



Paris - Ile de France Capitale Economique

# Soirée de l'Attractivité

2017





# GLOBAL CITIES INVESTMENT MONITOR 2017

NEW RANKINGS, TRENDS AND CRITERIA

**KPMG**



Greater Paris Investment Agency



Paris - Ile de France Capitale Economique

## GLOBAL CITIES INVESTMENT MONITOR 2017



### Nicolas BEAUDOIN

Associé et Directeur du développement  
pour la région Paris & Centre  
KPMG



### Alexandre MISSOFFE

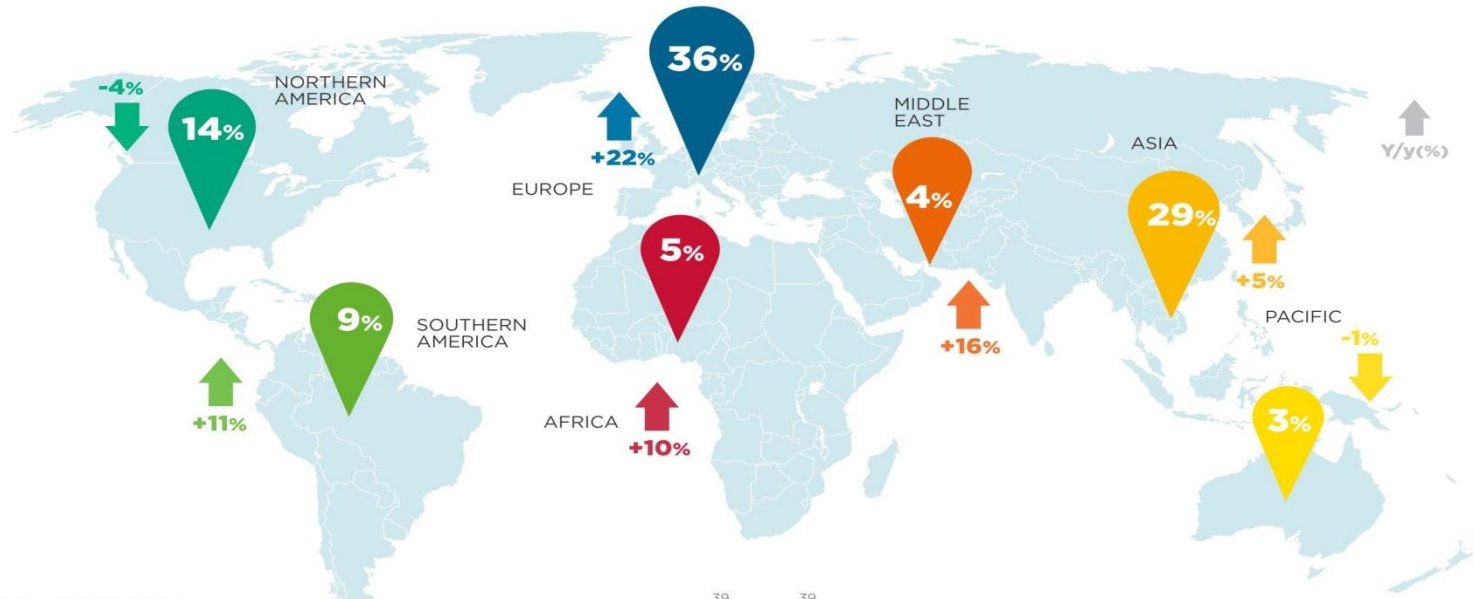
Directeur général,  
Paris-Ile de France Capitale Economique



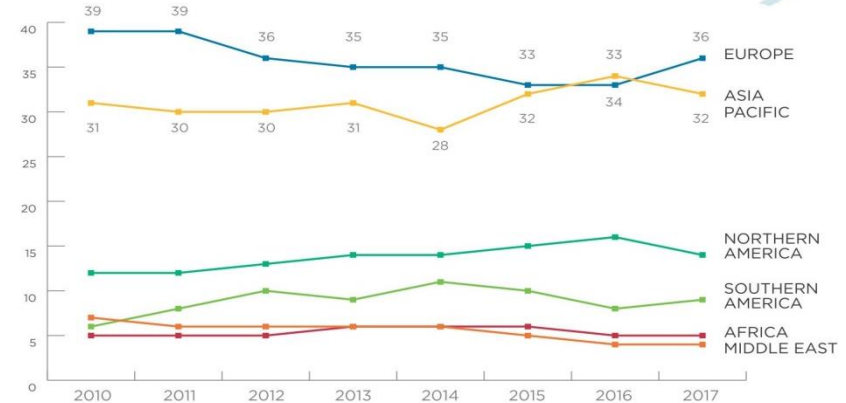
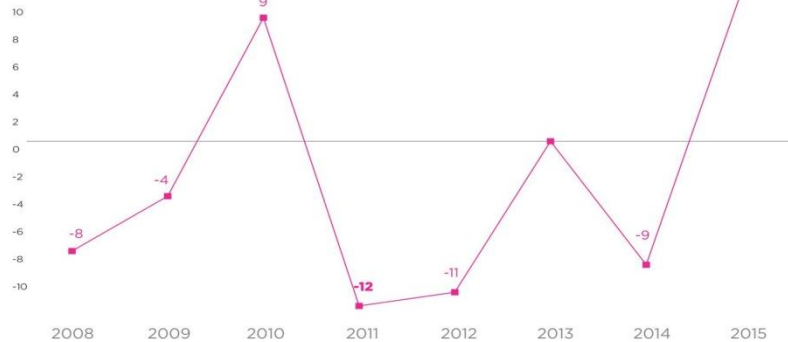
# INTERNATIONAL GREENFIELD INVESTMENTS

## DESTINATION OF INTERNATIONAL GREENFIELD INVESTMENTS BY WORLD REGION

Percentage of total



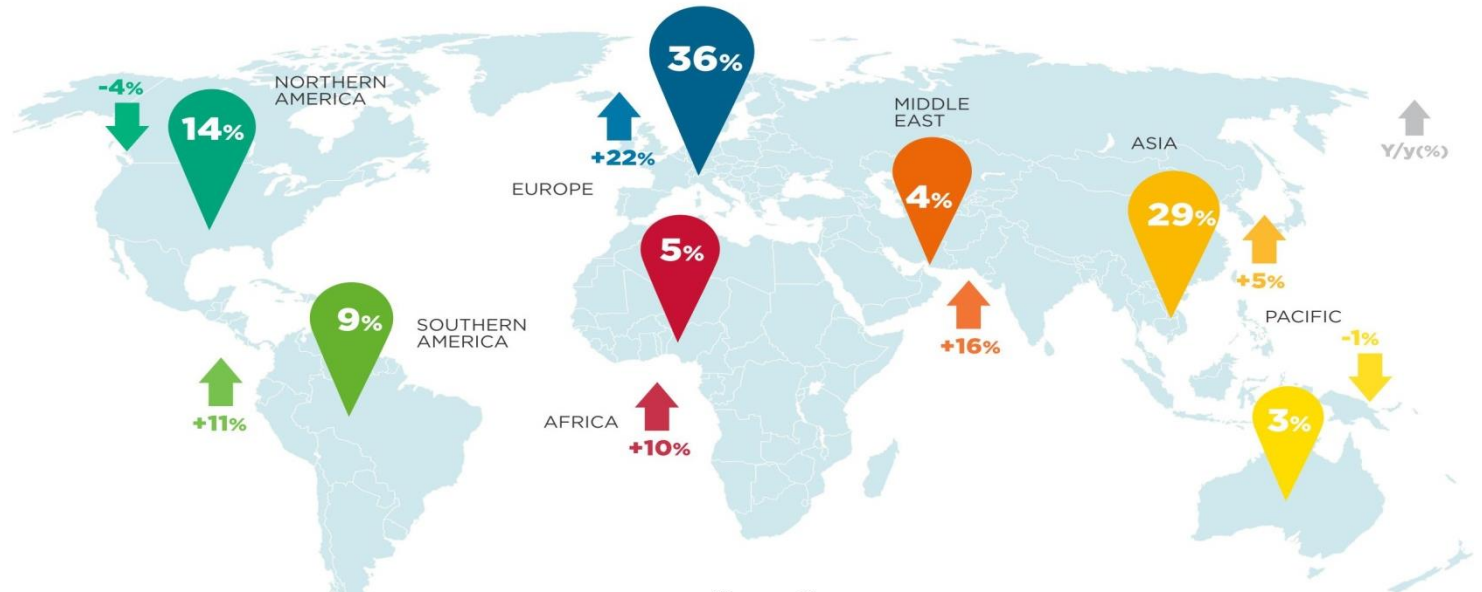
## GLOBAL INTERNATIONAL GREENFIELD INVESTMENTS: YEAR-ON-YEAR CHANGES (%)



