.0	782	0.0
Food and agricultural product processing	3,261	0.7	4,959	1.4	48,450	1.2
Consumer goods	13,540	2.8	9,035	2.6	159,598	3.8
Automotive industry	2,942	0.6	187	0.1	52,834	1.3
Capital goods	9,266	1.9	3,928	1.1	130,713	3.1
Intermediate goods	8,829	1.8	5,163	1.5	104,398	2.5
Energy	9,043	1.9	244	0.1	18,610	0.4
Construction	19,483	4.1	30,308	8.7	256,857	6.2
Wholesaling / Retailing	44,665	9.3	72,392	20.9	713,646	17.2
Transport	22,777	4.8	9,661	2.8	218,503	5.3
Finance and real estate / property	111,916	23.4	65,599	18.9	413,401	10.0
Business-to-Business services	116,293	24.4	61,136	17.6	1,186,984	28.6
Business-to-Consumer services	39,058	8.2	51,170	14.8	424,809	10.2
Education, healthcare, social welfare, civil service	76,100	16.0	32,685	9.4	421,341	10.2
Unknown activity	-	-	78	0.0	142	0.0
Total value added	477,785	100.0	346,642	100.0	4,151,068	100.0

Source: INSEE (French Institute of Statistics), regional accounts, 2007 data provisional - Garp 2007

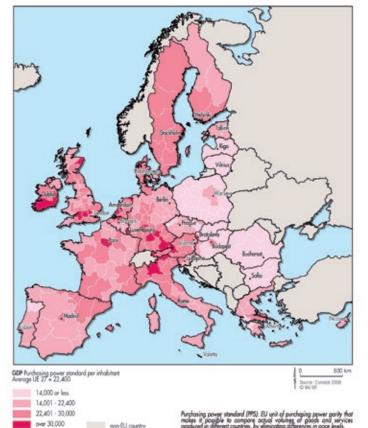
### Businesses in Paris Region in 2006 – analysis by size

0 employees	1 to 9 employees	10 to 19 employees	20 to 99 employees	100+ employees	Total
57.6%	34.1%	4.0%	3.5%	0.9%	100.0%

<sup>\*</sup>In terms of purchasing power standards (PPS)

# Productive system (San Productive system)

# **GDP of European Union regions in 2005**



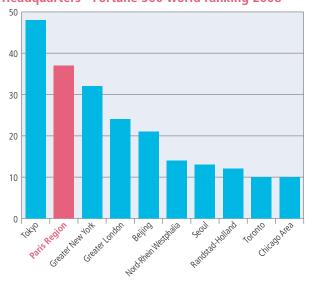
# The biggest private employers in Paris Region in 2006

Company	Regional workforce
Post Office	60,100
Société Air France	50,900
SNCF	46,000
RATP	44,000
France Telecom	36,900
PSA Peugeot Citroën Automobiles	30,900
EDF	24,400
Renault SAS	24,300
BNP Paribas	23,700
Société Générale	23,600
Carrefour Hypermarchés	21,800
Crédit Lyonnais	17,400
Disneyland Resort Paris	12,900
Axa France	12,100
Auchan France	10,600
Monoprix	9,800

Source: INSEE (French Institute of Statistics), CLAP (Local knowledge of the production system)

 Paris Region: 2nd largest concentration of Fortune 500 Headquarters in the world: 37 Fortune 500 companies

## Headquarters - Fortune 500 world ranking 2008



Source: Fortune Magazine «Global 500 companies» - 21 July 2008

# Headquarters of the 2008 Fortune global 500 ranking corporations in Europe by metropolitan area







### A REGION THAT MEANS BUSINESS: 75,000 NEW COMPANIES CREATED IN 2007

New business start-ups in ITS<sup>(1)</sup> in 2007

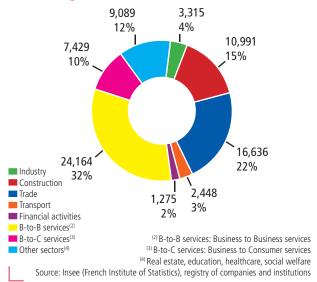
	Total		Business sector							
	number of new ventures	Industry	Construc- tion	Trade	Transport	Financial activities	B to B services <sup>(2)</sup>	B to C services <sup>(3)</sup>	Other sectors <sup>(4)</sup>	Number of ventures as at 01- 01-2007
Paris Region	75,347	3,315	10,991	16,636	2,448	1,275	24,164	7,429	9,089	678,513
Paris Region / Fran	ce 25%	19%	21%	22%	33%	26%	37%	18%	21%	24%

