

Soirée de l'Attractivité – 14 juin 2012



Global Cities Investment Monitor 2012



Paris-Ile de France Capitale Economique



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Partie 1 - Perceptions

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Chiara CORAZZA, *Directeur Général, Paris-Ile de France Capitale Economique*
Hugues CAZENAVE, *Président, OpinionWay*



Perceptions



PERCEPTIONS



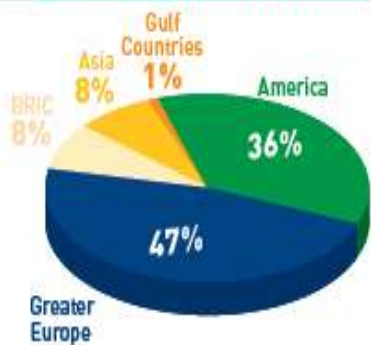
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A poll conducted by

The innovative research company

- Representative sample of **512 companies with international business settlements**
- 25 countries
- **3 criteria:**
 - Headquarter location
 - Industry
 - Turnover
- **Phone interviews with global business leaders** (CEO, managing director, administrative and financial manager, sales manager, head of international investment)
- From 23rd November to 15th December 2011

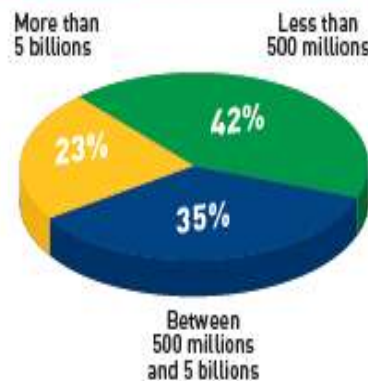
COMPANIES BY COUNTRY OF ORIGIN



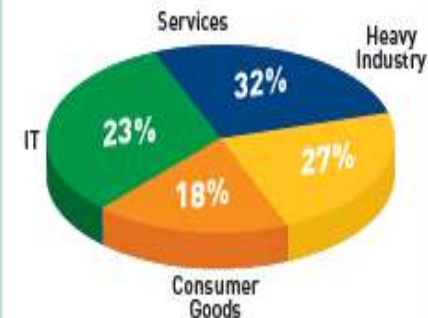
POSITION OF THE INTERVIEWEE



TURNOVER (In euros)