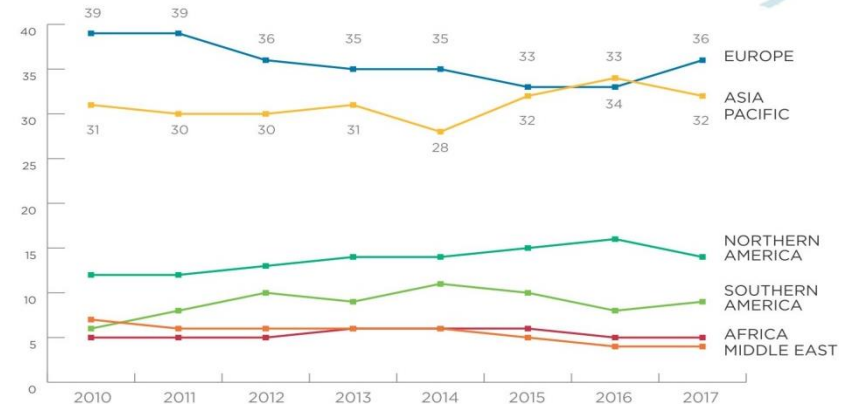
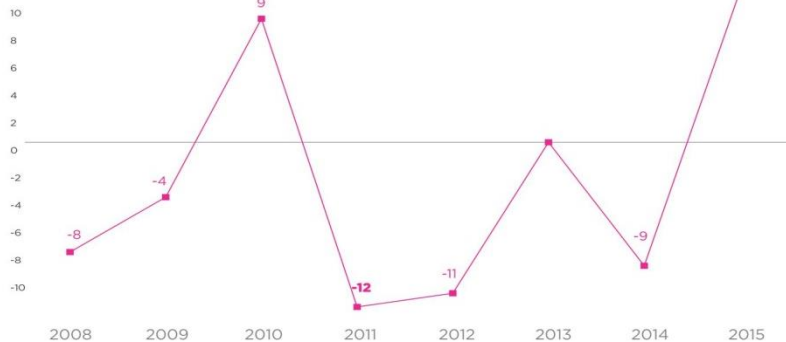
# INTERNATIONAL GREENFIELD INVESTMENTS

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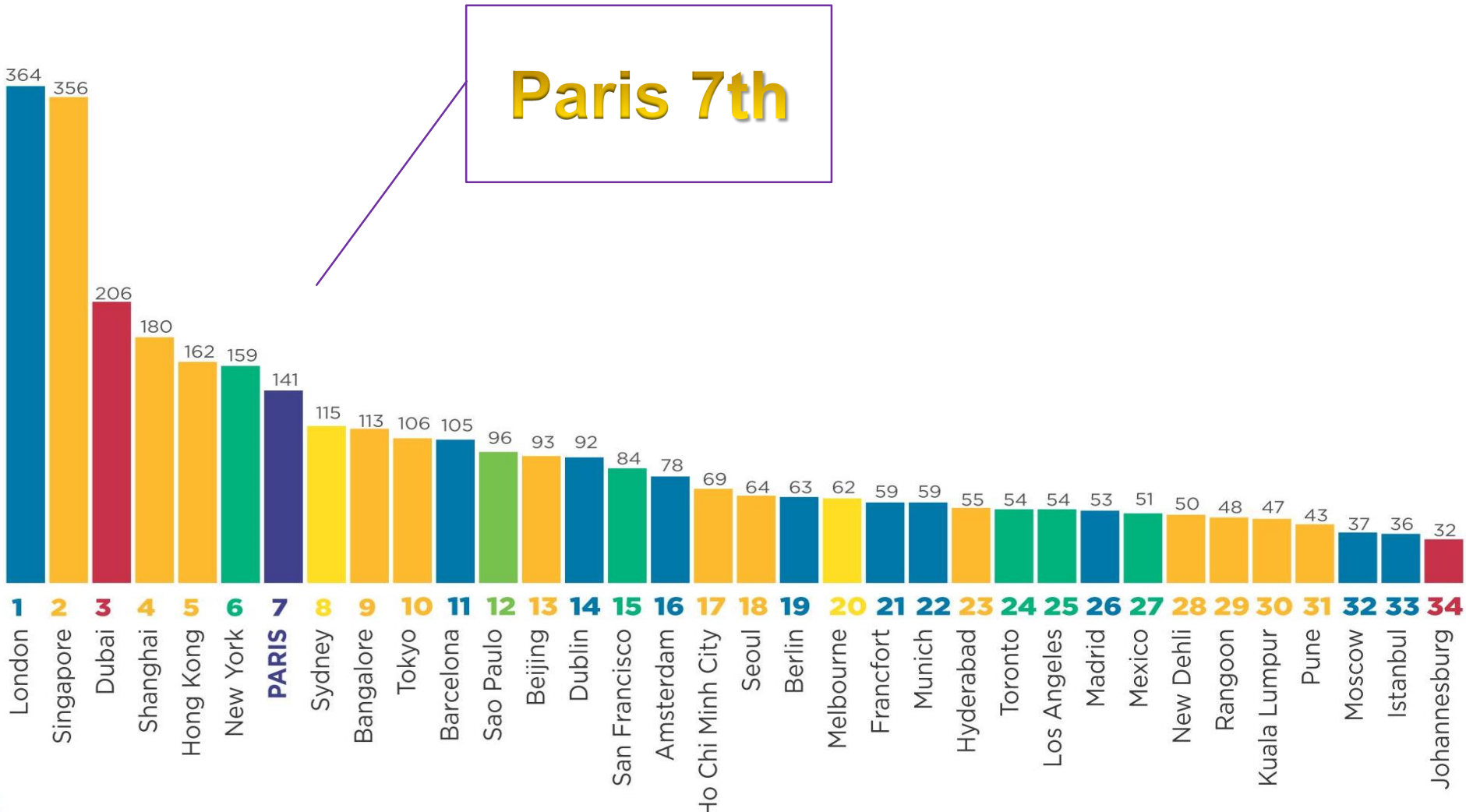
## GLOBAL INTERNATIONAL GREENFIELD INVESTMENTS: YEAR-ON-YEAR CHANGES (%)