(1) ITS: Industry, Trade, Services (excluding finance) / (2) B-to-B services: Business to Business services (3) B-to-C services: Business to Consumer services / (4) Real estate, education, healthcare, social welfare Source: INSEE (French Institute of Statistics), registry of companies and institutions

# Growth of business start-ups in Paris Region from 1997 to 2007



# New distribution of start-ups by business sector in Paris Region in 2007



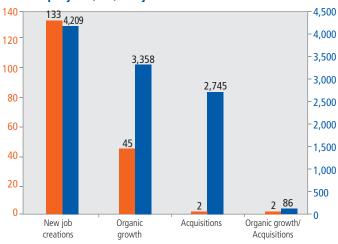
- A dynamic region for business creations
- A productive system based on services
- 2<sup>nd</sup> largest concentration of Fortune 500 headquarters in the world



#### A WELCOMING DESTINATION FOR FOREIGN INVESTMENT

- Europe's no.1 destination for job creation
- 10,398 jobs created by foreign investment in 2007
- 849 investment projects launched since 2003, representing 36,977 jobs

# Breakdown of projects by type of investment in 2007 182 projects, 10,398 jobs

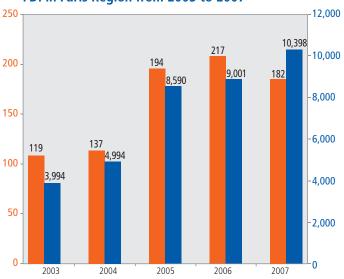


Source: AFII (Invest in France Agency) - PREDA

Source: AFII (Invest in France Agency) - PREDA

■Projects ■ Jobs

# FDI in Paris Region from 2003 to 2007

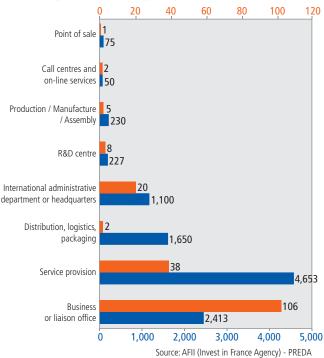


# Main countries of origin of FDI in Paris Region in 2007

Country	Proj	ects	Jobs		
	Number	%	Number	%	
United States	56	31	2,789	21	
United Kingdom	32	18	1,126	11	
Germany	23	13	657	6	
Japan	11	6	357	3	
Netherlands	10	5	2,589	25	
Sweden	8	4	1,355	13	
Austria	5	3	70	1	
Spain	5	3	220	2	
Hong Kong	5	3	435	4	

Source: AFII (Invest in France Agency) - PREDA

# FDI and job creations by project sector in 2007



- A highly attractive region for foreign investment and Europe's no.1 region for job creation
- FDI projects originate mainly from the USA, the UK and Germany

# Transport

#### INTERNATIONAL MOBILITY

Paris Region connected to the world with an outstanding transport network

- Connections from Paris to 547 cities in 135 countries
- 2 international airports: 86.3 million passengers in 2007
  - Paris Charles-de-Gaulle: continental Europe's no.1 airport, with 59.9 million passengers
  - Paris Orly: 26.4 million passengers
- 11 business airports, including Paris - Le Bourget, Europe's leading business airport, with 66,900 movements every year
- 1 heliport
- International freight: the Fedex hub for the EMEA region (Europe, Middle East and Africa) is located at Paris - Charles-de-Gaulle airport.