BUSINESS ACTIVITY



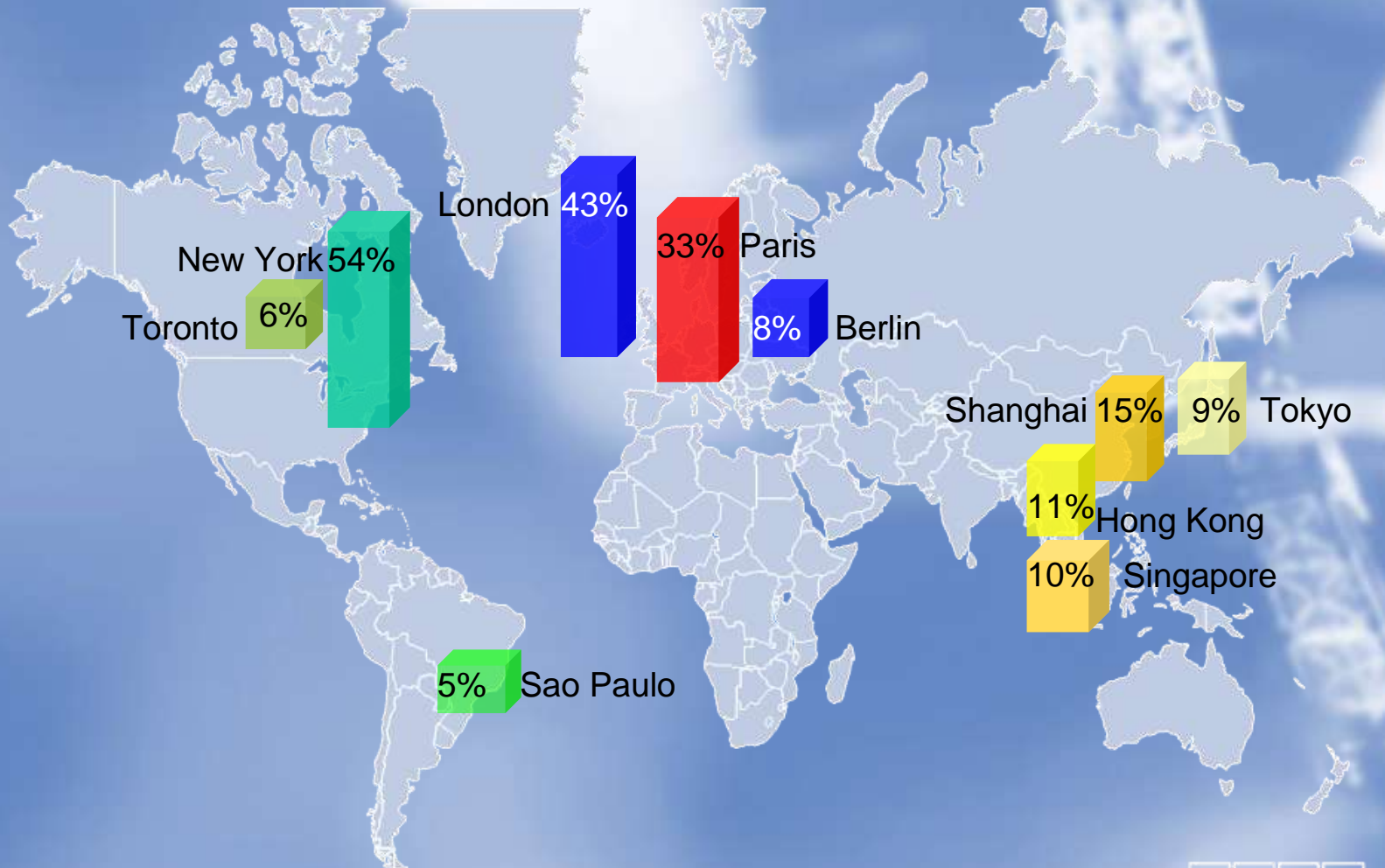


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Perception

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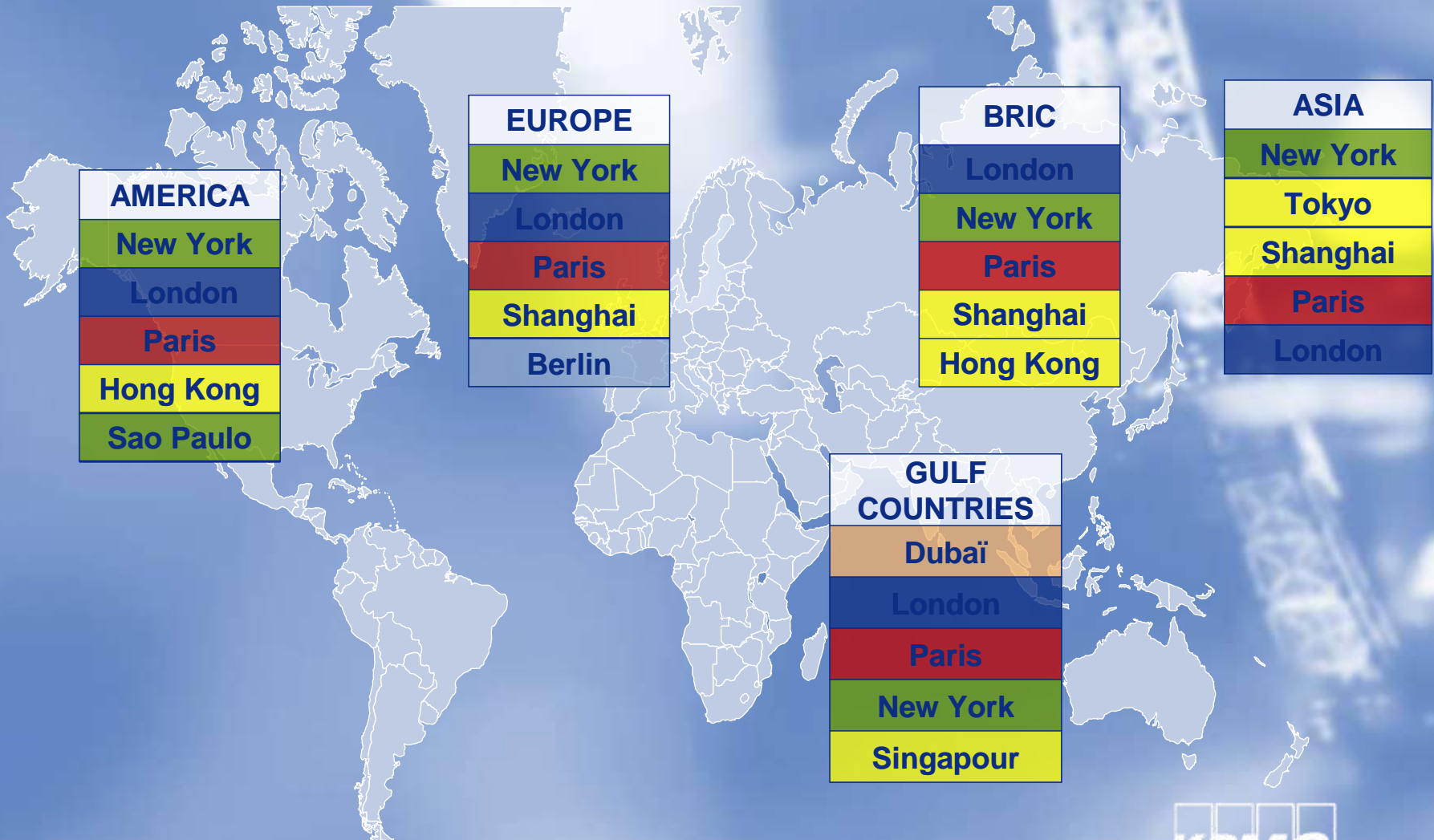


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Perception

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IMAGE-TOP 5





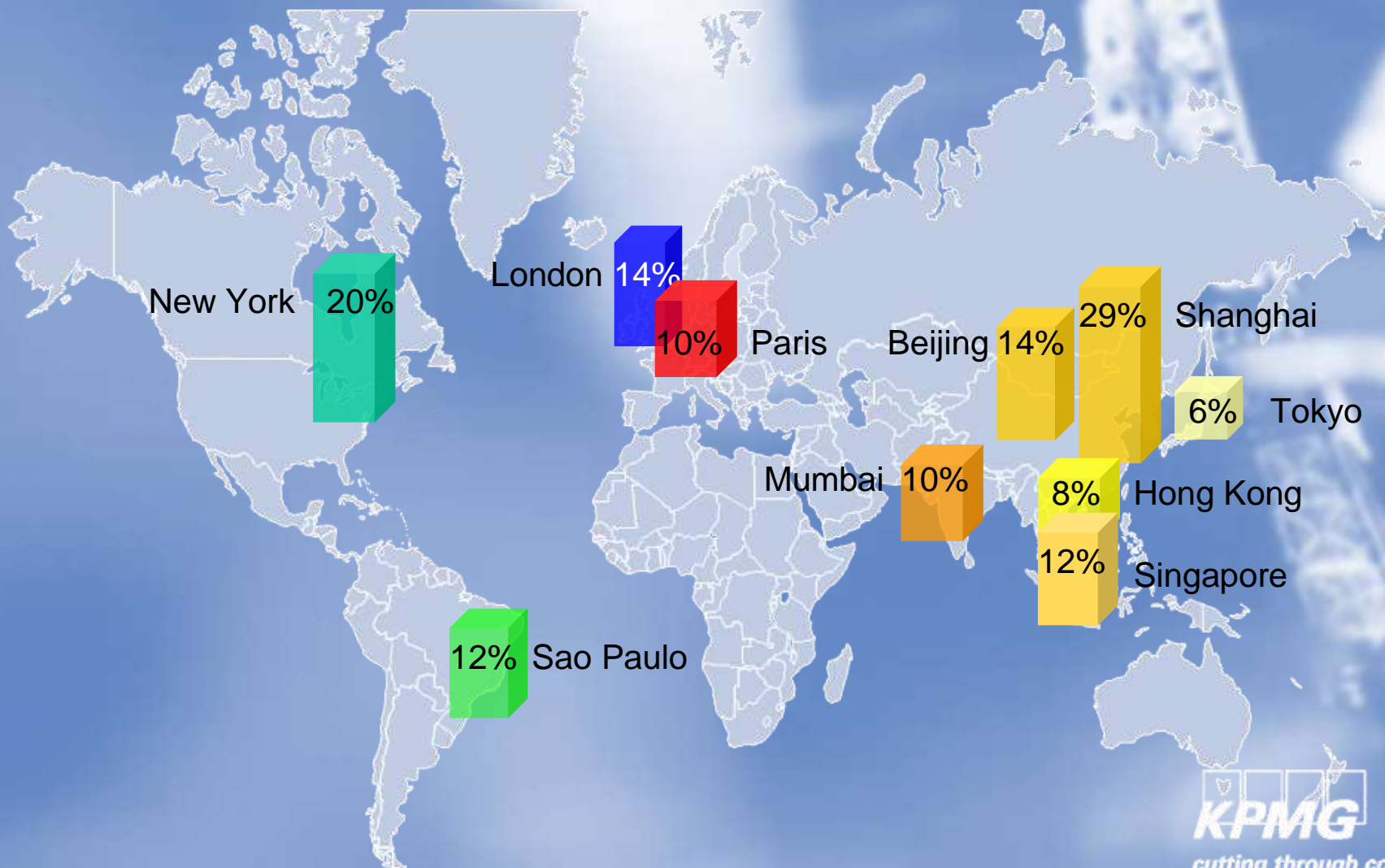
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Perception