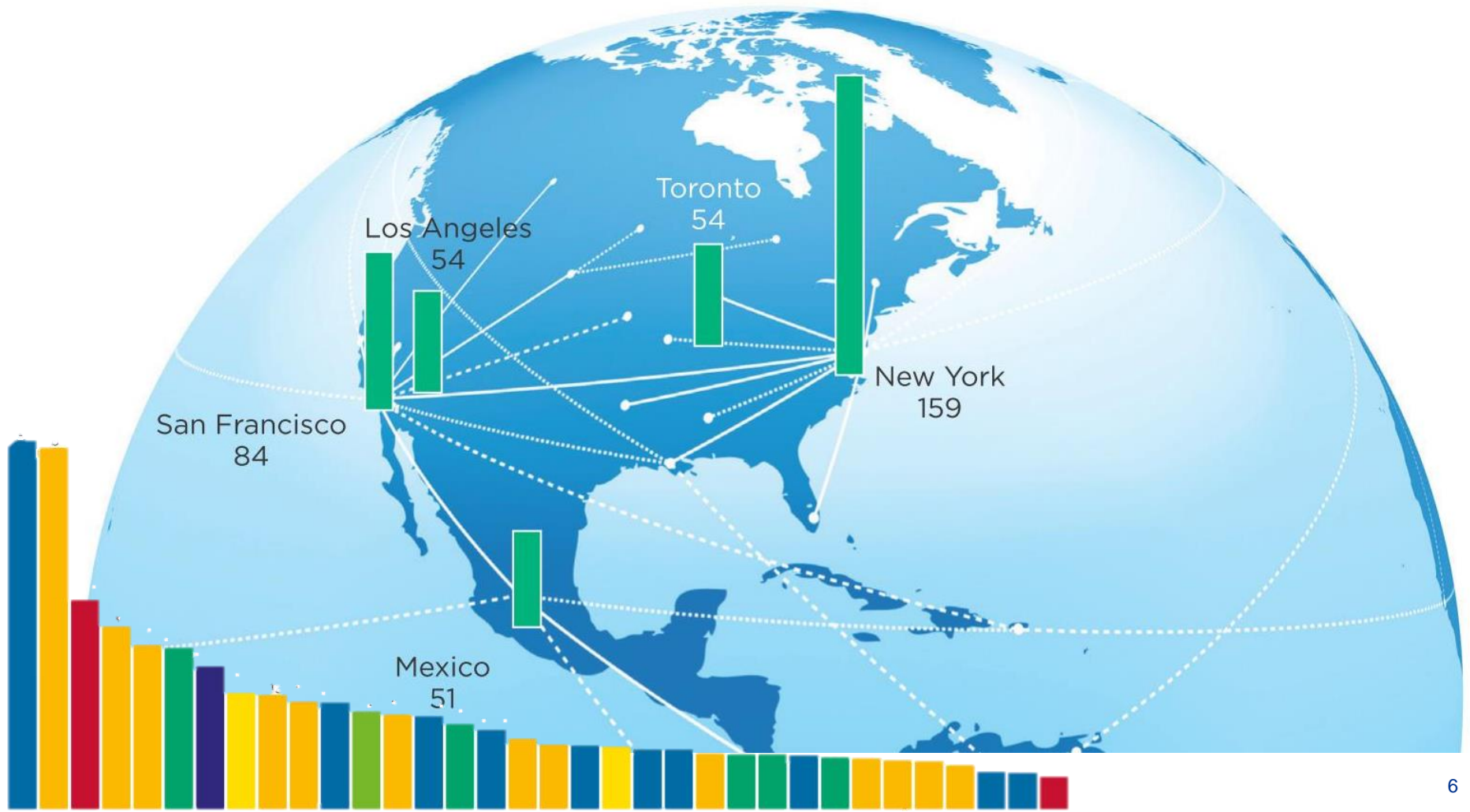


# INTERNATIONAL GREENFIELD INVESTMENTS

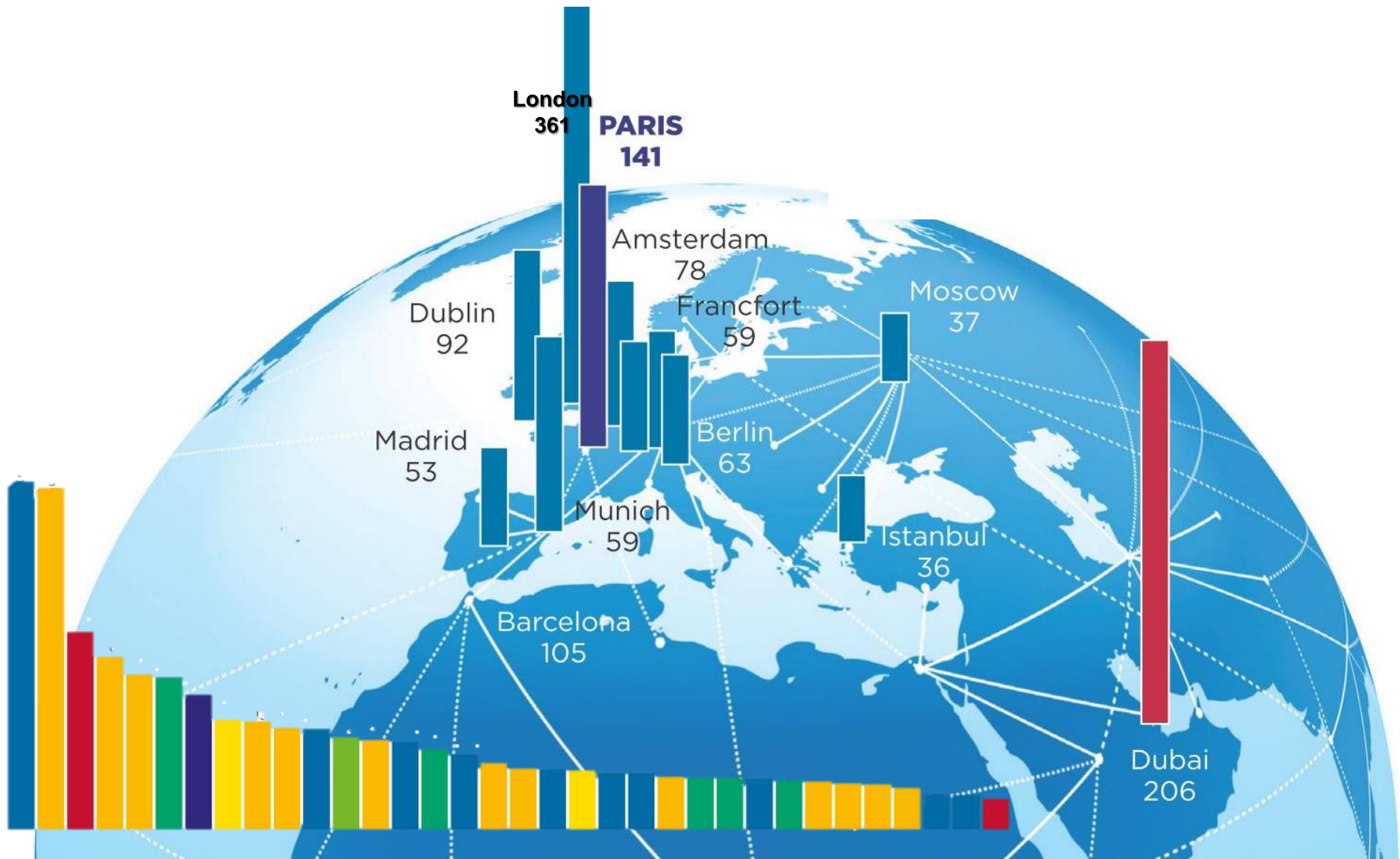
**Paris 7th**



# INTERNATIONAL GREENFIELD INVESTMENTS

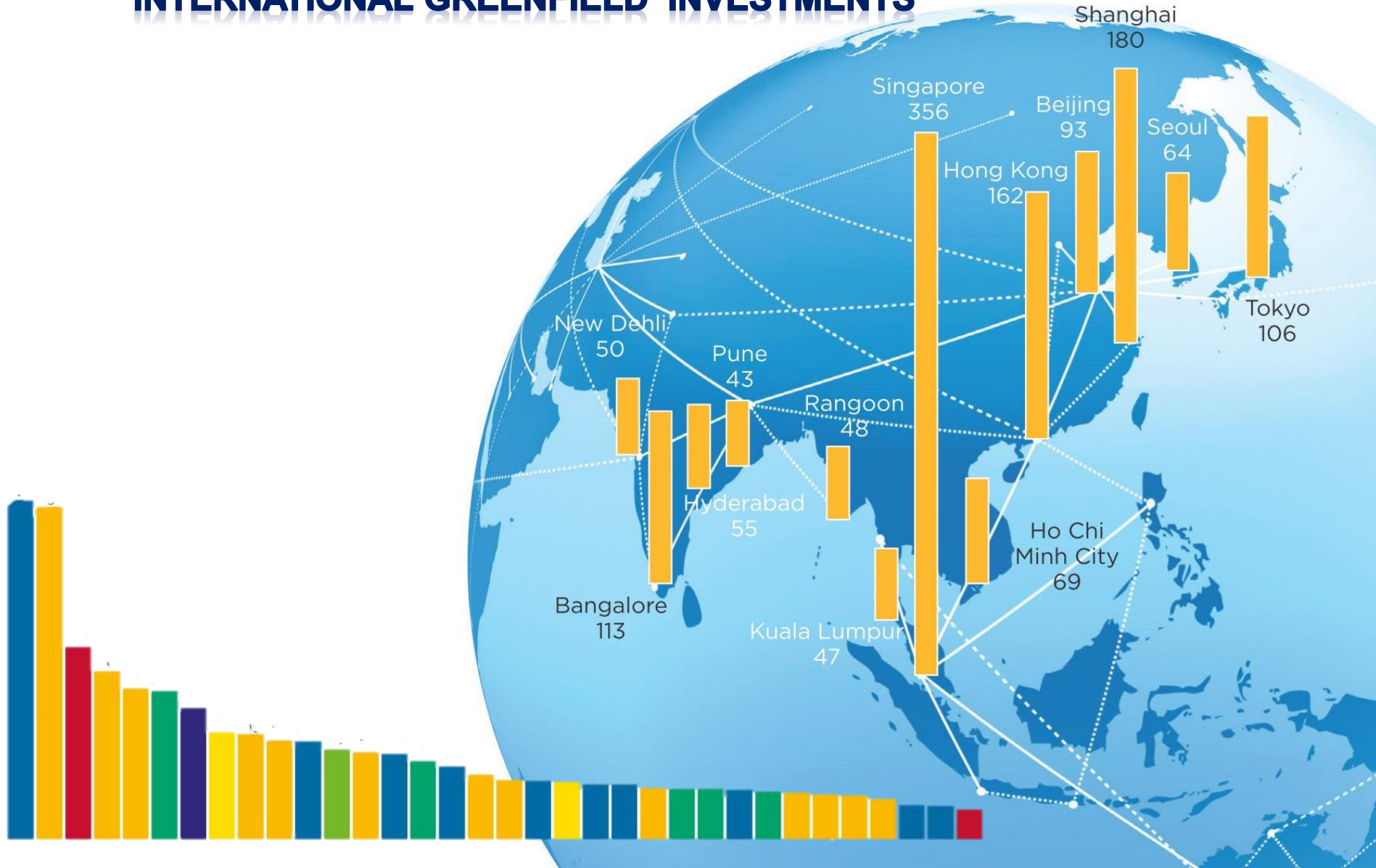