Paris Region is connected to the world through its international airports and the quality of its TGV (high-speed rail) and intercity network



### **River ports and airports in Paris Region**



- Paris Region's TGV (high-speed rail) services place it right at the heart of Europe:
  - Gare de Lyon: TGV to South of France and Italy
- Gare de l'Est: TGV East to Frankfurt, Stuttgart or Munich and to Switzerland
- Gare du Nord: Thalys to Brussels and Eurostar to London
- **Port of Paris Authority:** 22 million tonnes of goods transported every year
  - Europe's 2nd largest inland port with 70 harbours
  - 10 multimodal platforms (including the port of Gennevilliers, the second largest in Europe)
- Europe's no.1 motorway hub with 800 km of motorways linking it to other parts of France and Europe.



# Further major projects will underpin Paris Region's unique position as a transport hub, including:

- Since 2007 the extension of the LGV Est Européenne high-speed rail link which has connected Paris to the centre of the main cities in Eastern France.
- The CDG Express rail link connecting Paris Gare de l'Est and Paris - Charles-de-Gaulle airport – a fast, regular service (20 minute journey; departures every 15 minutes) meeting the needs of air travellers (on-board baggage storage facilities).

#### REGIONAL MOBILITY

### An efficient and diversified local transport system

- A high-density rail network
  - 1,600 km of lines, 88% of them electrified
  - 100 km of high-speed rail lines
  - some 2.4 million passengers every day
  - 5,000 trains travelling daily on the 3,900 km Paris Region network
  - 390 stations
  - 14 Metro lines
  - 5 RER (Réseau Express Régional Regional Express Train lines)
- 2,100 km of main roads and motorways
- 15,100 taxis
- 1,700 km of cycle lanes
- Velib initiative: system of self-service bicycles (20,600 bicycles and 1,451 stations)

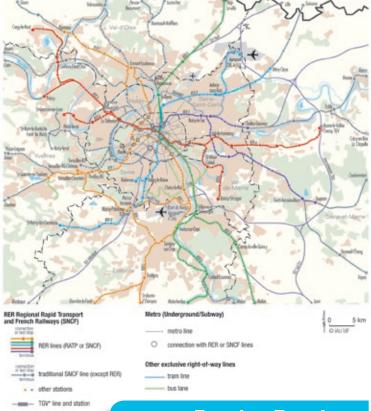


## International airport traffic in 2007

	2007	Growth 2007/2006 (as %)
Total passengers	86,300,000	4.7
Paris - Orly	26,400,000	3.2
Paris - Charles-de-Gaulle	59,900,000	5.4
Movements	776,801	1.9
Paris - Orly	232,991	1.7
Paris - Charles-de-Gaulle	543,810	2.0
Freight and post (in tonnes)	2,410,000	7.5
Paris - Orly	110,000	-0.2
Paris - Charles-de-Gaulle	2,300,000	7.8

Source: ADP

### Public transport network in Paris Region in 2008



- A uniquely dense network of passenger and freight transport
- Europe's leading air-transport hub
- One of the world's most advanced and sophisticated rail systems
- Outstanding road, rail and waterway links
- An efficient and diversified local transport system

# ◆Real estate

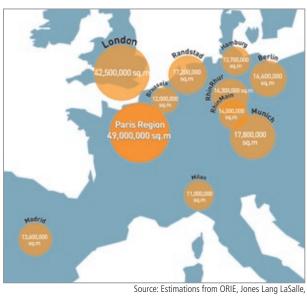
#### A DYNAMIC AND DIVERSIFIED REAL ESTATE OFFERING

### The European leader in office space: high-performance, competitive sites

- Paris Region boasts Europe's leading commercial real estate offering, ahead of London in the office space market, with:
  - 49 million m<sup>2</sup> (524 million sq.ft.) of office space
  - 30 million m<sup>2</sup> (321 million sq.ft.) of business space
  - 29 million m<sup>2</sup> (310 million sq.ft.) of warehouse space
  - 3 million m<sup>2</sup> (32 million sq.ft.) of potential office space

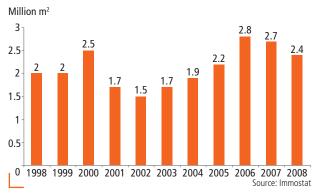
# Paris Region real estate still attractive in 2008

- Europe's no.2 real estate investment market
- €8.4 billion invested (41% by international investors)
- €13.9 billion invested annually on average over the last five years

