



GLOBAL CITIES INVESTMENT MONITOR 2019

NEW RANKINGS, TRENDS AND CRITERIA

GLOBAL CITIES, KEY PLAYERS IN THE GLOBAL ECONOMY

Global cities are attractive and stimulating environments where top decision-makers, talents and financiers join to produce business and social innovation. They are a global network of densely connected focal points, each intensely competing with the other to define the best economic and political standards.

Global Cities concentrate a disproportionate part of talents, businesses and capital. They are the places where most decisions are made, innovations launched, and people enabled. Global cities are to the world what cities are to a country. And then there are top global cities, where everyone expects the world of tomorrow to be shaped and where, as a result, world-changing moments actually happen.

The club of top global cities has opened and expanded far beyond the 20th century happy few. While Paris, London and New York have successfully reinvented themselves, and still possess unique brands, competition among global cities is more open than ever before.





Franck MARGAIN
Chairman,
Paris Region
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PARIS, GLOBAL LEADER

Paris has always been one of the most attractive regions in the world as a destination for international investment.

Yet, as the previous edition of Global Cities Investment Monitor forecast, Paris is once more one notch higher than last year, as N°2 globally. And the outlook, according to the investors surveyed, is this year again a positive one...

This success story is based on major assets.

Paris is the N°1 economic powerhouse in Europe and Europe is the N°1 destination and source of international investments in the world. Paris enjoys a unique global brand and is recognized as a top place for political stability, juridical security, quality of HR, infrastructure, market accessibility and size, quality of research and education and startup ecosystem.

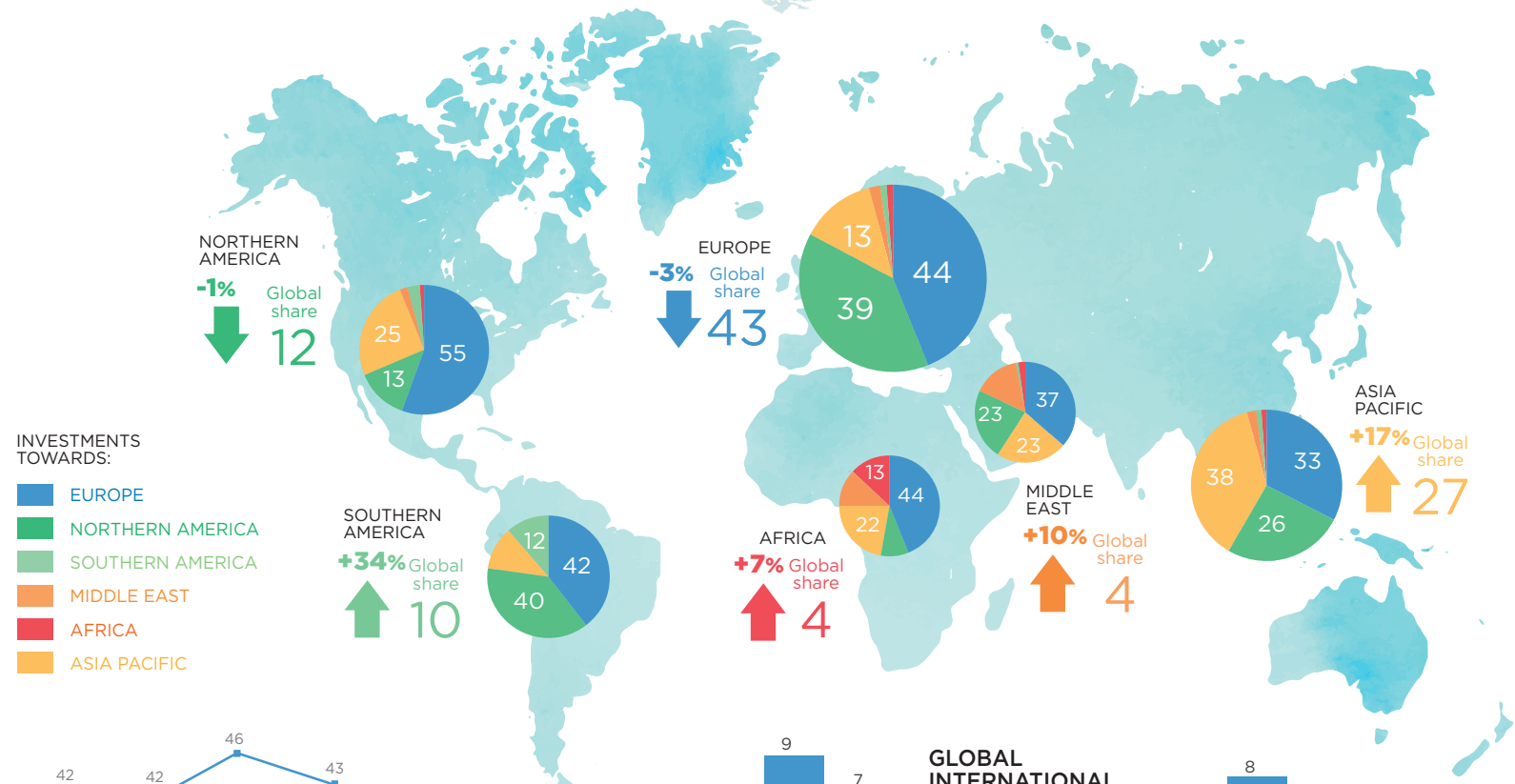
| | |
|---|----|
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GLOBAL DYNAMICS / EUROPE IS THE MAIN DESTINATION

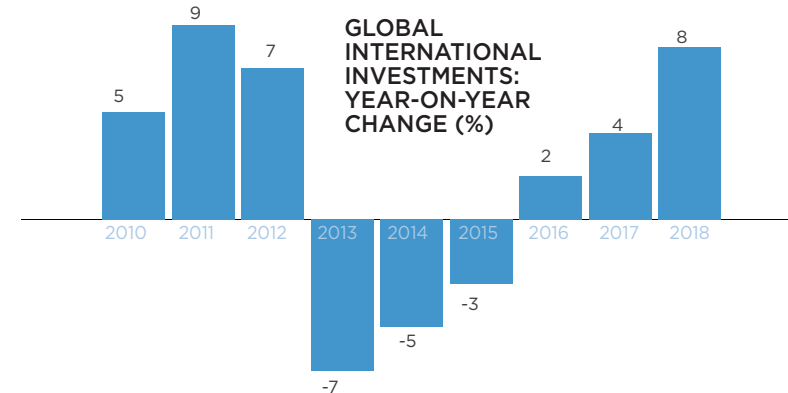
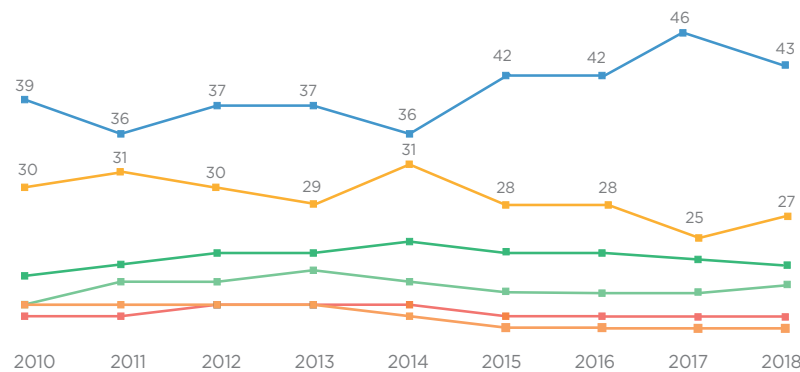
International investments' growth is accelerating for the fourth year in a row and reaches record levels in a decade that was initially marked by much more volatility. The global equilibrium is remarkably stable. Europe is both the first destination and the first source of international investments. The long-term trend indicates a growing gap with Asia-Pacific and Northern America. Regarding the destinations of investments, Europe is ahead with 43% of the total, against 27% and 12%, respectively for Asia-Pacific and Northern America. Regarding sources, the gap is even bigger: Europe accounts for 51% of the total, when Northern America yields 23% and Asia-Pacific 21% of the total.