# INTERNATIONAL GREENFIELD INVESTMENTS





## INTERNATIONAL GREENFIELD INVESTMENTS

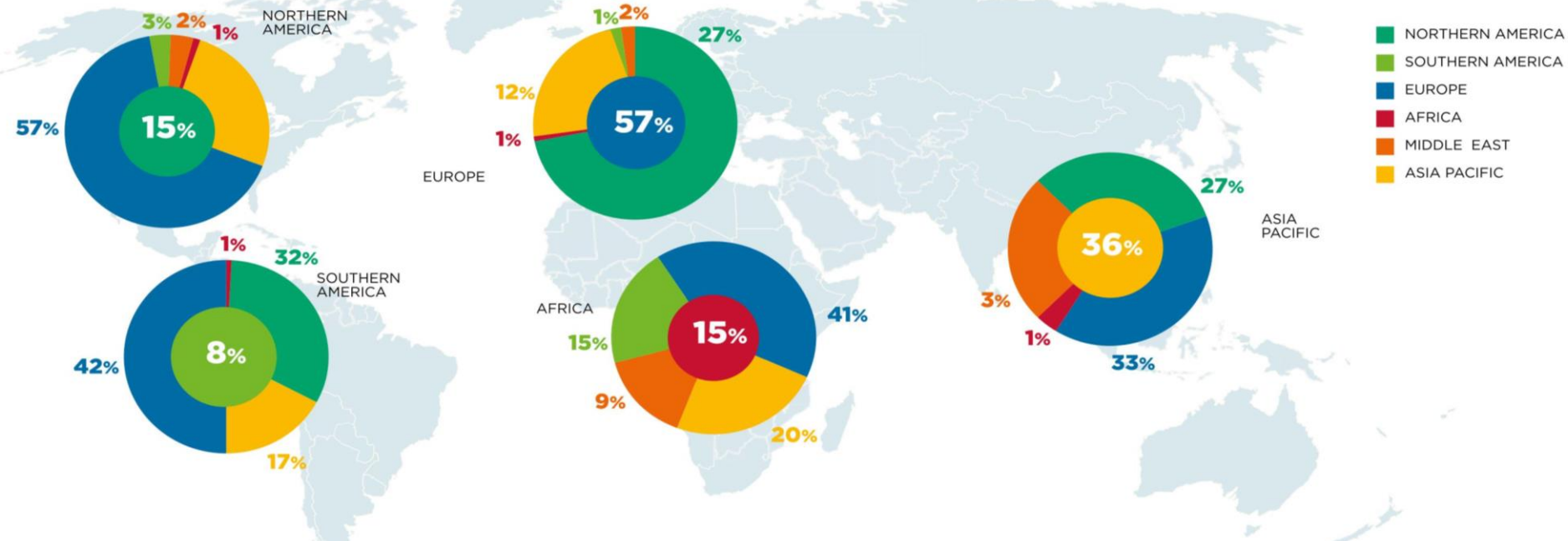


# INTERNATIONAL GREENFIELD INVESTMENTS



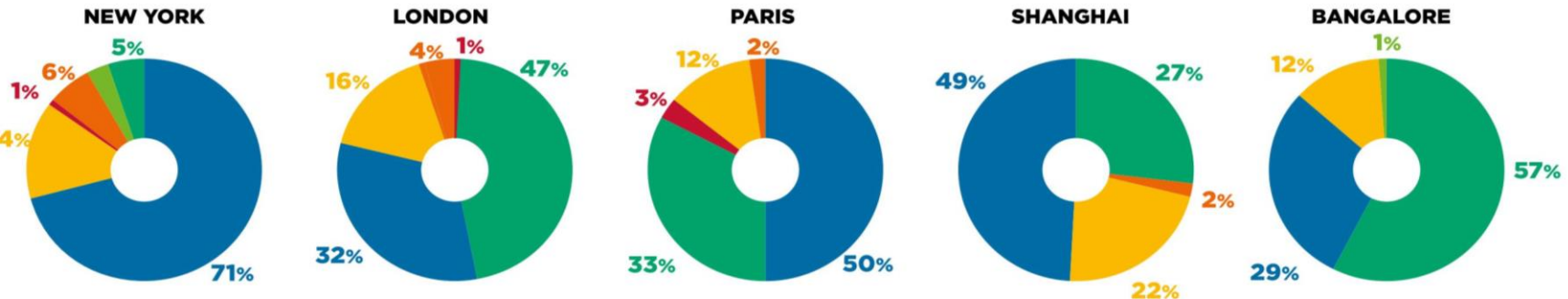
**ORIGINS OF INTERNATIONAL GREENFIELD INVESTMENTS BY WORLD REGION**