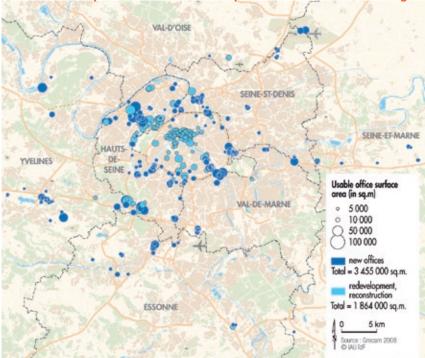


data handled by PREDA, IAU îdF - 2007 (London: within the M25)

# Office take-up in Paris Region



### 5,000 m2 + of speculative office developments delivered in Paris Region from 2002 to 2007





# Real estate

### **ECONOMIC DEVELOPMENT AREAS AND LOGISTICS**

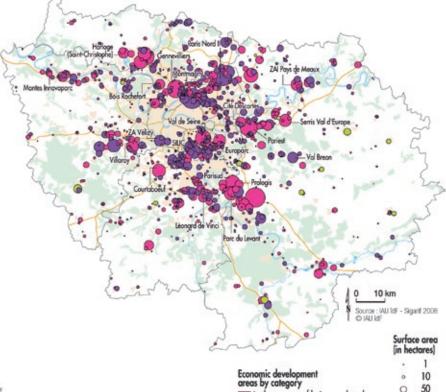
### • Economic Development Areas (ZAE)

- More than 330 ZAEs, or Economic Development Areas (covering a total of more than 12,000 hectares in all) are currently offering real estate for development.
- This real estate offer, totalling some 2,000 hectares, is located mainly on the outskirts of the urban zone and spread across a large number of locations.

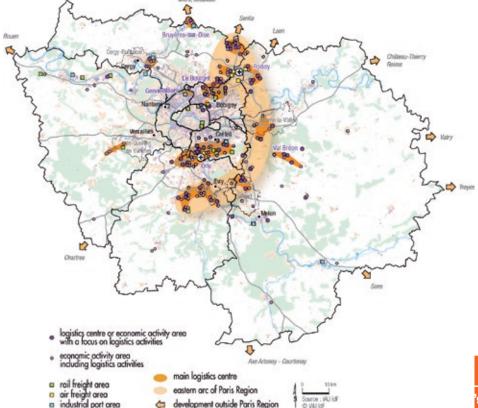
Three-quarters of these Economic Development Areas offer plots of 5 hectares or less; however, some areas can still offer larger areas suitable for accommodating businesses requiring large-scale facilities.



**Economic development areas in 2008** 



# Logistics sites and centres in 2006



### • Logistics: Paris Region - a European logistics center

in the process of being marketed

non offering available areas

in short-term project

- The warehouse offering for logistics businesses has grown to 29 million m<sup>2</sup> (312 million sq.ft), of which some 1 million m<sup>2</sup> (11 million sq.ft.) is currently available.
- Warehouse rental costs in Paris Region are among the most attractive in Europe Prime rentals are under €55/m<sup>2</sup>/year, excluding tax and service charges, in Paris Region, as compared with €68 in Brussels, €70 in Frankfurt, €78 in Madrid, €85 in Amsterdam and €189 in London.

# Paris Region

's office space leader

- A dynamic region for real-estate investment
- A prime European logistics hub

100

500

# Corporate events and tourism

# A HUB FOR BUSINESS MEETINGS AND CORPORATE EVENTS

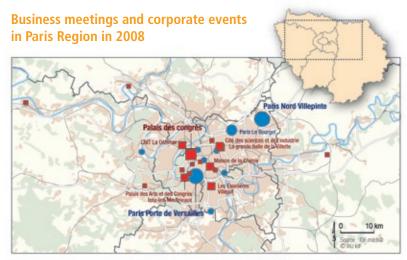
- The largest exhibition capacity in the world (over 600,000 m²)
- Europe's leading city for trade fairs and exhibitions
- The world's no.1 destination for business meetings
- 15 major exhibition and convention centres

# Trade events open to the general public

Paris Region hosts a huge number of trade events open to the public.