2018: DESTINATIONS OF INTERNATIONAL INVESTMENTS (%)

% of total by world region and year-on-year variation for each region



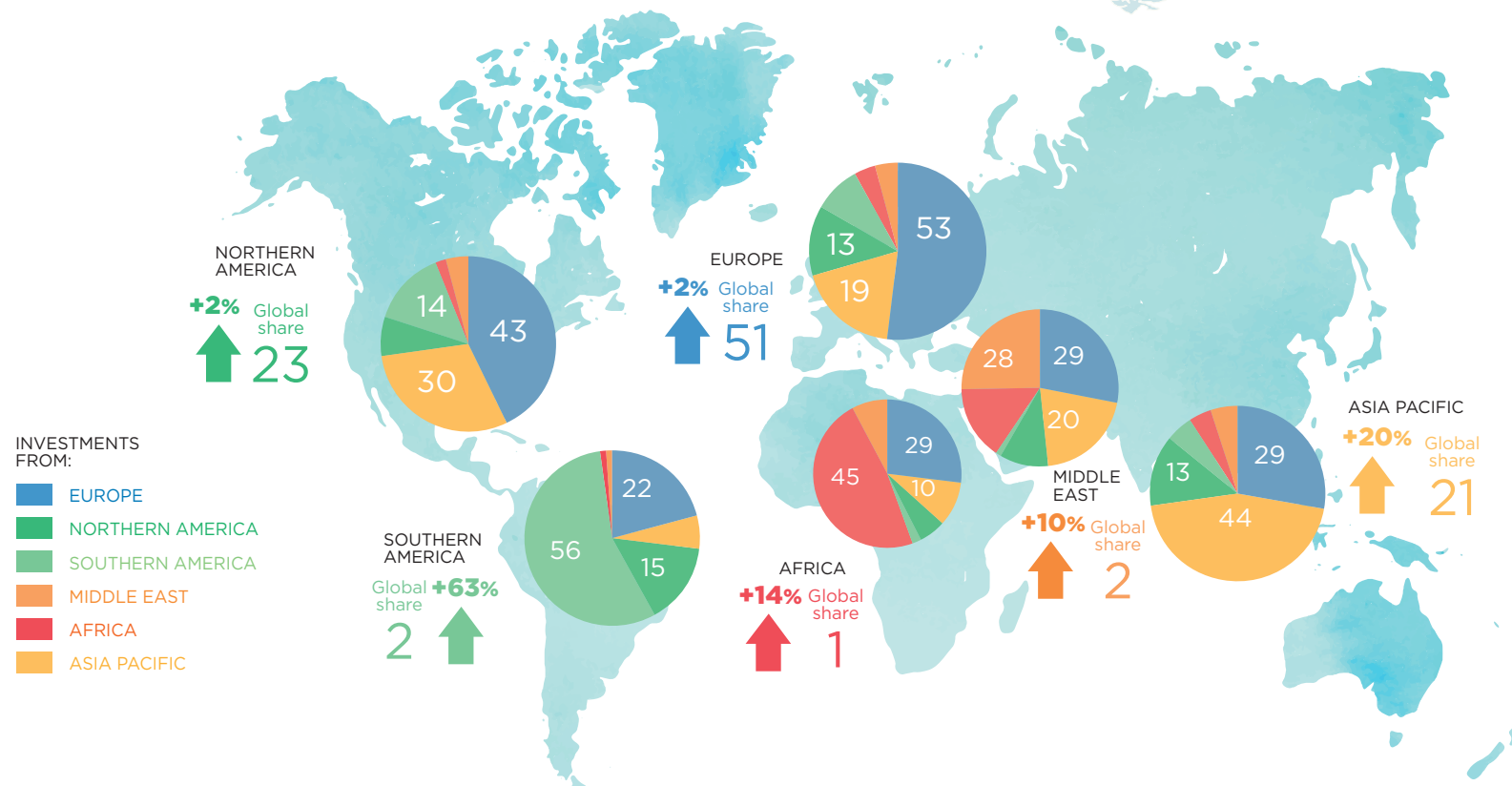
Source: FDI Markets Database



AND SOURCE OF INTERNATIONAL INVESTMENTS

2018: SOURCES OF INTERNATIONAL INVESTMENTS (%)

% of total by world region and year-on-year variation for each region

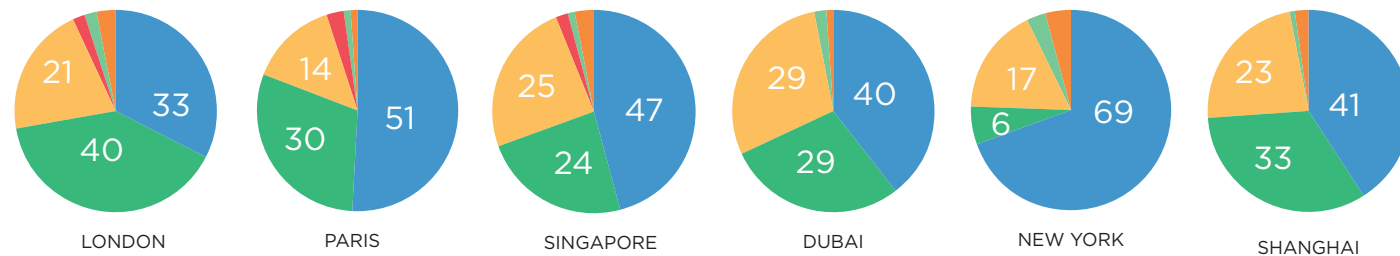


Top destinations for international investments are all highly diversified in terms of sources. Europe produces 51% of global investments in the world. Northern America and Asia-Pacific produce 23% and 21% of global investments respectively.

ORIGINS OF INTERNATIONAL INVESTMENTS IN TOP 6 GLOBAL CITIES*

Europe is the main investor in all the cities selected except in London, where Northern American investors prevail. Asian Investors are third in all the cities except for New York and Dubai.

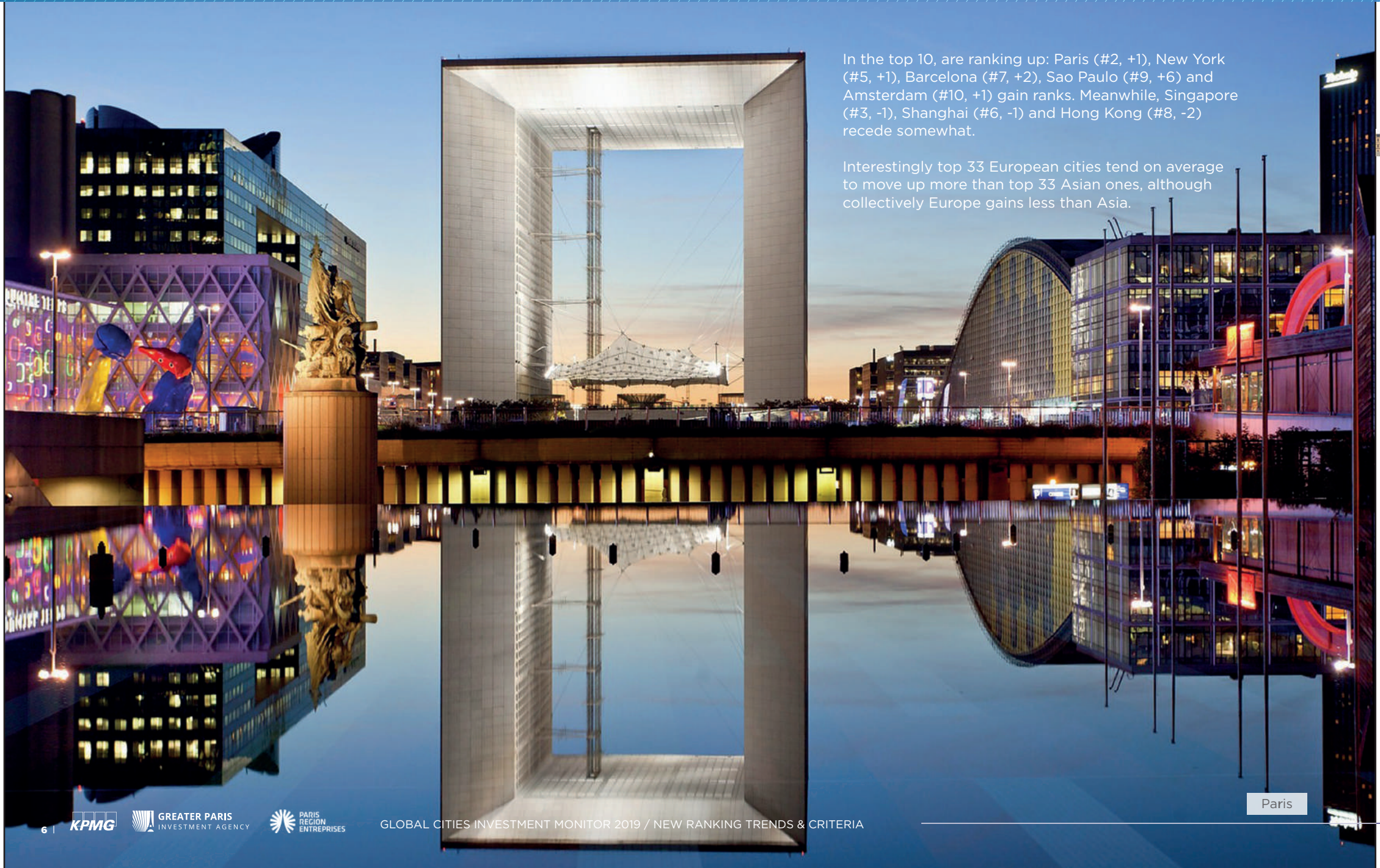
*Source: FDI Markets Database



THE MOST ATTRACTIVE GLOBAL CITIES

In the top 10, are ranking up: Paris (#2, +1), New York (#5, +1), Barcelona (#7, +2), Sao Paulo (#9, +6) and Amsterdam (#10, +1) gain ranks. Meanwhile, Singapore (#3, -1), Shanghai (#6, -1) and Hong Kong (#8, -2) recede somewhat.