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Most attractive location

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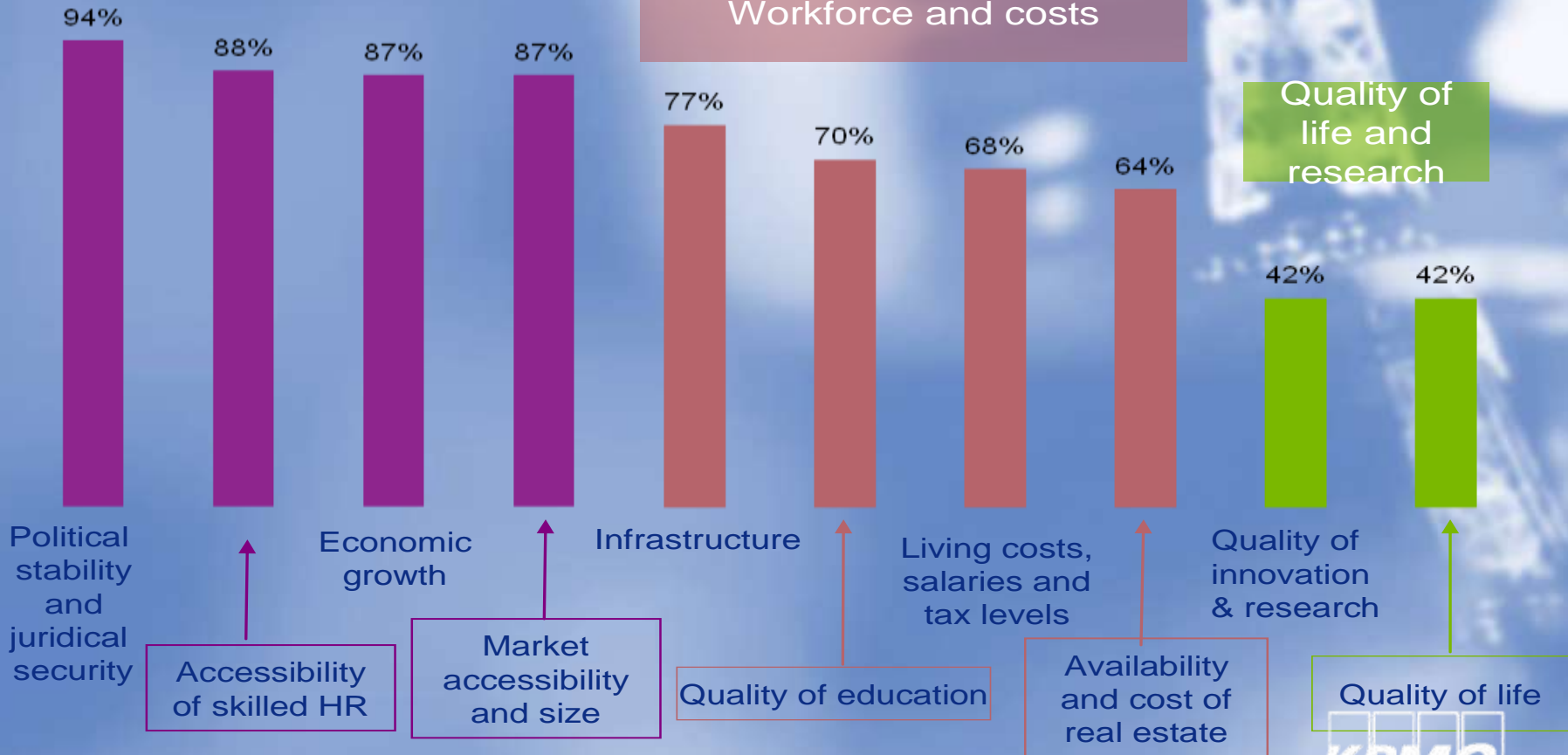


INVESTMENT CRITERIA

Political and economic context

Workforce and costs

Quality of life and research





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CITIES' ATTRACTIVENESS BY INVESTMENT CRITERION

	1	2	3	4	5
Political stability and juridical security	New York	London	Berlin	Francfort	Tokyo
Market accessibility and size	New York	Mumbai	London	Shanghai	Berlin
Economic growth	Shanghai	Beijing	Sao Paulo	Mumbai	Hong Kong
Availability of skilled HR	Shanghai	New York	Beijing	Sao Paulo	London
Infrastructure	New York	London	Shanghai	Hong Kong	Berlin
Living costs, salaries and tax levels	London	New York	Beijing	Berlin	Shanghai
Quality of education	Beijing	Mumbai	Shanghai	New York	Berlin
Availability and cost of real estate	New York	Mumbai	Shanghai	Beijing	London
Quality of research and innovation	New York	London	San Francisco	Berlin	Mumbai
Quality of life	London	New York	Paris	Berlin	San Francisco
Total	New York	Shanghai	London	Beijing	Berlin