Percentage of total



**ORIGINS OF INTERNATIONAL GREENFIELD INVESTMENTS IN SELECTED CITIES**

Percentage of total



## INTERNATIONAL GREENFIELD INVESTMENTS

### FOCUS ON...

#### 1. STRATEGIC FUNCTIONS :





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## GLOBAL CITIES INVESTMENT MONITOR 2017



### Hugues CAZENAVE

Président,  
OpinionWay



### Alexandre MISSOFFE

Directeur général,  
Paris-Ile de France Capitale Economique

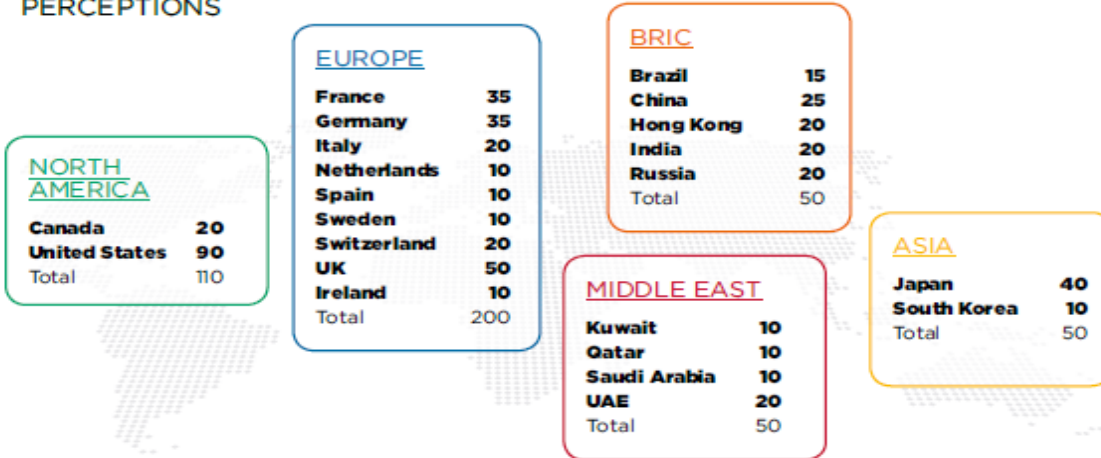




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# GLOBAL CITIES INVESTMENT MONITOR 2017

## METHODOLOGY PERCEPTIONS

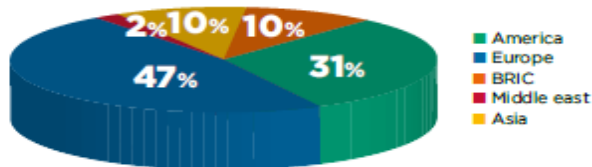


A poll conducted with a representative sample of **510 companies with international business settlements**

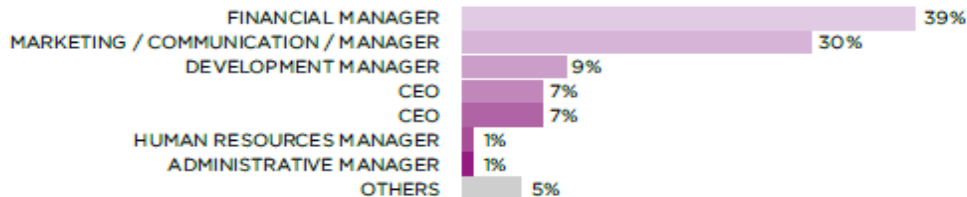
- 22 countries
- 3 criteria:
  - Location of headquarters
  - Industry
  - Turnover
- Phone interviews with global business leaders  
(CEO, managing director, administrative and financial manager, sales manager, head of international investment)

From 12 January to 16 March 2017

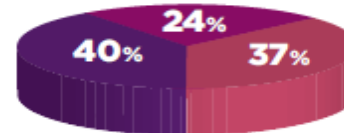
### COMPANIES BY COUNTRY OF ORIGIN



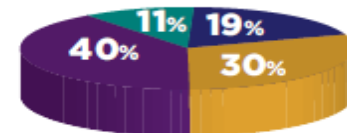
### POSITION OF THE INTERVIEWEE



### REVENUE (in €)



### BUSINESS ACTIVITY



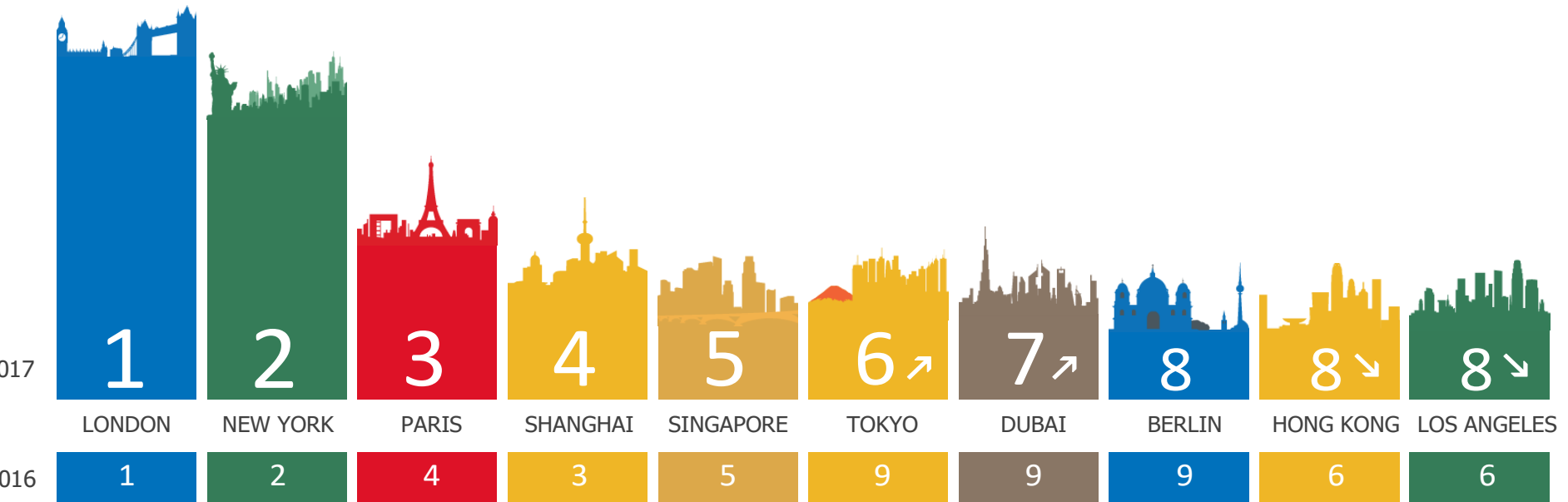
■ Less than 500 million  
■ Between 500 millions and 5 billion  
■ More than 5 billion