Interestingly top 33 European cities tend on average to move up more than top 33 Asian ones, although collectively Europe gains less than Asia.



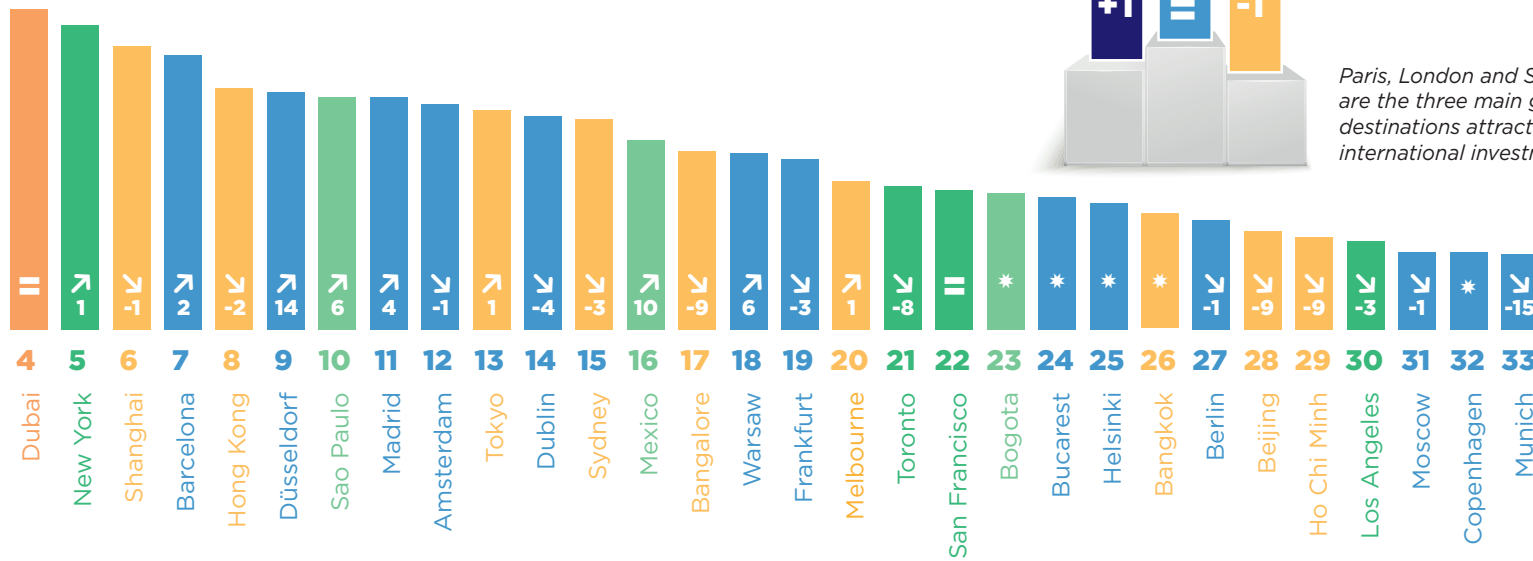
Paris

PARIS, LONDON AND SINGAPORE TOP THE RANKING*

AND IN 2018 THE 3 MOST ATTRACTIVE GLOBAL CITIES ARE...

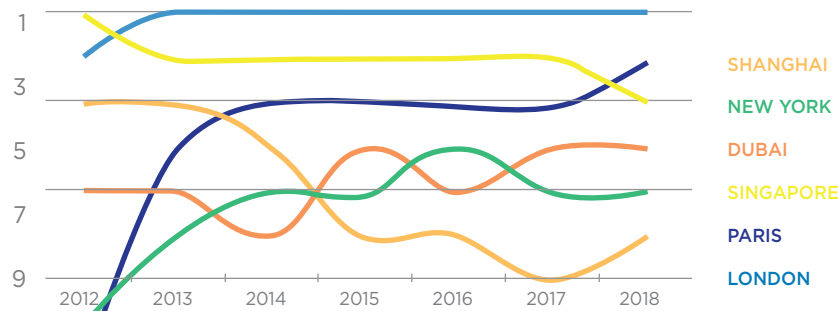


Paris, London and Singapore are the three main global destinations attracting international investments.



*not in top 33 in 2017

GLOBAL RANKING OF THE TOP 6 DESTINATIONS (%)



*Source: FDI Markets Database

THE MOST ATTRACTIVE GLOBAL CITIES FOR R&D / PARIS#1

FOCUS R&D

R&D International Investments represent 6% of global international investments.

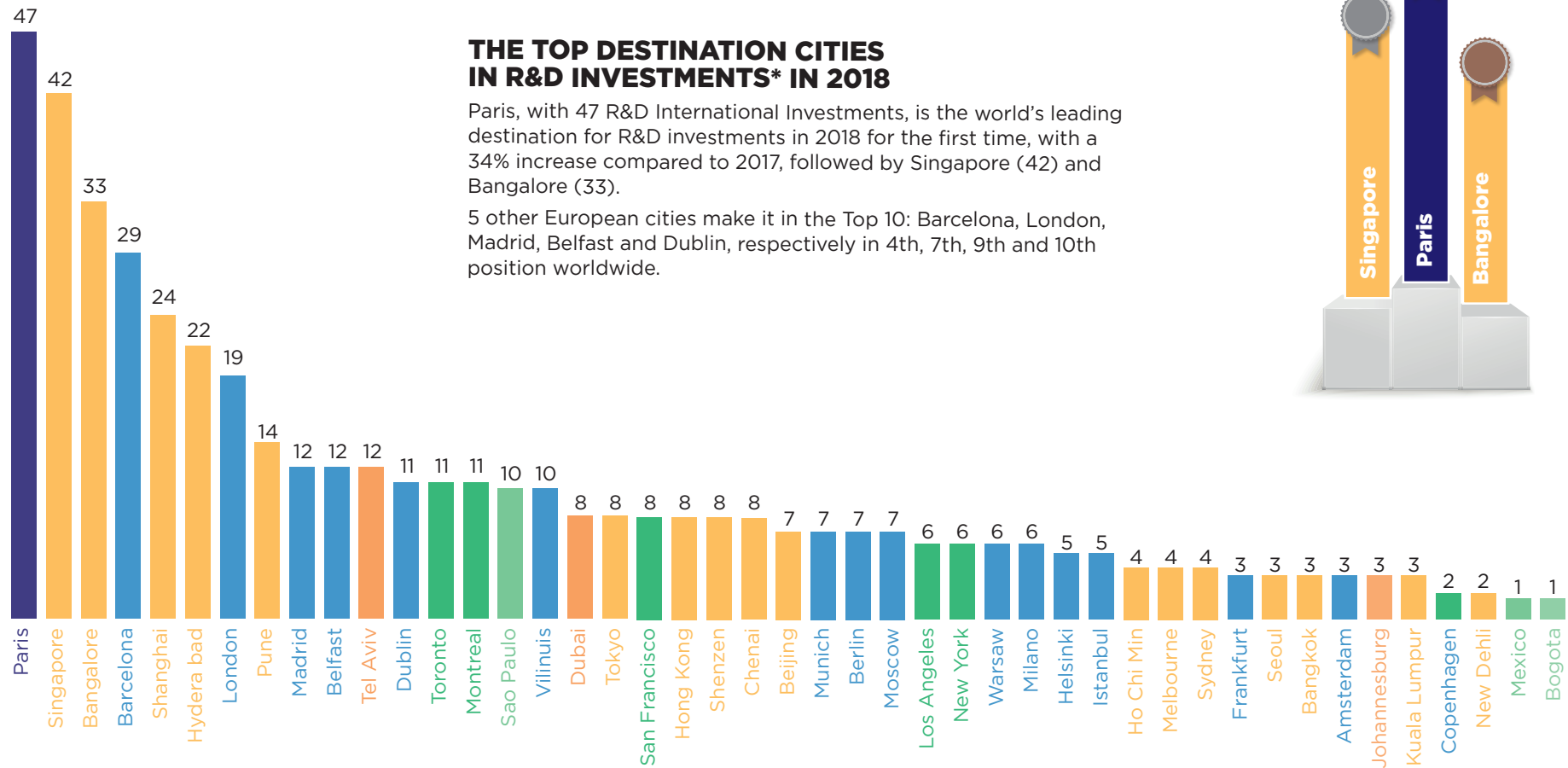
Western Europe is the leading world region regarding the R&D investments, followed by Asia Pacific. These two world regions represent 64% of all R&D investments in 2018.