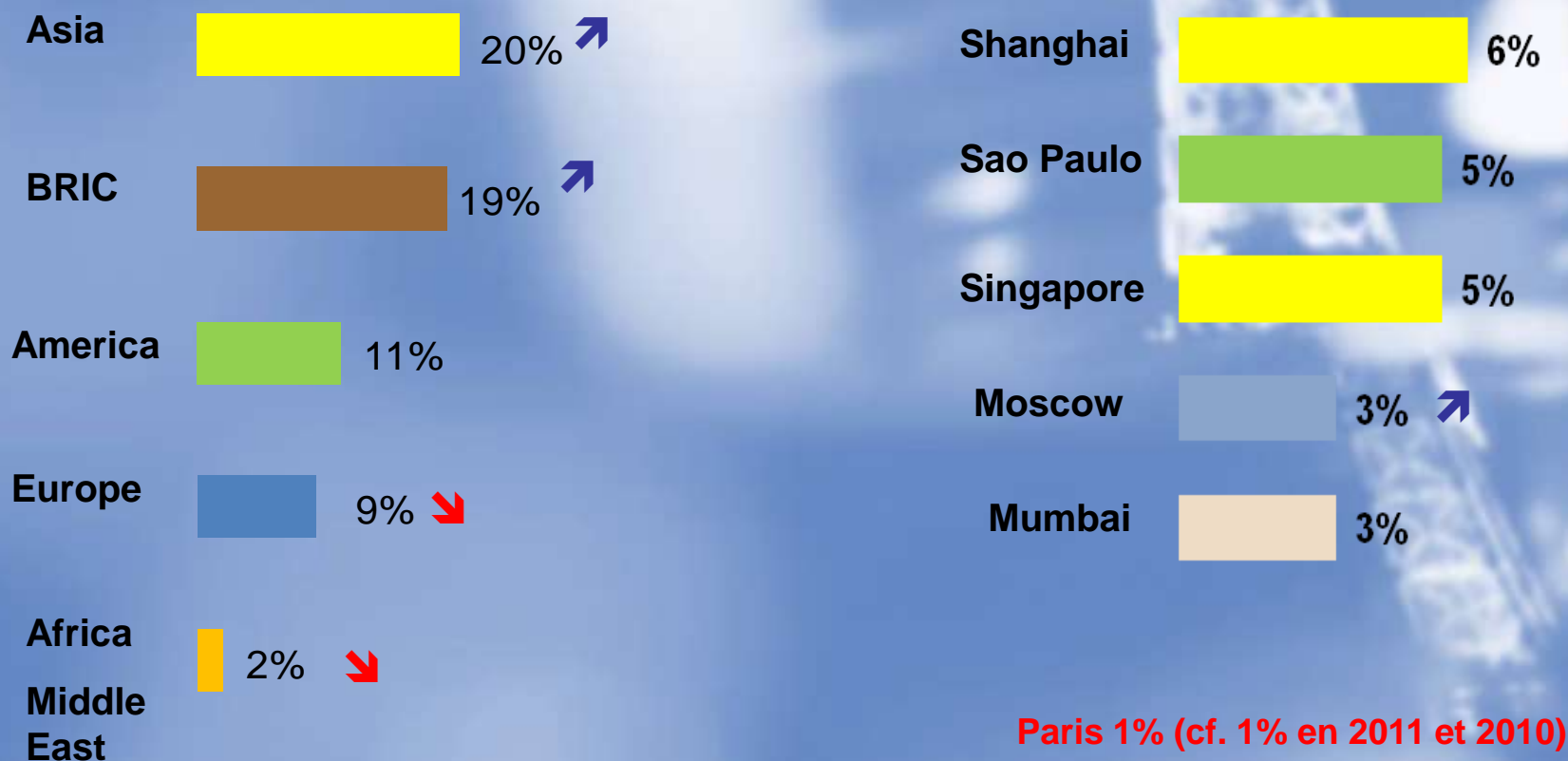


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COMPANIES' INVESTMENT PROJECTS



Paris 1% (cf. 1% en 2011 et 2010)

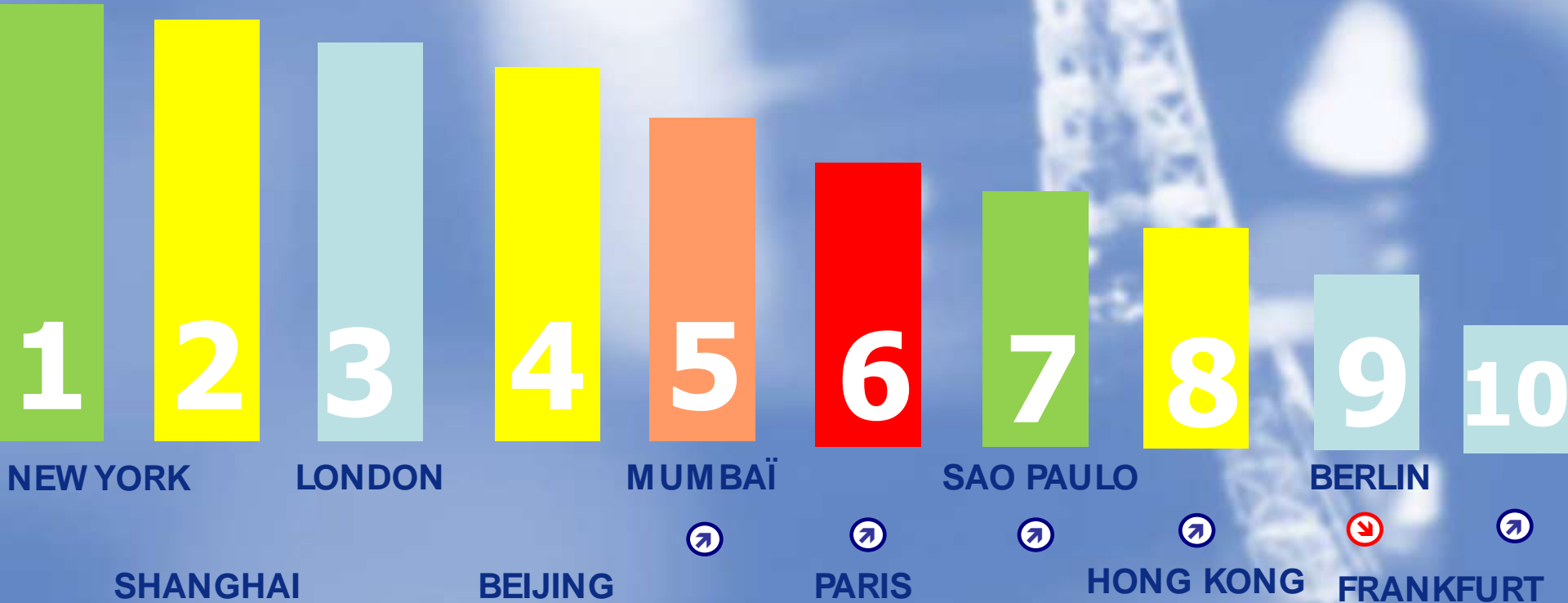


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GLOBAL RANKING – TOP 10





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Partie 2 – Réalités



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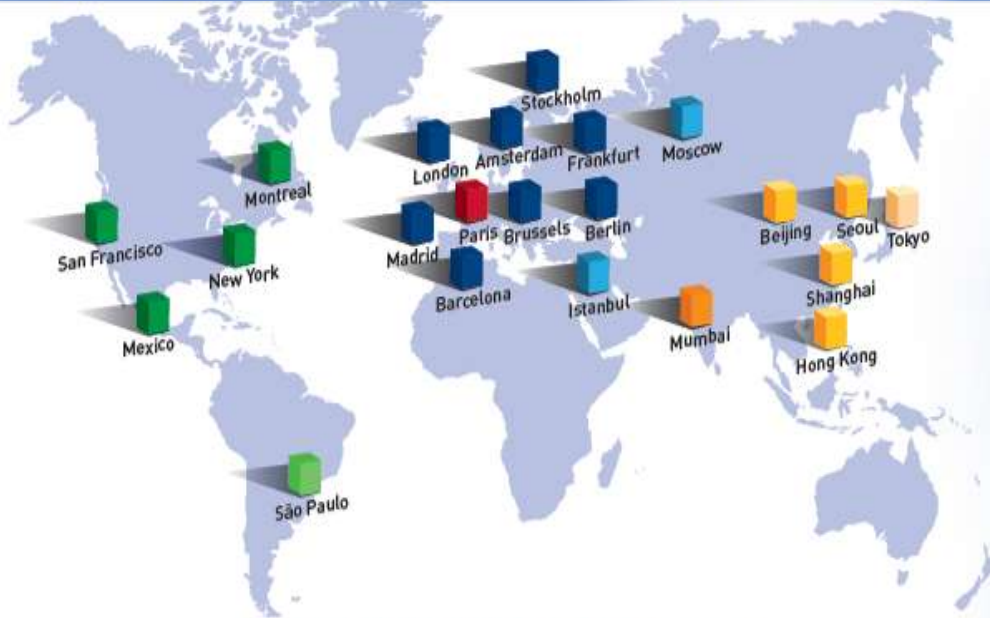


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Reality



METHODOLOGY



The annual period begins with the fourth quarter:



22 Global Cities

Selection criteria:

- The largest cities in terms of GDP
- The most open economies

The cities are distributed among the continents according to the zone's relative weight in international investments

Database :

"fDI markets" Financial Times, from January 2003

- 132,000 international investment projects
- 40,000 businesses all over the world
- 9,000 information sources: newspapers, magazines, associations, websites...