In 2007, business tourism accounted for 40% of hotel overnight stays in Paris Region and 43% of those in Paris itself.

More than 3,000 trade events took place in Paris Region in 2006.



#### Conference centre

No. of seated places

fewer than 1,500 places

# between 1,500 and 3,000 places over 3,000 places

#### **Exhibition centre**

Gross exhibition area

less than 50,000 sq.m
 between 50,000 and 100,000 sq.m
 over 100,000 sq.m

## Business meetings and corporate events in Paris Region by venue category in 2007

Venue	Participants <sup>(1)</sup>	Market share (as %)	Number of business meetings and corporate events (2)	Market share (as %)
Convention and exhibition centres	403,284	76	298	34
Scientific facilities and institutions	52,961	10	267	32
Hotels with meeting facilities	30,748	6	108	13
Meeting facilities	21,198	4	84	10
Museums - event facilities	9,041	2	46	5
Others	12,655	2	55	6
Total	529,887	100	858	100

<sup>(1)</sup> For the 683 business meetings and corporate events where the number of participants is known / (2) Of a total of 858 business meetings and events

Source: Paris Convention and Visitors Bureau

# Top 10 trade and public events in 2007

Name	Venue	Visitors
Mondial* de l'automobile	Paris Expo Porte de Versailles	1,339,126
Salon de l'Agriculture - International Agricultural Show	Paris Expo Porte de Versailles	699,336
Paris Trade Fair	Paris Expo Porte de Versailles	667,124
Paris Air Show Le Bourget	Paris Le Bourget	400,000
Salon nautique de Paris - Nautic	Paris Expo Porte de Versailles	270,892
SIAL* - The Global Food Marketplace	Paris Nord-Villepinte	210,638
Intermat*	Paris Nord-Villepinte	209,032
Salon du Livre	Paris Expo Porte de Versailles	169,901
Salon du Cheval - The Paris Horse Show	Paris Expo Porte de Versailles	152,083
Maison & Objet Paris	Paris Nord-Villepinte	142,552

# Corporate events and tourism



### A MAGNIFICENT CULTURAL HERITAGE

- Paris Region is the world's no.1 tourist destination
  - 45 million tourists every year (60% from overseas)
  - 32.6 million hotel arrivals
- Its tourist sector is steadily expanding

Annual growth in hotel visitor numbers in Paris Region in 2007 (+5.1% for arrivals and +8.6% for overnight stays) exceeded the national average (+2.8% for arrivals and +3.6% for overnight stays).

- Europe's no.1 region for hotel occupancy
  - 2,345 hotels with 147,157 rooms
  - 24.9% of France's total hotels offer in terms of rooms number
  - An average annual occupation rate of more than 75% in 2007
  - Overseas visitors generated 14.8 million hotel arrivals in 2007 (+4.7% compared to 2006) and 36.9 million overnight stays (+10.3% compared to 2006)
- More than 70 million French and international visitors in the most visited attractions in Paris Region

### Number of rooms by category of hotels and number of hotels in 2007

	0 *	1 *	2 *	3 *	4 *	Total	Hotels
Paris	3,060	3,255	23,606	27,369	19,972	77,262	1,465
Paris Region	16,958	6,533	48,517	46,715	28,434	147,157	2,345

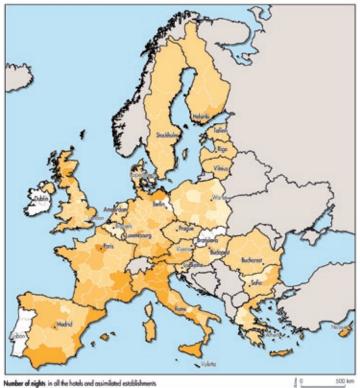
Source: Hotel occupancy survey, INSEE (French Institute of Statistics) - Tourism department - Ile-de-France Tourism Monitoring Unit

### Paris Region Hotels: visitor numbers in 2007

<u> </u>						
	Arrivals (in million)	Growth 2007/2006	Overnight stays (in million)	Growth 2007/2006	Occupancy rate	Growth 2007/2006
Paris	15.4	1.2%	35.7	5.4%	78.5%	3.3 points
Paris Region	32.6	5.1%	67.3	8.6%	75.1%	3.1 points