■ Service  
■ IT  
■ Heavy industry  
■ Consumer goods

## 514 INTERNATIONAL INVESTORS INTERVIEWED

### CITIES GLOBAL ATTRACTIVENESS

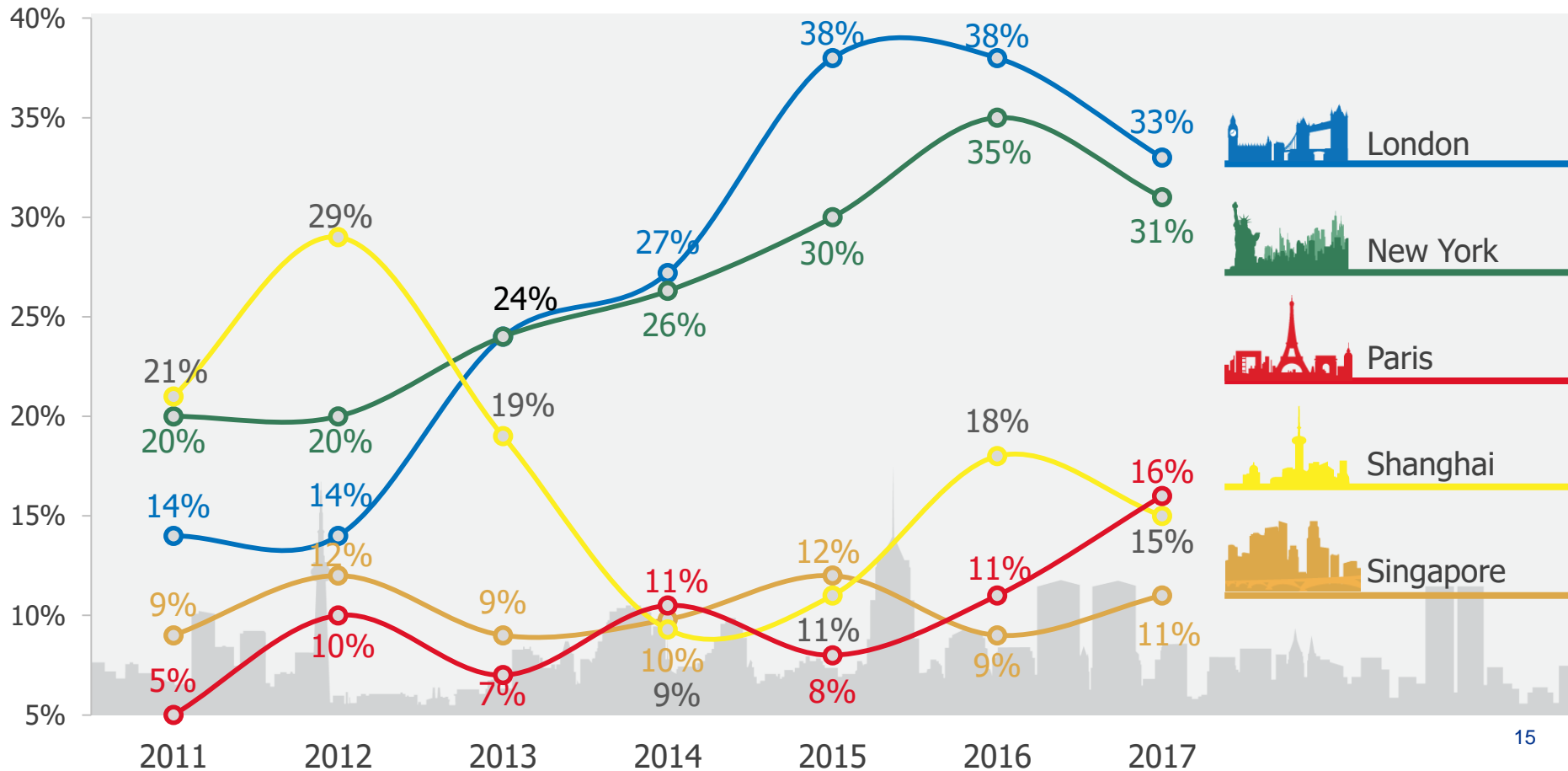
*“In your view, which 3 major world capitals are currently the most attractive locations for setting up a business in general (whether another business or yours)?”*



## 514 INTERNATIONAL INVESTORS INTERVIEWED

### CITIES GLOBAL ATTRACTIVENESS

*“In your view, which 3 major world capitals are currently the most attractive locations for setting up a business in general (whether another business or yours)?”*



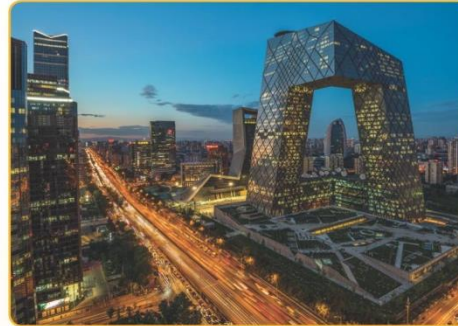
## 514 INTERNATIONAL INVESTORS INTERVIEWED

### CITIES' GLOBAL FUTURE (ANTICIPATED) ATTRACTIVENESS



1

Shanghai



2 ↗

Beijing



2 ↗

Mumbai



4 ↗

Paris



5 ↗

Dublin



5 ↗

Berlin



7 ↗

Singapore



7 ↘

London



7 ↘

Toronto



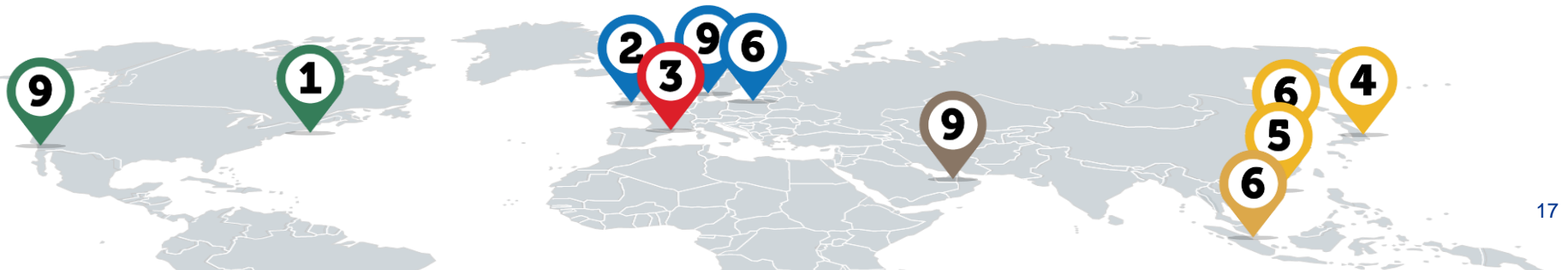
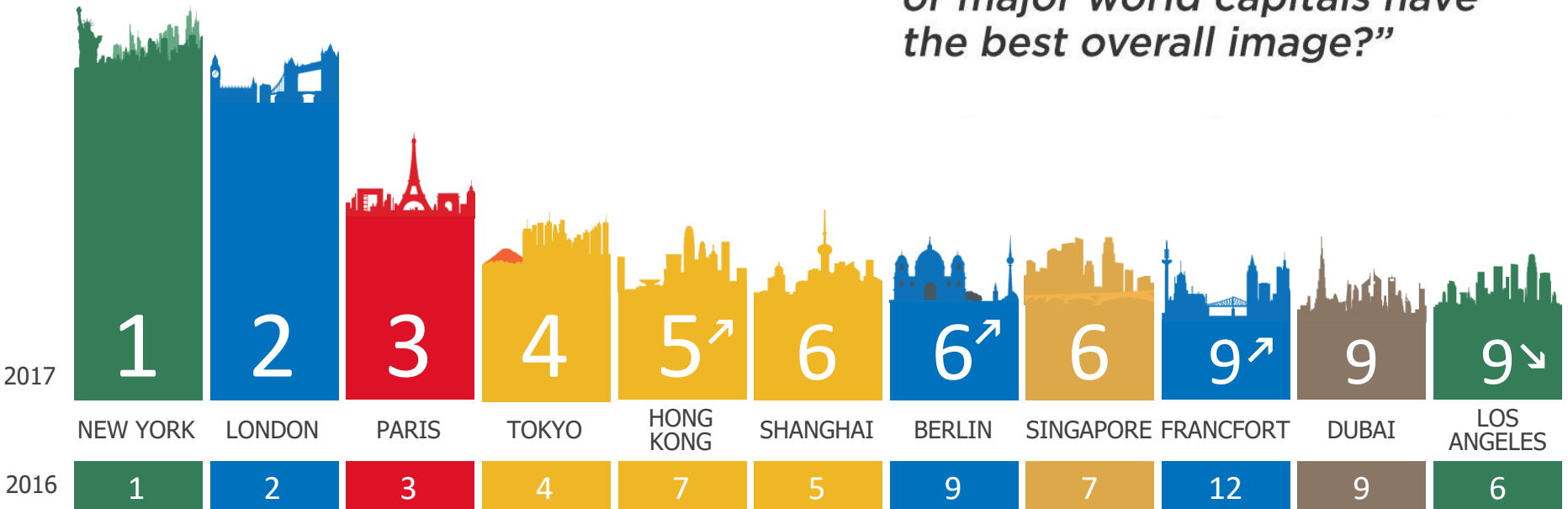
7 ↗