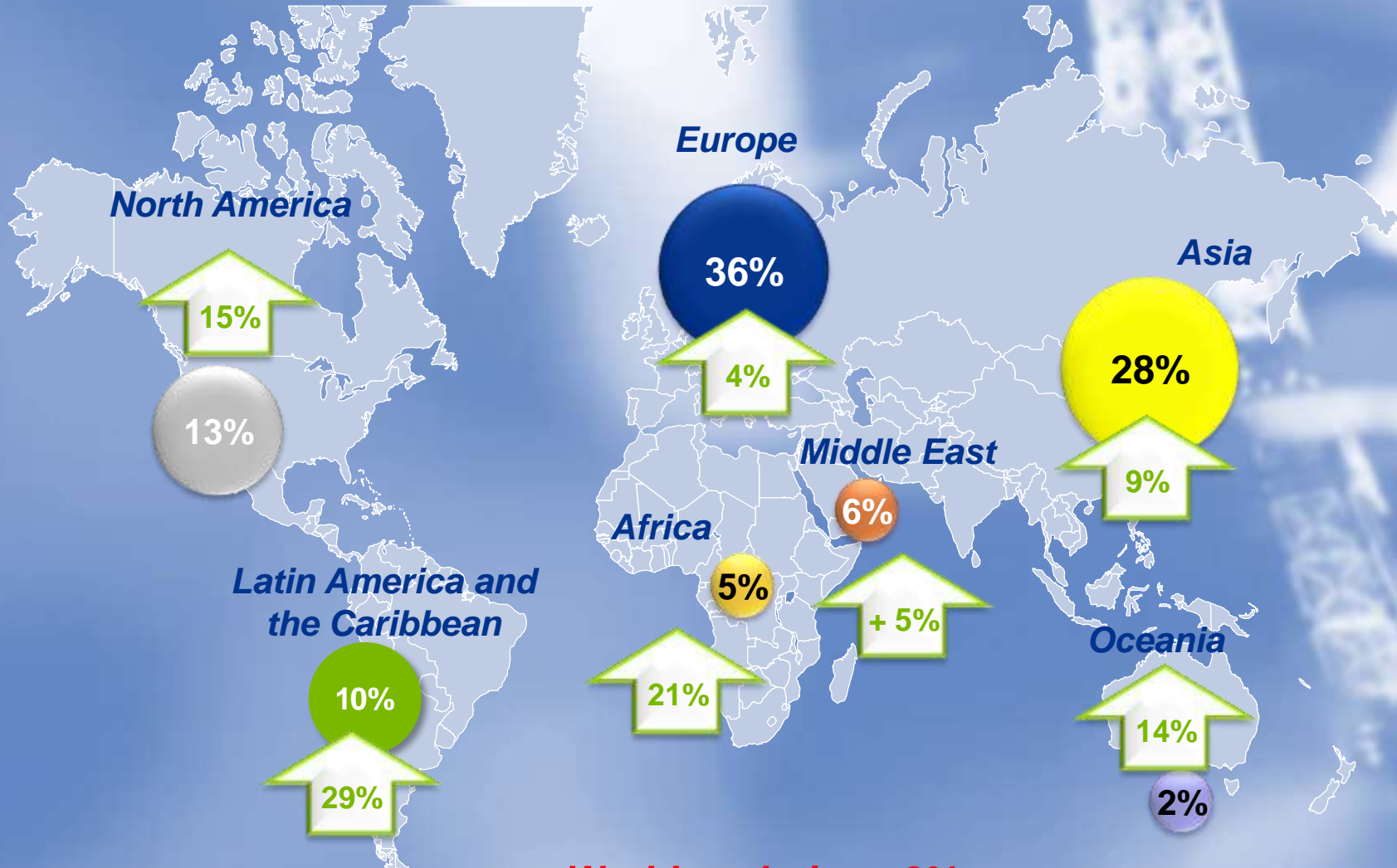


Reality

KPMG
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EUROPE: The most attractive continent in the world

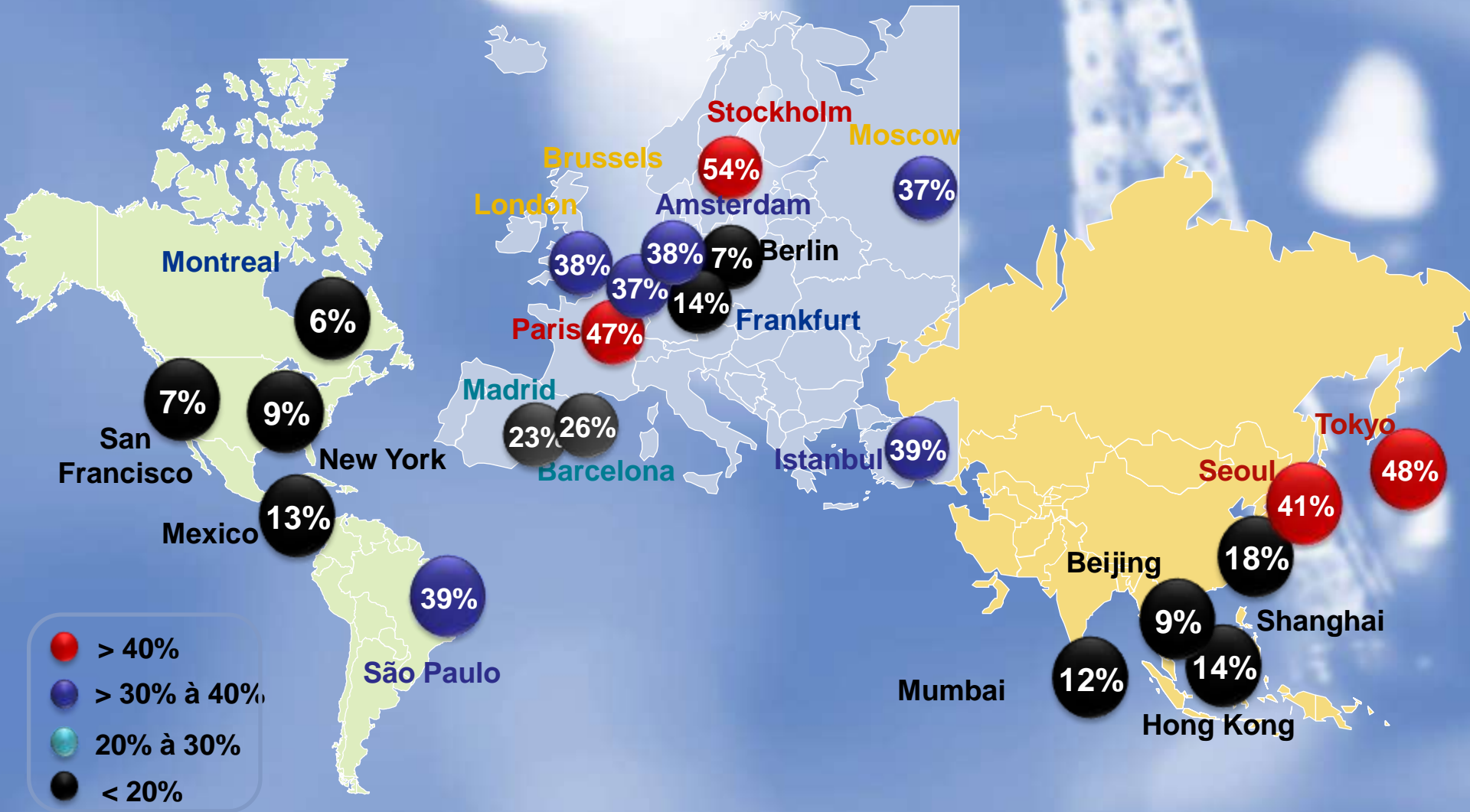
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World evolution : 9%