This positive trend for Western Europe is mainly driven by France, the United Kingdom, Germany, Spain and Ireland, which together represent 76% of the R&D International Investments in 2018 in Western Europe.

From 2014 to 2018, Paris has always been the first destination of R&D centers in Western Europe, far ahead from the other capitals, and is now for the first time the world leading destination for R&D investments in 2018.

This section also includes data on the main sectors of R&D centers. Thus the "Software and IT services" sector is the leading R&D investment sector far ahead of all others.

As far as companies are concerned, IBM is the company that has established the most R&D centers in the world since 2003. The location of other companies' R&D centers in the world has more fluctuated in recent years.



Number of international investments in R&D in 2018.

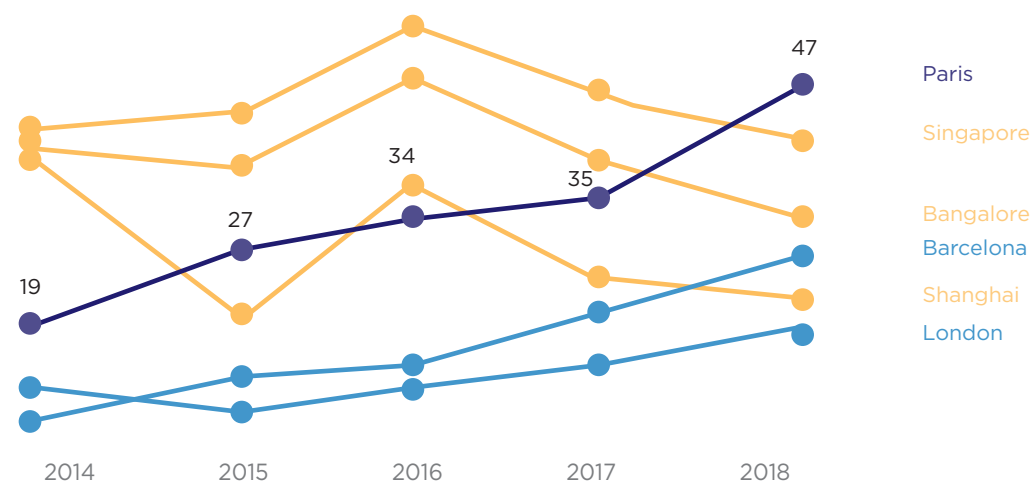
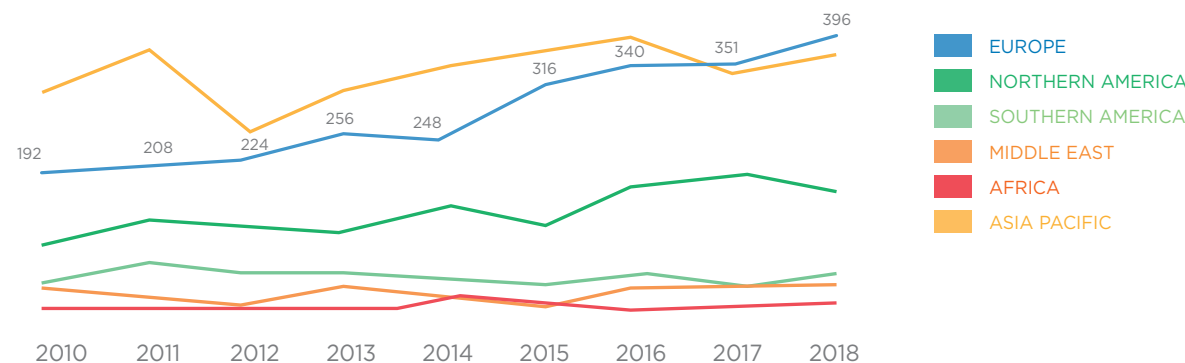
*Source: FDI Markets Database ; Business activities : research & development, design, development & testing

THE MOST ATTRACTIVE GLOBAL CITIES FOR R&D / PARIS#1

EVOLUTION OF WORLD REGIONS FOR R&D INVESTMENTS*

The flow of R&D International Investments in Western Europe doubled between 2010 and 2018, from 192 to 396. Western Europe took the 1st place over Asia in 2017, and confirmed its leading position in 2018 by concentrating 34% of R&D International Investments compared to 30% for Asia, respectively 396 R&D investments compared to 360 for Asia.

*Source: FDi Markets Database



With a boom of 147% between 2014 and 2018 and an evolution of 34% between 2017 and 2018, Paris becomes the world's leading destination for R&D centers.

Barcelona, the second European city in the ranking, is in fourth place. London comes in 6th place behind Shanghai. Singapore experienced a decrease of 9%, Bangalore 13% and Shanghai an increase of 4%. Barcelona, the second European city in the ranking, is in fourth place.

*Source: FDi Markets Database

TOP 20 COMPANIES INVESTING IN R&D* IN THE WORLD FROM 2004 TO 2018

| 2004>2008 | | | 2009>2013 | | | 2014>2018 | | |
|-----------|------------------------|-------|-----------|------------------------|-------|-----------|-----------------------|-------|
| CLASS | COMPANIES | TOTAL | CLASS | COMPANIES | TOTAL | CLASS | COMPANIES | TOTAL |
| 1 | IBM | 102 | 1 | IBM | 72 | 1 | IBM | 78 |
| 2 | MICROSOFT | 87 | 2 | MICROSOFT | 56 | 2 | HUAWEI | 67 |
| 3 | INTEL | 43 | 3 | GENERAL ELECTRIC | 46 | 3 | ROBERT BOSCH | 46 |
| 4 | SIEMENS | 43 | 4 | INTERTEK GROUP | 36 | 4 | SGS | 44 |
| 5 | MOTOROLA SOLUTIONS | 32 | 5 | HUAWEI | 34 | 5 | SIEMENS | 41 |
| 6 | HP | 31 | 6 | INTEL | 33 | 6 | ACCENTURE | 40 |
| 7 | SAP | 24 | 7 | HP | 32 | 7 | AMAZON.COM | 38 |
| 8 | SUN MICROSYSTEMS | 22 | 8 | DU PONT | 29 | 3 | GENERAL ELECTRIC | 35 |
| 9 | DU PONT | 22 | 9 | SIEMENS | 29 | 2 | MICROSOFT | 34 |
| 10 | GENERAL ELECTRIC | 21 | 10 | BAYER | 28 | 10 | SAMSUNG | 29 |
| 11 | ROBERT BOSCH | 21 | 11 | SAMSUNG | 24 | 11 | VOLKSWAGEN | 29 |
| 12 | SAMSUNG | 20 | 12 | SGS | 24 | 12 | ERICSSON | 27 |
| 13 | STMICROELECTRONICS | 20 | 13 | TATA GROUP | 21 | 13 | INTERTEK GROUP | 27 |
| 14 | GENERAL MOTORS (GM) | 20 | 14 | BASF | 20 | 14 | EUROFINS SCIENTIFIC | 25 |
| 15 | NOKIA | 20 | 15 | NESTLE | 19 | 15 | CONTINENTAL | 25 |
| 16 | ALCATEL | 20 | 16 | AIRBUS GROUP (EUROP..) | 18 | 16 | INTEL | 24 |
| 17 | ERICSSON | 19 | 17 | BLACKBERRY (RESEARC..) | 17 | 17 | BAYER | 23 |
| 18 | INFINEON TECHNO. | 19 | 18 | CISCO SYSTEMS | 17 | 18 | APPLE INC | 21 |
| 19 | PFIZER | 18 | 19 | NOKIA | 16 | 19 | MERCK KGAA | 21 |
| 20 | MAHINDRA SATYAM (SA..) | 17 | 20 | ROBERT BOSCH | 16 | 20 | ALPHABET INC (GOOGLE) | 20 |

*Source: FDI Markets Database

THE MOST ATTRACTIVE GLOBAL CITIES FOR R&D / PARIS#1

EVOLUTION OVER A 5 YEAR PERIOD OF INVESTMENTS* IN THE TOP 10 SECTORS BETWEEN 2004-2018

Companies mainly invest in R&D centers in the "Software and IT services" sector. It represents 35% of R&D investments in the world for the period 2014-2018. Semiconductors and biotechs disappeared from the ranking.