Abu Dhabi

**514 INTERNATIONAL INVESTORS INTERVIEWED**

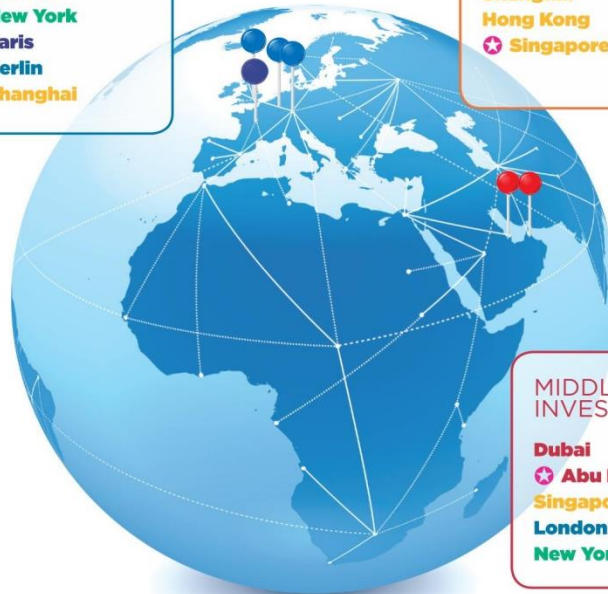
**CITIES' GLOBAL IMAGE**

*“In your view, which 3 cities or major world capitals have the best overall image?”*



**514 INTERNATIONAL INVESTORS INTERVIEWED**

**CITIES' REGIONAL IMAGES**



**514 INTERNATIONAL INVESTORS INTERVIEWED**

**TOP 10 INVESTMENT CRITERIA**

**1. POLITICAL STABILITY AND JURIDICAL SECURITY**



**2. AVAILABILITY OF SKILLED HR**



**3. MARKET ACCESSIBILITY AND SIZE**



**4. INFRASTRUCTURE**



**5. ECONOMIC GROWTH**



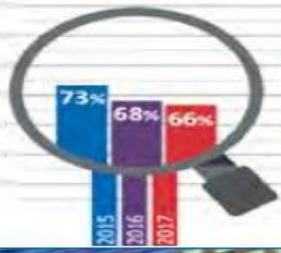
**6. LIVING COSTS, SALARIES AND TAX LEVELS**



**7. QUALITY OF EDUCATION**



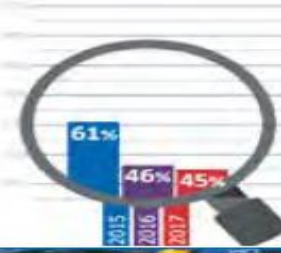
**8. AVAILABILITY AND COST OF REAL ESTATE**