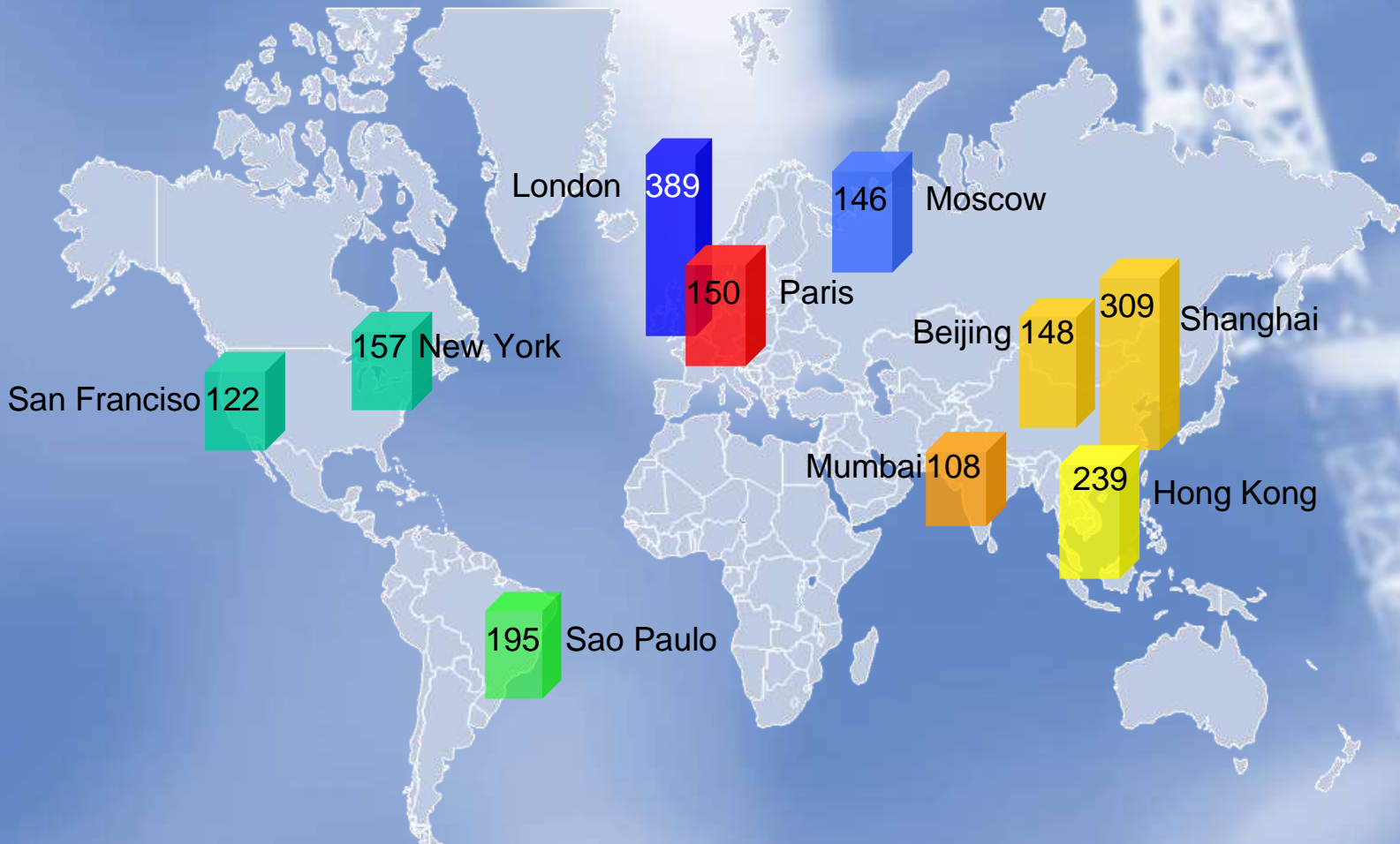
CITIES WEIGHT IN NATIONAL INCOMING INVESTMENTS