Source: Paris Ile-de-France Tourist Board

# Hotel occupancy in the European Union regions in 2007



non-RU country

1,000,000 or less

ver 50,000,000

1,000,001 - 5,000,000 5,000,001 - 10,000,000

10,000,001 - 50,000,000

# Paris Region

- The world's leading corporate events destination
- An unrivalled offer for tourists
- A uniquely rich cultural heritage

# The most visited attractions in Paris Region

	Visitors (in million)
Disneyland® Resort Paris	14.5
Notre-Dame de Paris	13.6
Sacré-Cœur in Montmartre	10.5
The Louvre	8.3
Tour Eiffel	6.7
Pompidou Centre	5.5
Château de Versailles	5.3
Musée d'Orsay	3.1
Cité des Sciences et de l'Industrie <sup>(1)</sup>	2.8
Musée du Quai Branly <sup>(2)</sup>	1.3

(1) excluding Géode - (2) opened in June 2006 Source: Paris Ile-de-France Tourist authority

# 

### A HEALTHY LIFESTYLE

- A green region: Paris is surrounded by natural parks and forests
  - 4 Regional Natural Parks
  - 197,000 ha of forests, including Fontainebleau forest (23,000 ha)

 Fontainebleau forest is the largest in Europe and has been classified under UNESCO's "Man and Biosphere" programme since 1998

- 81,000 ha of public forests
- 465 officially protected parks
- 5,000 km of roads
- 1,700 km of cycle lanes
- 600 km of rivers and canals

Only 20% of the region is urbanised.

- Good environment and sports infrastructures
- A world-class medical system
  - One of the world best healthcare system according to the World Health Organization
  - Europe's no.1 hospital network: the AP-HP (Assistance Publique - Hôpitaux de Paris) network comprising more than 38 institutions and some 25,000 beds
  - Paris Region has 15 of France's top 50 hospitals

## **Housing figures in 2005**

	Paris Region	France
Number of homes (thousands)	5,284	30,876
Number of principal residences (thousands)	4,809	25,895
Proportion of individual houses (%)	27.7	56.1
Proportion of rented accommodation (%)	49.5	40.0
Average number of rooms per principal residence	3.4	4.0
Average number of persons per household	2.3	2.3

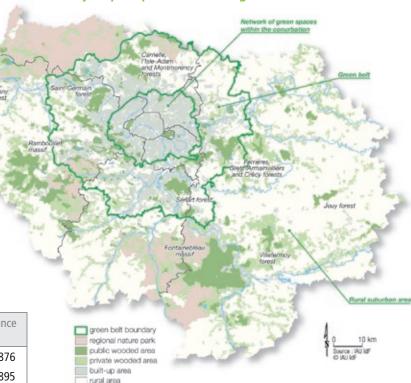
Source: INSEE (French Institute of Statistics)

# **Total number of sports facilities in Paris Region** in 2008

	Public swim- ming pools <sup>(1)</sup>	Multi-sports centres (1)	Playing fields
Paris Region	290	2,277	3,320

(1) Source: Ministry of Health, Youth and Sport (MSJS-RES) / (2) Source: MSJS-RES Operated by IRDS (Regional Sports Development Institute)

# Major open spaces in Paris Region



# Average rental value of private housing in Paris and the inner and outer suburbs as at 01-01-2008

water courses

	Paris	Inner Suburbs	Outer Suburbs
Average surface area (m²)	51	54	62
Average monthly rental (€)	936	758	753
Average monthly rental (€/m²)	18.4	14.1	12.2

Source: Observatoire des Loyers de la Région Parisienne (OLAP)
Paris region rental monitoring agency



#### A HIGH-QUALITY ENVIRONMENT

#### Air quality

### Percentage of days during the year when air quality was

Very good	Good	Average	Poor or very poor (level 6 or higher)
(level 1 or 2)	(level 3 or 4)	(level 5)	
5.8	69.0	15.1	10.1

Source: Airparif

#### Noise

A noise observatory was established in 2009: BruitParif. The region is taking steps to limit and prevent environmental pollution. One of Bruitparif's objectives is to monitor noise pollution and evaluate its impact on population, which includes producing noise maps of the region.