The pharmaceutical industry also plummeted from 4th place to 7th position. But there is a greater internationalization of R&D in the automotive sector and in the food and tobacco sector.

*Source: FDi Markets Database

| 2004>2008 | | | | 2009>2013 | | | | 2014>2018 | | | |
|-----------|-----------------------|------|----|-----------|-----------------------|------|----|-----------|-----------------------|------|----|
| CLASS | SECTOR | FDI | % | CLASS | SECTOR | FDI | % | CLASS | SECTOR | FDI | % |
| 1 | SOFTWARE & IT SERVICE | 1273 | 33 | 1 | SOFTWARE & IT SERVICE | 1091 | 27 | 1 | SOFTWARE & IT SERVICE | 1855 | 35 |
| 2 | COMMUNICATIONS | 388 | 10 | 2 | COMMUNICATIONS | 369 | 9 | 2 | COMMUNICATIONS | 450 | 9 |
| 3 | SEMICONDUCTORS | 319 | 8 | 3 | CHEMICALS | 302 | 4 | 3 | CHEMICALS | 301 | 6 |
| 4 | PHARMACEUTICAL | 313 | 8 | 4 | INDUSTRIAL EQUIPMENT | 236 | 5 | 4 | BUSINESS SERVICES | 294 | 6 |
| 5 | INDUSTRIAL EQUIPMENT | 175 | 5 | 5 | PHARMACEUTICAL | 228 | 8 | 5 | INDUSTRIAL EQUIPMENT | 293 | 6 |
| 6 | CHEMICALS | 172 | 4 | 6 | BUSINESS SERVICES | 202 | 4 | 6 | AUTOMOTIVE COMPONENTS | 249 | 5 |
| 7 | AUTOMOTIVE COMPONENTS | 164 | 4 | 7 | AUTOMOTIVE COMPONENTS | 175 | 4 | 7 | PHARMACEUTICAL | 203 | 4 |
| 8 | ELECTRONIC COMPONENTS | 114 | 3 | 8 | ELECTRONIC COMPONENTS | 173 | 3 | 8 | FOOD AND TOBACCO | 181 | 3 |
| 9 | BIOTECHNOLOGY | 109 | 3 | 9 | SEMICONDUCTORS | 150 | 8 | 9 | ELECTRONIC COMPONENTS | 159 | 3 |
| 10 | AUTOMOTIVE OEM | 103 | 3 | 10 | FOOD AND TOBACCO | 128 | 3 | 10 | AUTOMOTIVE OEM | 158 | 3 |

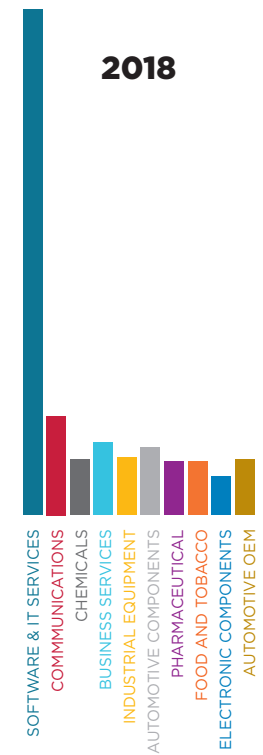
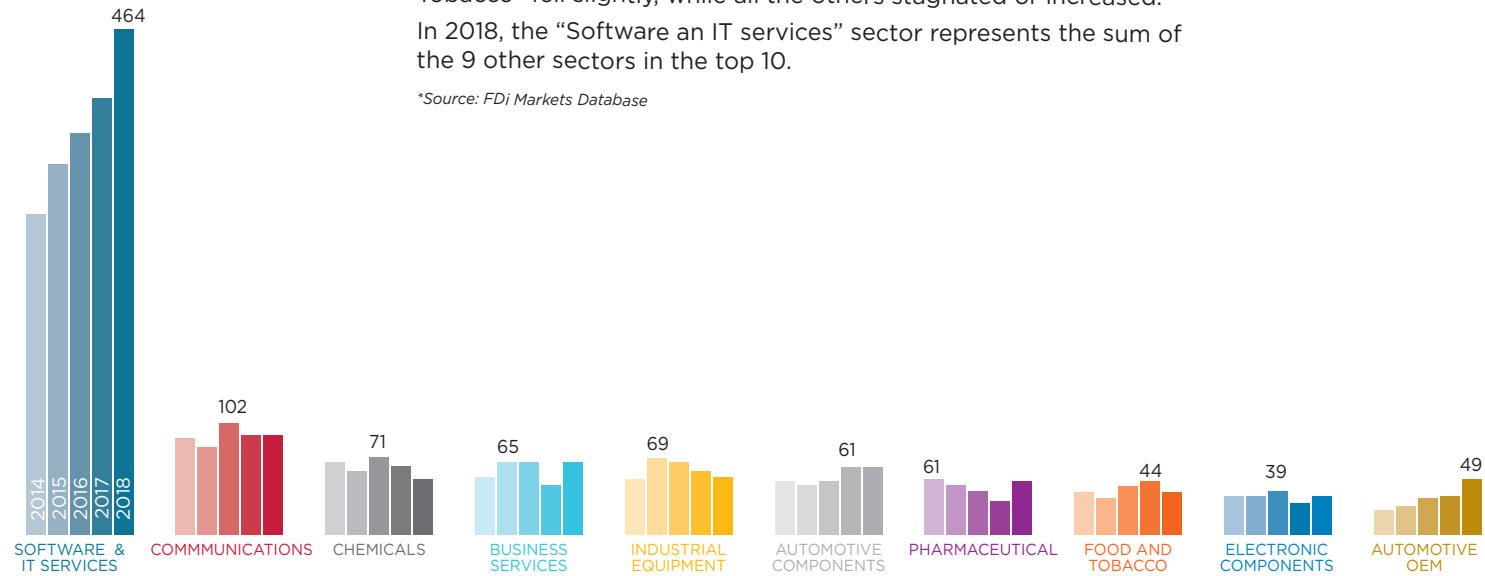
THE SECTORS OF R&D INTERNATIONAL INVESTMENTS* IN THE WORLD BETWEEN 2014 AND 2018

The two sectors "Software and IT services" and "OEM Automotive" are the ones that have been constantly evolving through the years." Between 2014 and 2018, the "Software and services" sector grew by 70%. from 294 FDIs to 464 FDIs.

Between 2017 and 2018, the sectors "Chemicals" and "Food and Tobacco" fell slightly, while all the others stagnated or increased.

In 2018, the "Software an IT services" sector represents the sum of the 9 other sectors in the top 10.

*Source: FDI Markets Database



INVESTORS' PERCEPTIONS OF GLOBAL CITIES

The global image is a very strong and generally quite stable component of the perceptions associated by international investors to global cities. As a result, the hierarchy of global image is particularly stable, especially for top cities. Like in previous editions of this study, Paris leads in continental Europe and Paris, New York and London top the list for the tenth year running.

San Francisco and Beijing move exceptionally fast up the ladder (+5 & +11 ranks respectively). Berlin, Los Angeles and Hong Kong also gain ranks.