THE GLOBAL CITIES INVESTMENT MONITOR

Number of International Greenfield Investments in 2011



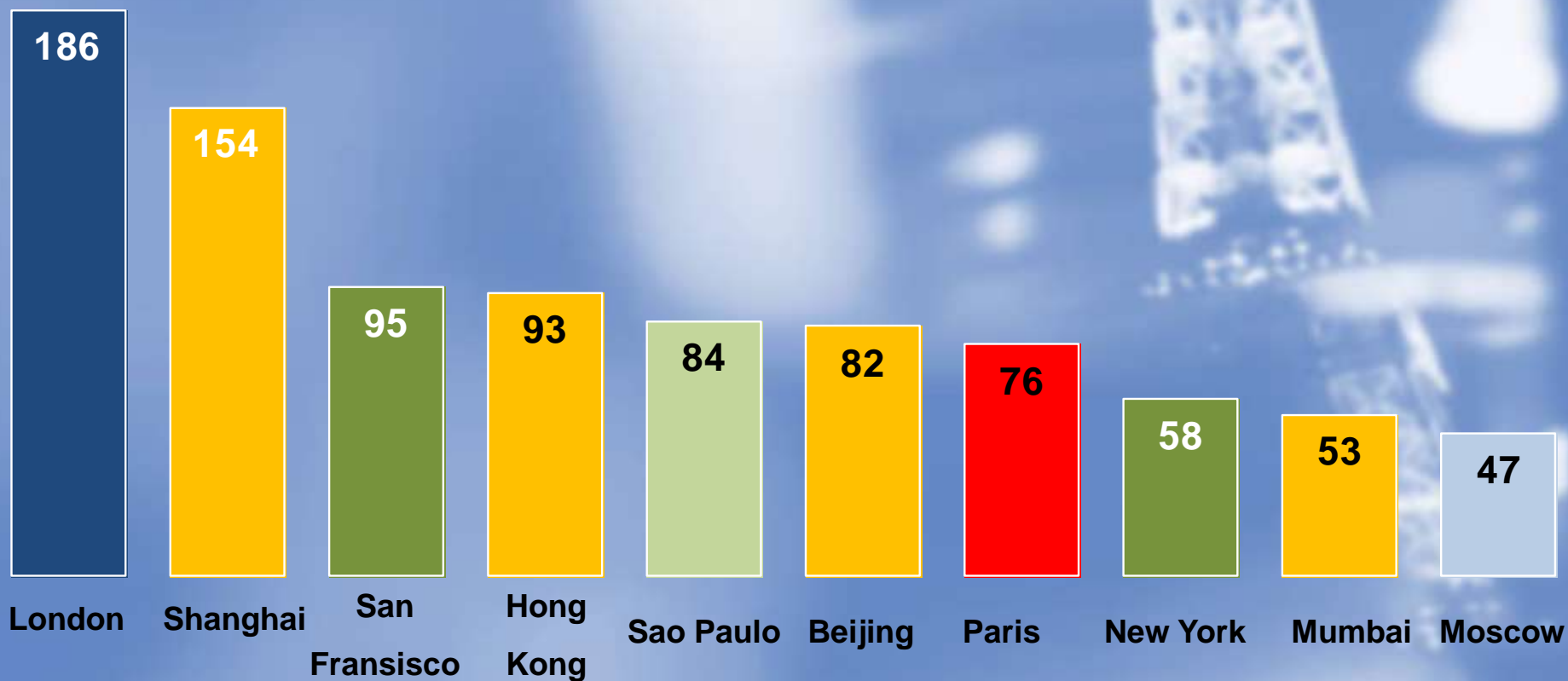


Reality



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STRATEGIC FONCTIONS : TOP10





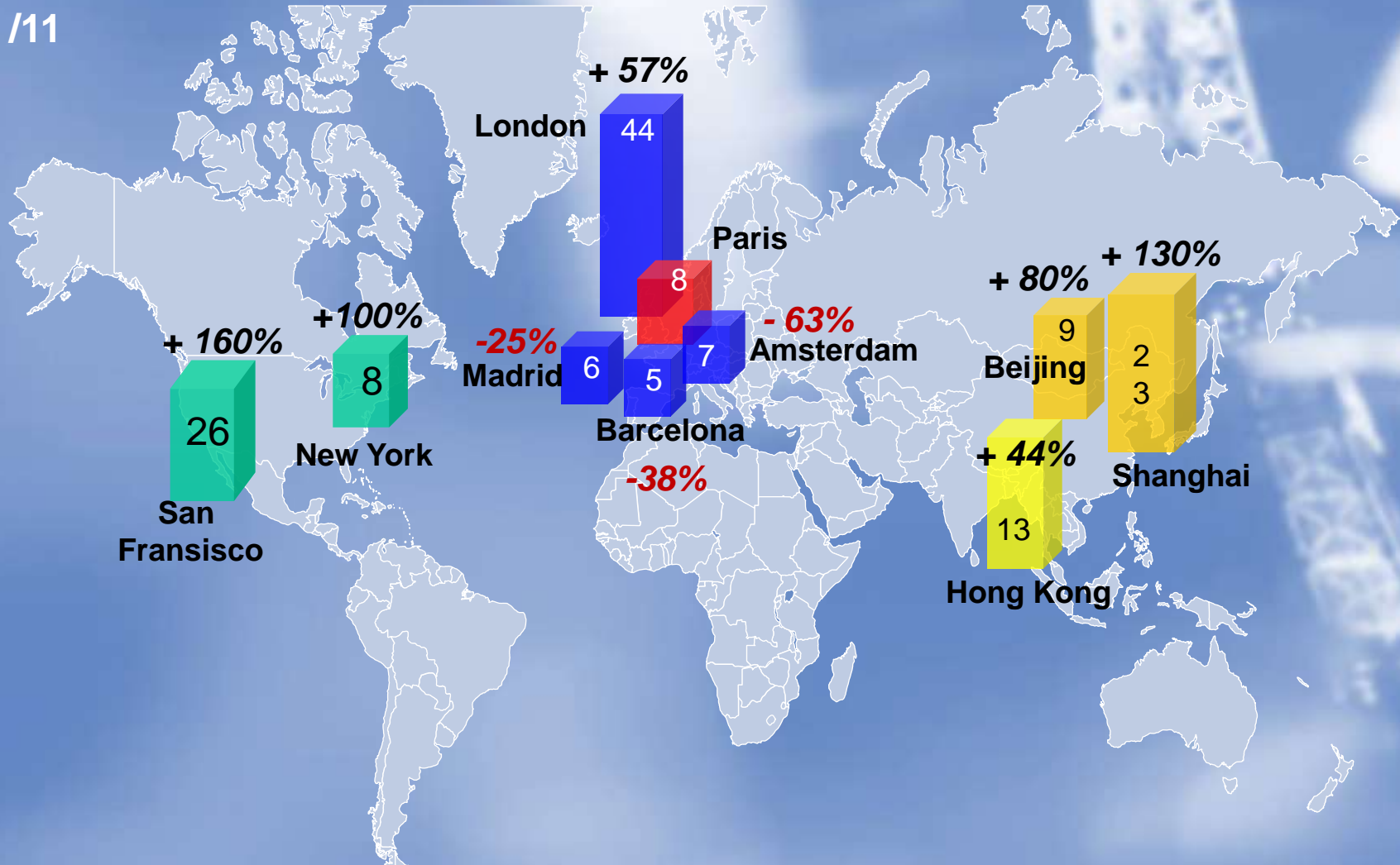
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Reality