### Biodiversity

In June 2008 Paris Region launched Natureparif, the regional agency for nature and biodiversity, which aims to promote and protect biodiversity in the region.

Paris Region is an impressively biodiverse environment:

- 200 protected species (including 50 tree species)
- 228 species of birds
- 60 species of mammals
- 1,500 species of plants

#### A SUSTAINABLE ENVIRONMENT

### • Energy consumption

Paris Region's high density and efficient public transportation system translate into lower per capita energy consumption than the national average. Paris Region energy consumption is 2.2 toe (tons of oil equivalent), compared with 2.6 toe nationwide.

#### Ecological footprint

Paris Region has launched its ecological footprint calculation and set the target of becoming Europe's first Eco-region.





# Ecological footprint by sector in global hectare and global acre per head per year in 2005

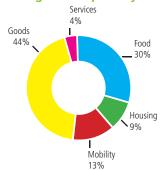
<u> </u>	1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	
Sector	Global hectare	Global acre
Food	1.66	4.10
Housing	0.49	1.21
Mobility	0.70	1.73
Goods	2.49	6.15
Services	0.25	0.62
Total	5.58	13.79

Source : IAU î

The unit used to measure an environmental footprint is global hectare (Gha) per capita (GHa /inhab).

A global hectare is one hectare of biologically productive space with world-average productivity. The number of global hectares corresponding to a real hectare varies by country and by region. A real hectare in France corresponds to 2.58 global hectares, reflecting the fact that French territory has above-average productivity compared with the global average.

# Paris Region ecological footprint by sector in 2005



Source: IAU îdF

- A green region
- A world-class medical system
- A high quality and sustainable environment

# Regional Planning Agency



A 200-strong multidisciplinary team with expertise covering all aspects of planning in Ile-de-France

## Analysis, ideas, projects

In organisational terms, IAU île-de-France has six main specialist divisions sustainable planning and development, urban planning and regional development, mobility and transport, urban and rural environment, the economy, employment and local development, demographics and housing - plus a number of dedicated units (documentation centre, communication, health, urban safety, and sport).



IAU île-de-France has been working closely with the regional authorities since 2003, assisting them in drawing up their development plans; exploring challenges and development options, promoting participatory processes and public enquiries, and producing draft development plans.

### Networks, partnerships, missions abroad

IAU île-de-France is constantly adapting to a changing environment, looking to the future and pinpointing the long-term changes expected in the region. It is actively involved in a wide range of networks and partnerships, giving it access to additional resources and expertise. IAU île-de-France has been already active in around 40 countries through contracts and cooperation agreements.

# An information hub and communications resource

In the framework of its public relations policy, IAU île-de-France also produces a wide range of publications, many of which are available online at www.iau-idf.fr IAU île-de-France has developed various databases and integrated them within its regional geographical information system (RGIS), and this information is available on its website in the form of interactive maps.

#### Chairman

IAU île-de-France is chaired by Jean-Paul Huchon, Chair of the Ile-de-France Regional Council.

#### **Managing Director**

François Dugeny.

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# The easiest way to get to know the Paris Region

You are going to set up business in the Paris Region: Econovista.com allows you to see and assess a selection of locations.

With its innovative free access Internet interface, you can discover everything that our region has to offer you, economically and geographically. You can select your own criteria, list your priorities, download the geographical data and display the maps that meet your criteria.

Welcome to the Paris Region!





The Paris Region and its economy available 'à la carte' To help put you on the map



# \* Paris Region:

- population of 11.6 million
- the second popular location for the world's 500 largest companies
- · Europe's second largest airport facility
- Europe's largest stock of commercial real estate
- the world's number one destination for professional events and meetings

# Paris Region Economic Development Agency ensures the follow up of your setting process

- · succeeding in your preparations
- · building your teams
- · cutting through the red tape
- · finding the right partners
- launching your communication

Paris Region Economic Development Agency 3, rue des Saussaies - 75008 PARIS Tel: +33 (0)1 58 18 69 00

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