**9. QUALITY OF RESEARCH AND INNOVATION**



**10. QUALITY OF LIFE**



**11. STARTUP ECOSYSTEM**





## 514 INTERNATIONAL INVESTORS INTERVIEWED

### TOP GLOBAL CITIES FOR EACH INVESTMENT CRITERION

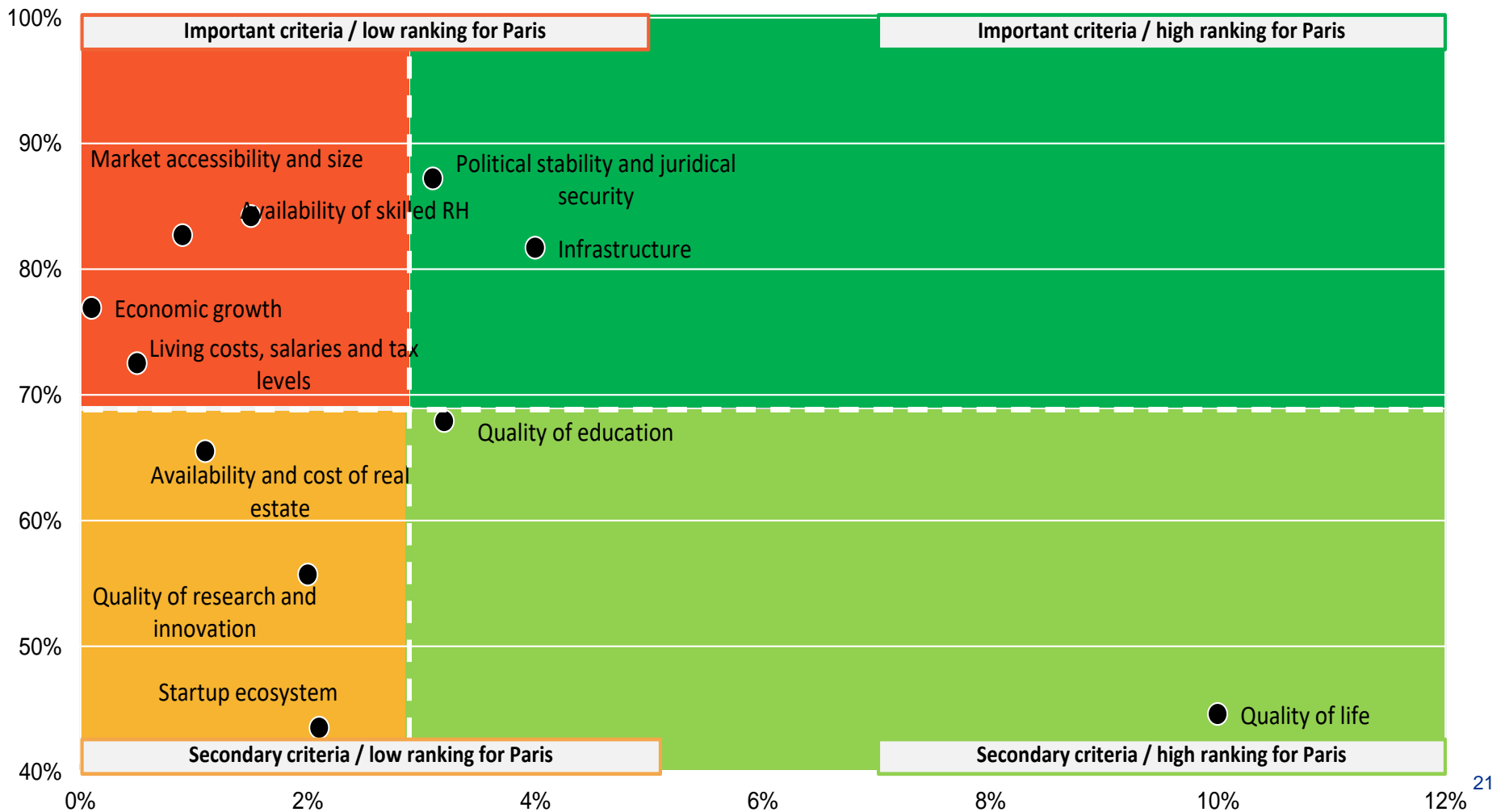
*Paris*

	1 <sup>er</sup>	2 <sup>e</sup>	3 <sup>e</sup>	4 <sup>e</sup>	5 <sup>e</sup>	6 <sup>e</sup>	2017	2016
<b>1. POLITICAL STABILITY AND JURIDICAL SECURITY</b>	London	Francfort	New York	Tokyo	Zurich	Berlin	8 <sup>e</sup> ↗	9 <sup>e</sup>
<b>2. AVAILABILITY OF SKILLED HR</b>	London	New York	Francfort	San Francisco	Bangalore	Shanghai	8 <sup>e</sup> ↘	3 <sup>e</sup>
<b>3. MARKET ACCESSIBILITY AND SIZE</b>	New York	Shanghai	Francfort	Beijing	Francfort	Dublin	14 <sup>e</sup> ↗	15 <sup>e</sup>
<b>4. INFRASTRUCTURE</b>	London	New York	Francfort	Tokyo	Los Angeles	<b>PARIS</b>	6 <sup>e</sup> ↘	3 <sup>e</sup>
<b>5. ECONOMIC GROWTH</b>	Shanghai	Beijing	Mumbai	New York	London	Hong Kong	-	-
<b>6. LIVING COSTS, SALARIES AND TAX LEVELS</b>	London	Singapore	Shanghai	Mumbai	Dublin	Francfort	-	-
<b>7. QUALITY OF EDUCATION</b>	London	New York	Francfort	Singapore	Boston	Los Angeles	7 <sup>e</sup> ↘	6 <sup>e</sup>
<b>8. AVAILABILITY AND COST OF REAL ESTATE</b>	Shanghai	Francfort	Beijing	London	Dublin	Madrid	17 <sup>e</sup> →	17 <sup>e</sup>
<b>9. QUALITY OF RESEARCH AND INNOVATION</b>	San Francisco	New York	London	Francfort	Bangalore	Tokyo	7 <sup>e</sup> ↗	8 <sup>e</sup>
<b>10. QUALITY OF LIFE</b>	London	<b>PARIS</b>	New York	San Francisco	Barcelona	Francfort	2 <sup>e</sup> →	2 <sup>e</sup>
<b>11. STARTUP ECOSYSTEM</b>	San Francisco	London	New York	Berlin	Dublin	<b>PARIS</b>	6 <sup>e</sup>	-
<b>TOTAL</b>	New York	London	San Francisco	Shanghai	<b>PARIS</b>	Francfort	5 <sup>e</sup> ↘	4 <sup>e</sup>



**514 INTERNATIONAL INVESTORS INTERVIEWED**

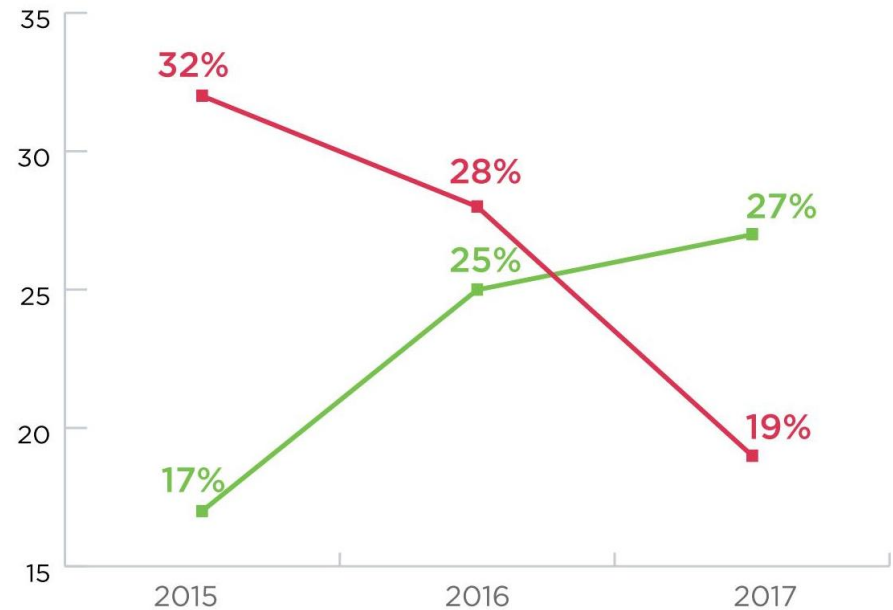
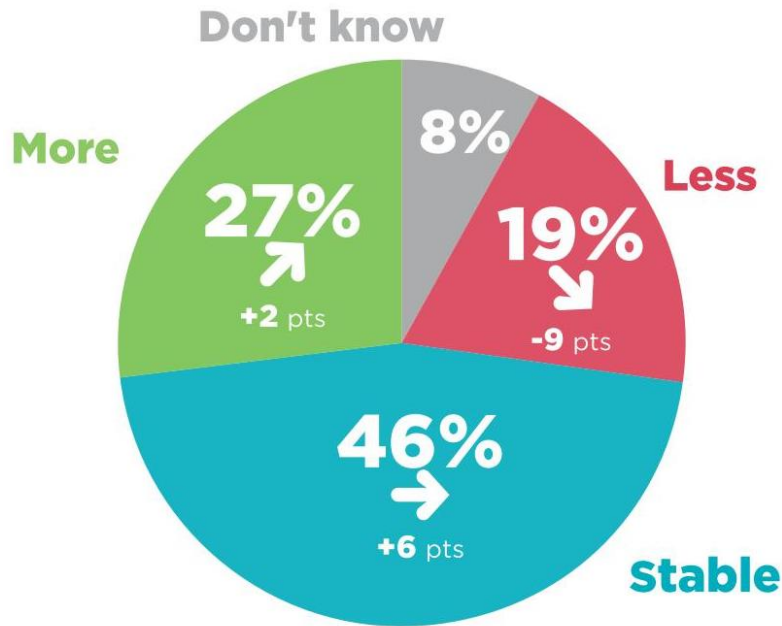
**FOCUS ON PARIS**



## 514 INTERNATIONAL INVESTORS INTERVIEWED

### FOCUS ON PARIS

*“In your view, will Paris over the three next years become more or less attractive as a location for setting up a business in general (whether another business or yours) or will its attractiveness be stable?”*



## 514 INTERNATIONAL INVESTORS INTERVIEWED

## FOCUS ON PARIS

*“In your view, will Paris over the three next years become more or less attractive as a location for setting up a business in general (whether another business or yours) or will its attractiveness be stable?”*

### More

- *“Because after Brexit investors will exit London and move to Paris”*
- *“Because of political change in France”*
- *“Paris is the city of fashion and tourism. This helps”*
- *“Political stability is an asset for France”*
- *“It is one of the most beautiful cities in the world”*
- *“Because of all the development projects, the new infrastructure and possibly the Olympics ”*

### Stable

- *“Paris is a major business center. Terrorism cannot change business climate”*
- *“France is stable as a European Union and Euro member”*
- *“Politics and economics will be stable”*
- *“This is a mature market. Upheaval is unlikely”*
- *“Growth is not equivalent as Germany’s”*

### Less

- *“Because of terrorism”*
- *“Insecurity is on the rise in Paris”*
- *“Because of immigration, like the rest of Europe”*
- *“Because of the language”*

**514 INTERNATIONAL INVESTORS INTERVIEWED**

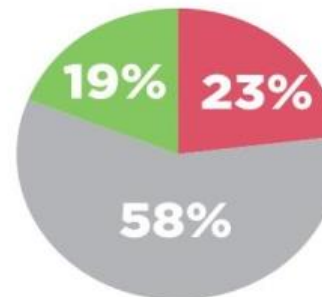
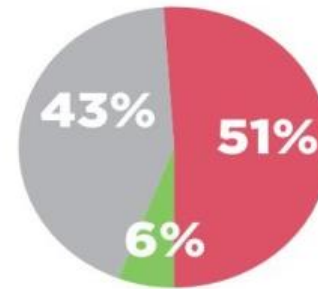
**FOCUS ON BREXIT**

*“In your view, will Brexit, the United Kingdom’s decision to the European Union, make it more or less likely that your company sets up a business”*

**IN LONDON**



**...IN THE EUROPEAN UNION?**



**More**  
**Less**  
**Indifferent**

## 514 INTERNATIONAL INVESTORS INTERVIEWED

### FOCUS ON BREXIT

“In your view, which city would be the most attractive to set up a business in Europe?”