Source: FDI Markets Database

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

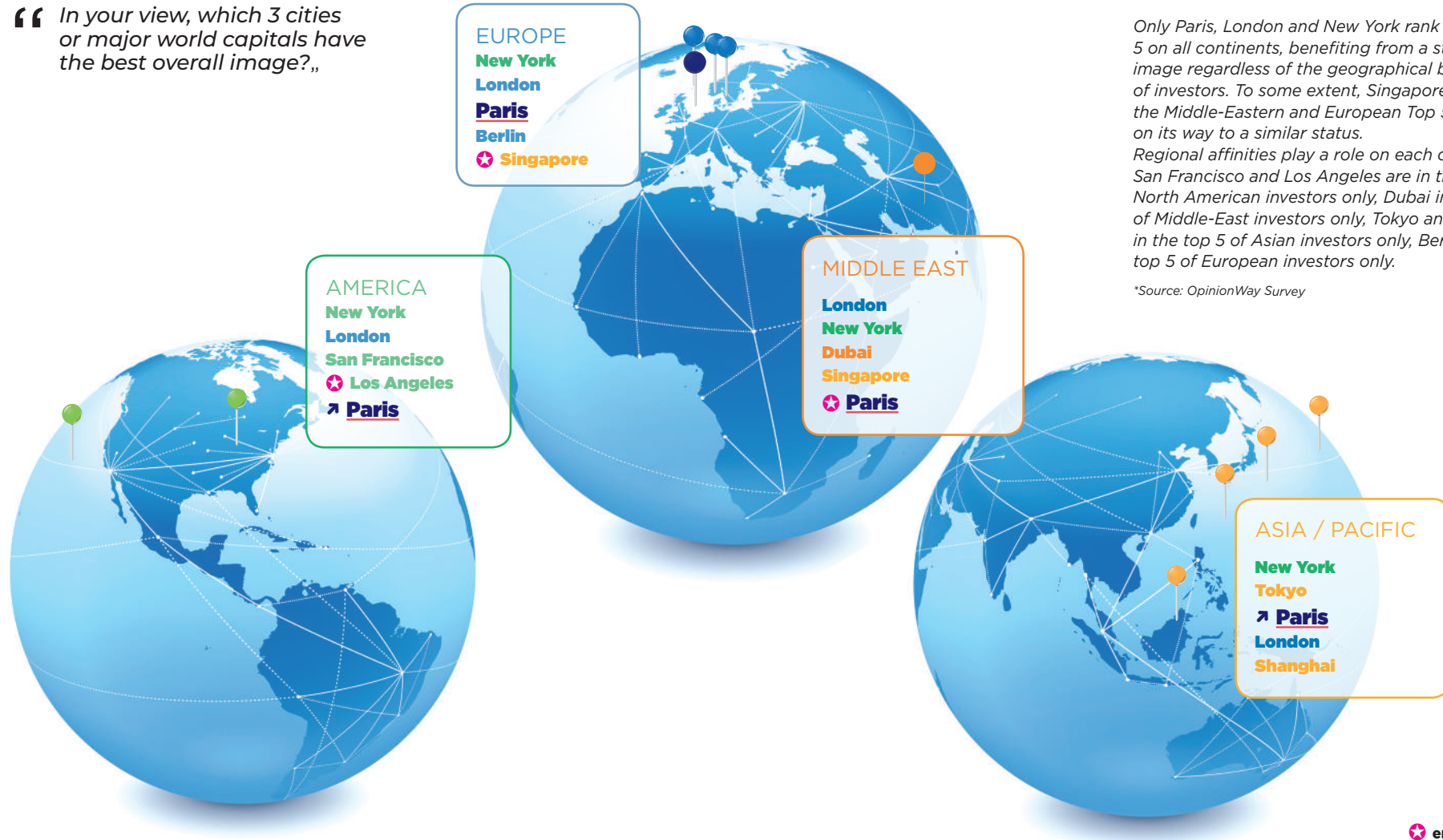
Percentage of quotations by city

| | | |
|----|----------------------|------------|
| 1 | New York | 52% |
| 2 | London | 32% |
| 3 | Paris | 25% |
| 4 | San Francisco | 12% |
| 5 | Tokyo | 11% |
| 5 | Singapore | 11% |
| 5 | Berlin | 9% |
| 8 | Los Angeles | 9% |
| 9 | Beijing | 9% |
| 10 | Hong Kong | 7% |
| 10 | Frankfurt | 7% |
| 12 | Chicago | 6% |
| 12 | Shanghai | 6% |
| 12 | Madrid | 5% |
| 12 | Dubai | 5% |
| 12 | Toronto | 5% |
| 12 | Bangkok | 5% |
| 12 | Sydney | 5% |
| 20 | Amsterdam | 4% |
| 20 | Stockholm | 4% |

New York

CITIES' REGIONAL IMAGES*

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



Only Paris, London and New York rank in the Top 5 on all continents, benefiting from a strong brand image regardless of the geographical background of investors. To some extent, Singapore, present in the Middle-Eastern and European Top 5 might be on its way to a similar status. Regional affinities play a role on each continent: San Francisco and Los Angeles are in the Top 5 of North American investors only, Dubai in the top 5 of Middle-East investors only, Tokyo and Shanghai in the top 5 of Asian investors only, Berlin in the top 5 of European investors only.

*Source: OpinionWay Survey

★ enter the top 5

INVESTORS' PERCEPTIONS OF GLOBAL CITIES

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)? „

Percentage of quotations by city

| | | |
|----|------------------|-----|
| 1 | New York | 32% |
| 2 | Paris | 17% |
| 3 | London | 13% |
| 4 | Shanghai | 11% |
| 4 | Singapore | 11% |
| 6 | Beijing | 10% |
| 7 | Los Angeles | 9% |
| 8 | Hong Kong | 8% |
| 9 | Tokyo | 7% |
| 9 | Berlin | 7% |
| 11 | San Francisco | 6% |
| 12 | Madrid | 5% |
| 10 | Milan | 5% |
| 10 | Frankfurt | 5% |
| 12 | Bangkok | 5% |
| 15 | Hanoi | 4% |
| 15 | Sydney | 4% |
| 15 | Stockholm | 4% |
| 19 | Atlanta | 3% |
| 20 | Chicago | 3% |

When asked to consider specifically the global attractiveness to set up a business, the international investors rank among rising stars of the top 10: Paris (#2, +2), Singapore (#5, +5) and Los Angeles (#7, enters top 10) and Tokyo (#9, +1). On the other hand, London (#3, -1), Shanghai (#4, -1), Hong Kong (#8, -2) and Berlin (#10, -5) rank among the global cities which are perceived as less attractive than last year.

*Source: OpinionWay Survey



Paris



“ According to you, which city will the most increase attractiveness in the next 3 years?.,”

| | |
|--------------|----------|
| Paris | 1 |
| SHANGHAI | 2 |
| NEW YORK | 3 |
| LONDON | 4 |
| TOKYO | 5 |
| BANGALORE | 6 |
| SAO PAULO | 7 |
| FRANKFURT | 8 |
| MADRID | 9 |
| SINGAPORE | 10 |
| BEIJING | 11 |
| CHICAGO | 12 |
| MEXICO | 13 |
| MUMBAI | 14 |
| NEW DELHI | 15 |
| BANGKOK | 16 |
| BARCELONA | 17 |
| LOS ANGELES | 18 |
| WARSAW | 19 |
| HONG KONG | 20 |

*Source: OpinionWay Survey

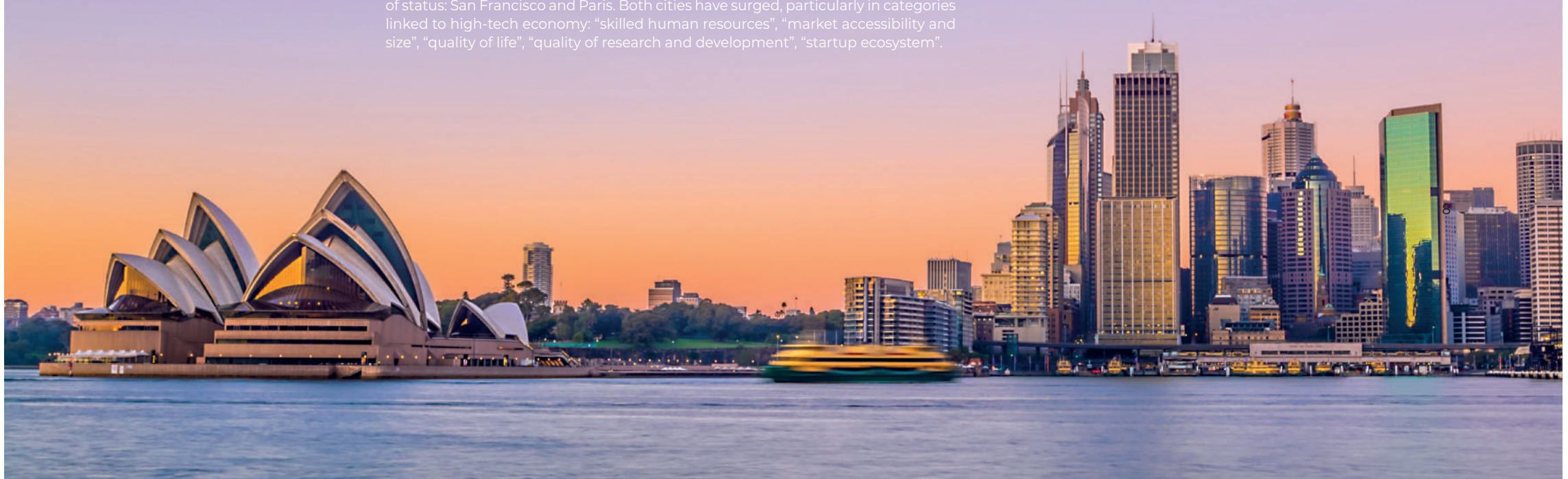
INVESTORS' CRITERIA

Investors seek to select the best opportunities, combining the highest returns with the lowest risks. As a result, fundamentals matter when selecting a place to invest. Building the sort of economic and political environment that makes a truly global city is a rare achievement and the global city a rare commodity.