HEADQUARTERS : TOP 10

Evol.
10 /11





Reality



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Evol.
10/11

RESEARCH CENTERS : TOP 10



Top 10

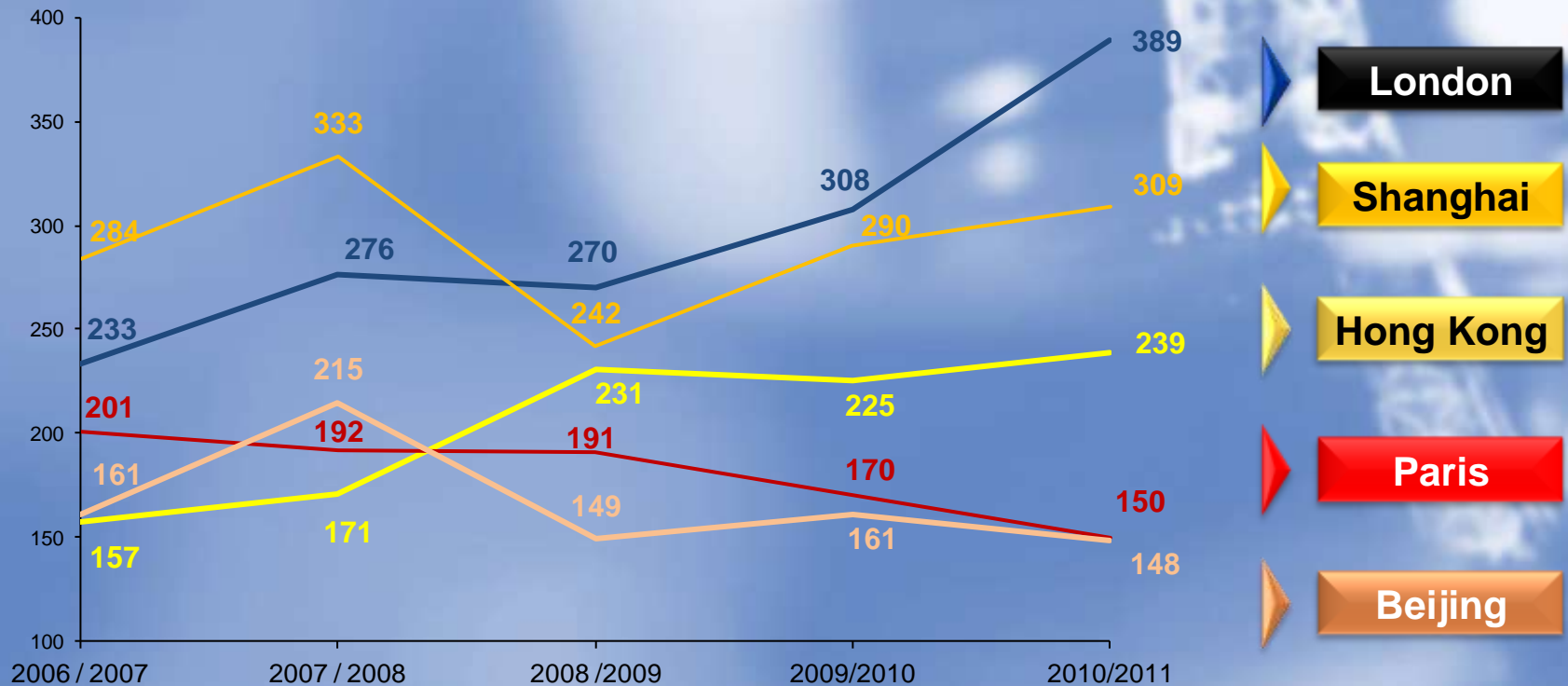


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Reality



TOP 5 CITIES EVOLUTION, 2007 TO 2011





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EVOLUTION 2007-2011





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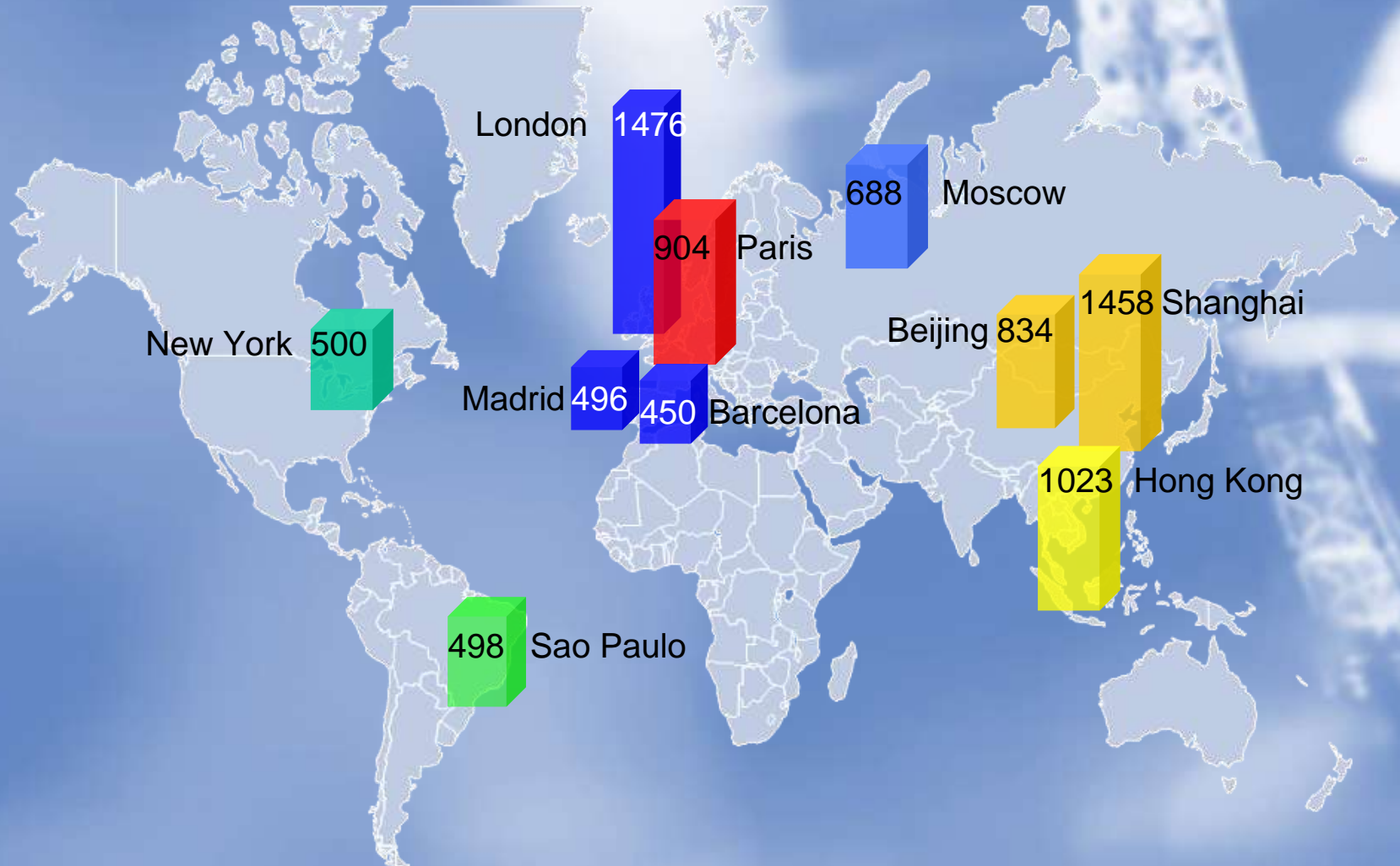
Reality



THE GLOBAL CITIES INVESTMENT MONITOR

2007-2011

Number of international Greenfields investments





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Commentaires de grands témoins



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