Political stability and juridical security are probably the most difficult to achieve, yet they are the first criterion for investors. Availability of skilled RH, infrastructure, market accessibility and size and economic growth come next. Living costs, quality of education, quality of life, quality of R&D, and startup ecosystem are a less often quoted, yet this does not mean that they are not often decisive means of differentiation in the competition between global cities.

A city's brand matters, even when it comes to analyzing a city's attractiveness, criterion by criterion. This is why a few cities are disproportionately quoted on each criterion. A city's brand is a strong asset, and changing it a daunting affair for promoters and investors alike.

Among the global cities which have recently experienced a quite dramatic change of status: San Francisco and Paris. Both cities have surged, particularly in categories linked to high-tech economy: "skilled human resources", "market accessibility and size", "quality of life", "quality of research and development", "startup ecosystem".

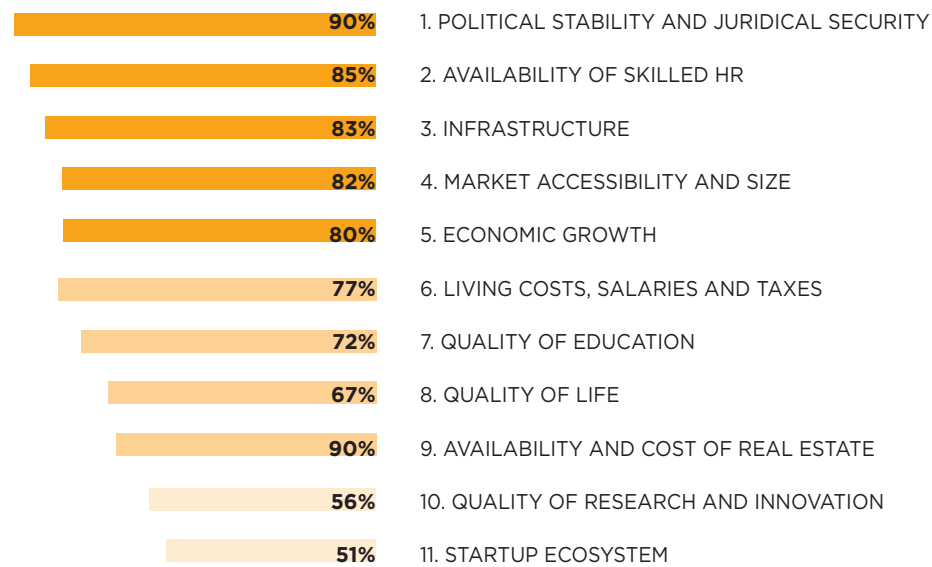


Sydney

TOP CITIES' RANKING BY INVESTMENT CRITERIA



“ In your view, which of the following investment criteria are the most important when choosing your location? „



“ According to you, regarding every investment criterion, which city is generally the most attractive for business and company location? „

Paris RANKING

| | 1 | 2 | 3 | 4 | 5 | 5 | 2019 | 2018 |
|--------------|---------------|---------------|---------------|-----------|---------------|---------------|------|------|
| | New York | Tokyo | Paris | London | Berlin | Zürich | 3↑ | 7 |
| | New York | Paris | San Francisco | London | Madrid | Tokyo | 2↑ | 7 |
| | New York | London | Tokyo | Frankfurt | San Francisco | Paris | 6 | 4 |
| | New York | Shanghai | Beijing | London | Paris | San Francisco | 5↑ | 15 |
| | Shanghai | New York | Beijing | Singapore | Mumbai | Bangaluru | - | - |
| | New York | Madrid | Shanghai | Dublin | London | Tokyo | - | - |
| | New York | London | Tokyo | Shanghai | Boston | Berlin | 7 | 5 |
| | New York | Paris | San Francisco | Amsterdam | London | Barcelona | 2 | 2 |
| | London | New York | Madrid | Warsaw | Paris | Toronto | 5 | 4 |
| | New York | San Francisco | Paris | London | Los Angeles | Singapore | 3↑ | 6 |
| | San Francisco | London | New York | Paris | Singapore | Beijing | 4 | 4 |
| TOTAL | New York | San Francisco | London | Paris | Shanghai | Tokyo | 4↑ | 5 |

*Source: OpinionWay Survey

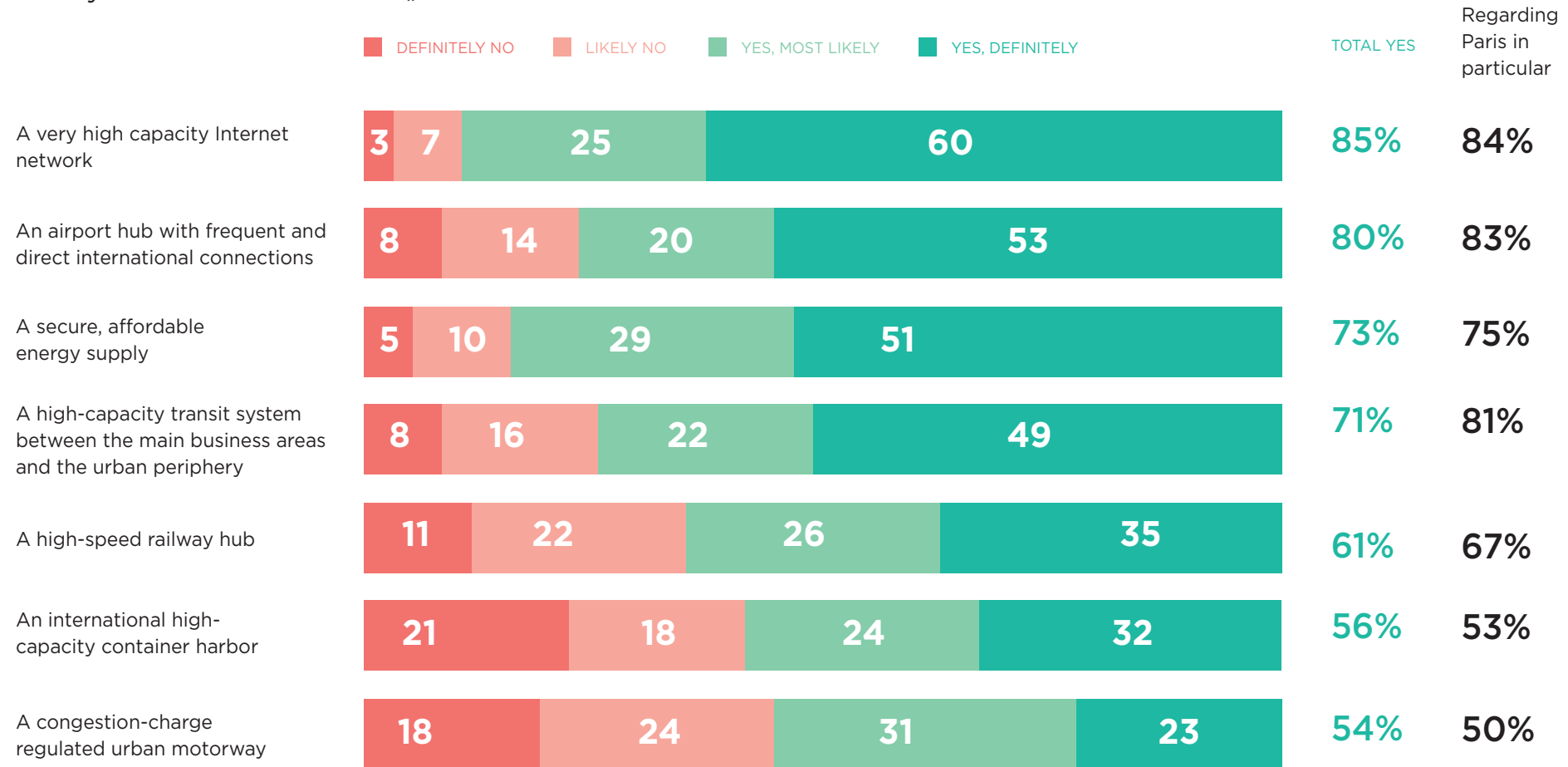
INVESTORS' CRITERIA: FOCUS ON INFRASTRUCTURE

Infrastructure is a costly but very-long-term asset. This focus on infrastructure as an investment criterion captures the twenty-first century hierarchy in infrastructure as an economic enabler. Motorways are bottom of the league while a very-high capacity internet network is the most valued asset.

Among the other top items: an airport hub with frequent and direct international connections and a secure, affordable energy supply.

A high-capacity transit system might be less regarded as a differentiator (although it is clearly prized in some cases, like Paris) while a high-speed railway hub and a high-capacity container harbor are probably lagging due to their more specific impact in terms of investments.

“ According to you, which infrastructure is key to an investment decision?,”



*Source: OpinionWay Survey

FOCUS ON PARIS

POSITIVE LOOKOUT FOR A TOP GLOBAL CITY

In 2018, Paris was once more a top global city for international investments. In 2019 investors' perceptions are even more favorable since they rank Paris N°1 among the cities that will see their attractiveness increase the most in the next three years.

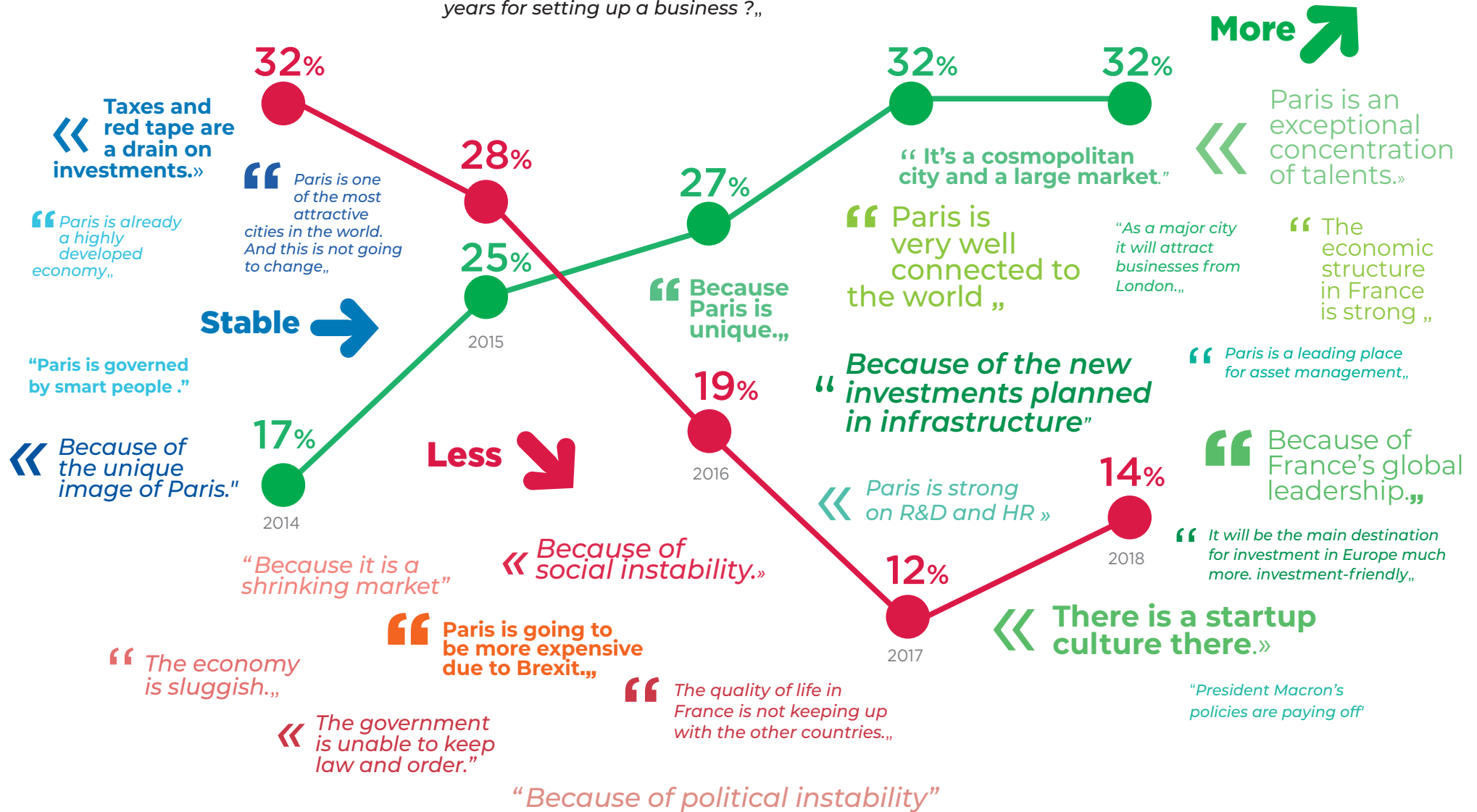
They already consider Paris 2nd for global attractiveness. They also rank Paris 2nd regarding their own company's projects over the next 3 years, backing opinion with a personal mark of confidence.

This enviable position marks a striking reversal of fortune over the last five years, one which saw investors give consistently better ratings Paris on investments criteria.

Among the reasons quoted by investors to support their analysis, political stability, legal security and the concentration of talents come on top.

And of course, Paris is also an outstanding brand associated with a remarkably stable and favorable image.

“ In your view, will Paris become more or less attractive over the next three years for setting up a business ?..”



METHODOLOGY

INTERNATIONAL INVESTMENTS

International investments are tracked by the “fDi markets” database. The “fDi markets” database collects information about “crossborder investment in a new physical project or expansions of an existing investment which creates new jobs and capital investment.

Joint ventures are only included where they lead to a new physical operation. Mergers & acquisitions (M&A) and other equity investments are not tracked. There is no minimum size for a project to be included”. The Monitor uses the simplest possible unit: a published investment project, by contrast with expected job creations or capex, so as to maximize comparability and minimize interferences from local factors – currency fluctuations, governmental promotion, etc.

The top global cities for international investments list is regularly updated to take account of the significant rebalances in the global economy.

35 GLOBAL CITIES TOP DESTINATIONS IN TERM OF INTERNATIONAL INVESTMENTS

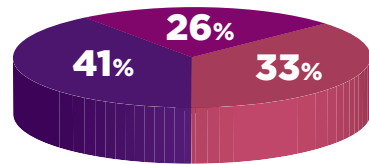


INVESTORS' PERCEPTIONS

Are measured through a poll conducted with a representative sample of 510 companies with international business settlements

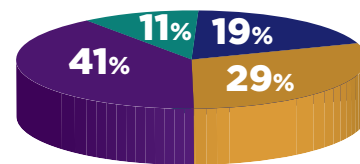
- 22 countries
 - 3 criteria:
 - Location of headquarters
 - Industry
 - Turnover
 - Phone interviews with global business leaders
- 28 January to 29 March 2019

REVENUE (in €)



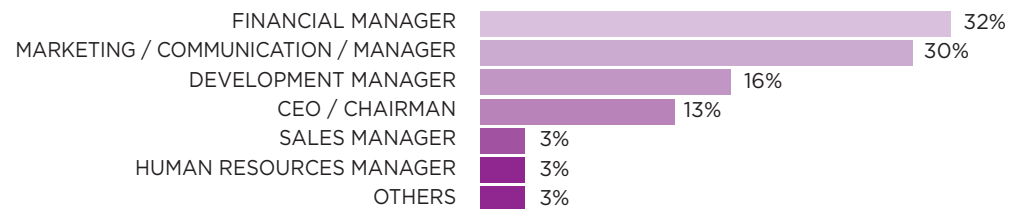
- Less than 500 million
- Between 500 millions and 5 billion
- More than 5 billion

BUSINESS ACTIVITY



- Service
- IT
- Heavy industry
- Retail

POSITION OF THE INTERVIEWEE



In addition to presenting the evolution of international investments at the global level and in the main world cities, this year's report includes a section on investments in Research and Development.

It ends with a section on the perception of the attractiveness of the main competing cities through the Opinion Way survey.

The Global Cities Investment Monitor demonstrates that Greater Paris is an attractive business player with a remarkable global image.



KPMG FRANCE

KPMG France is a leading audit and advisory firm, member of KPMG International, a global network of professional firms with a presence in 154 countries across the world. KPMG France employs 9,000 professionals and serve major international and French companies, SMEs or family groups, and start-ups, in all industry areas.

GREATER PARIS INVESTMENT AGENCY

Greater Paris Investment Agency is a non-profit organization founded 25 years ago by the Paris Chamber of Commerce and Industry to attract new international investors in Greater Paris and to bolster its attractiveness.

It is comprised of major companies; they guarantee total independence and provide support in fulfilling the Association's main missions.

As Greater Paris business ambassador, our Agency is a key partner and advisor linking government decision-makers and our prestigious business partners' network. It is a major player in the Greater Paris project.

PARIS REGION ENTREPRISES

Paris Region Entreprises is a catalyst for business and innovation which supports international companies willing to expand in the Paris Region.

As a non profit governmental agency, Paris Region Entreprises works with local public entities to provide free tailor-made services.

Paris Region Entreprises brings its deep market and industry expertise together with an extensive network to support international companies in building tech partnerships, designing their go to market strategy, and providing guidance to implement their local presence.

Every year, with a team of 80 dedicated professionals across Europe, the US and China, Paris Region Entreprises supports 1,000+ international companies looking to grow their business in the Paris Region, one of the leading tech and business hubs in the world.





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