

The International Image of Greater Paris

A survey carried out with the chief executives of world-wide companies established
in Europe

April 2005



Paris-Ile de France Capitale Economique

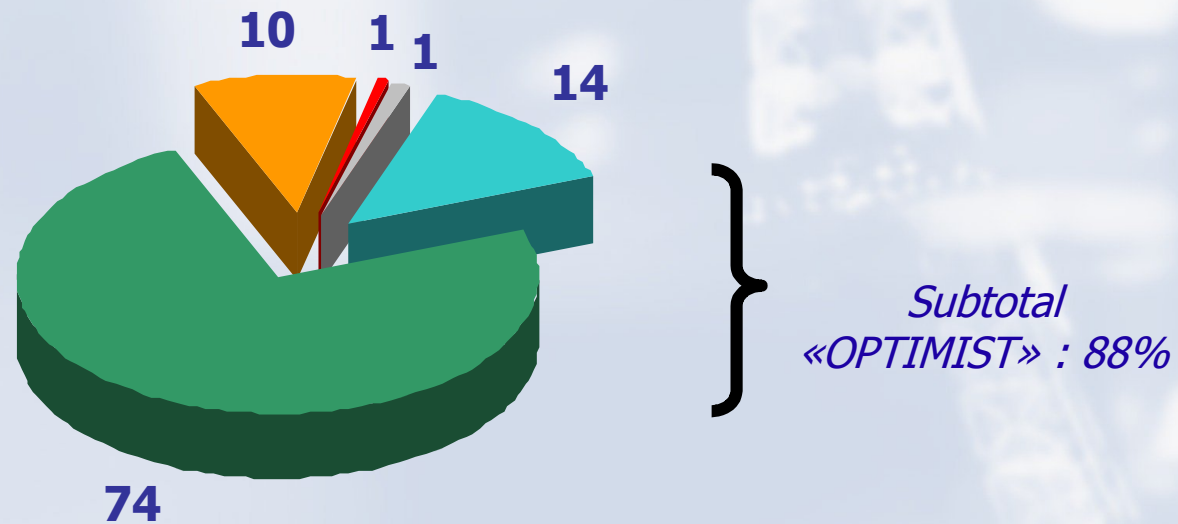
- Survey carried out with 504 Chief Executives of the 15.000 main world-wide companies established in Europe (Chairmen and CEO, Managing Directors, executive members of the board, executives in charge of company settlement...)

- The respondents have been interviewed by phone on their workplace, from March, 8th to April, 4th, 2005.

- The polls took place in the following countries :
 - » *France*
 - » *United Kingdom*
 - » *Germany*
 - » *Italy*
 - » *Spain*
 - » *Sweden*
 - » *The Netherlands*
 - » *Belgium*
 - » *Luxembourg*

State of mind of the economic decision-makers

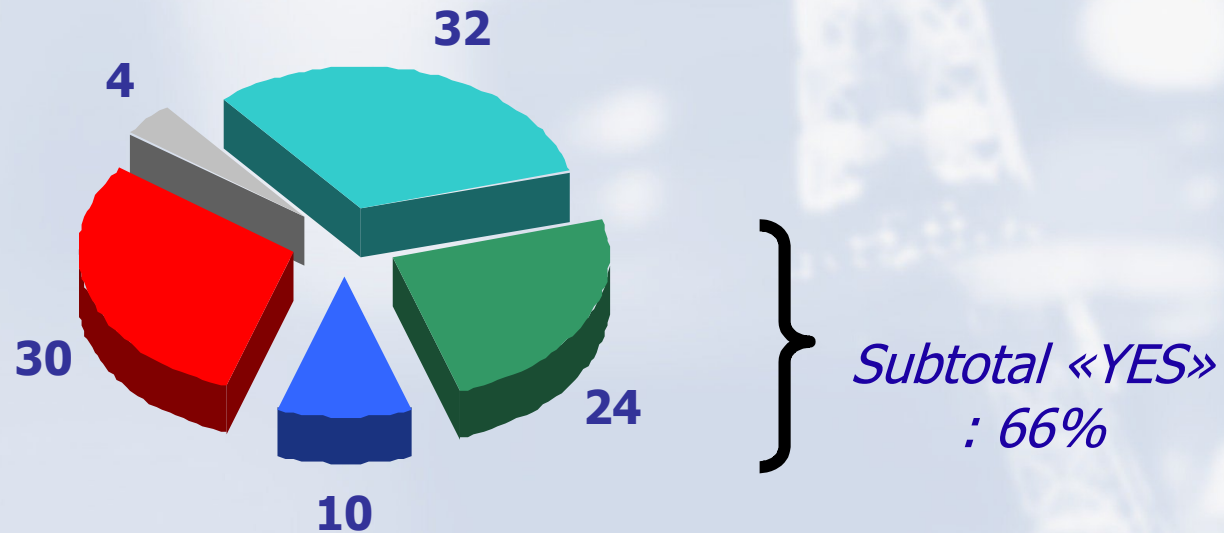
■ Very optimist
 ■ Rather optimist
 ■ Rather pessimist
 ■ Very pessimist
 ■ Do not know



- ✓ *The most optimists : Spain (94%), Germany and Belgium (93%)*
- ✓ *The less optimists : Luxembourg (80%), Italy (78%)*
- ✓ *In France : 82%*

The intentions of settlement and/or of territorial redeployment

■ Yes, in the year to come
 ■ Yes, within 2-3 years
 ■ Yes, within 5 years
 ■ No
 ■ Do not know

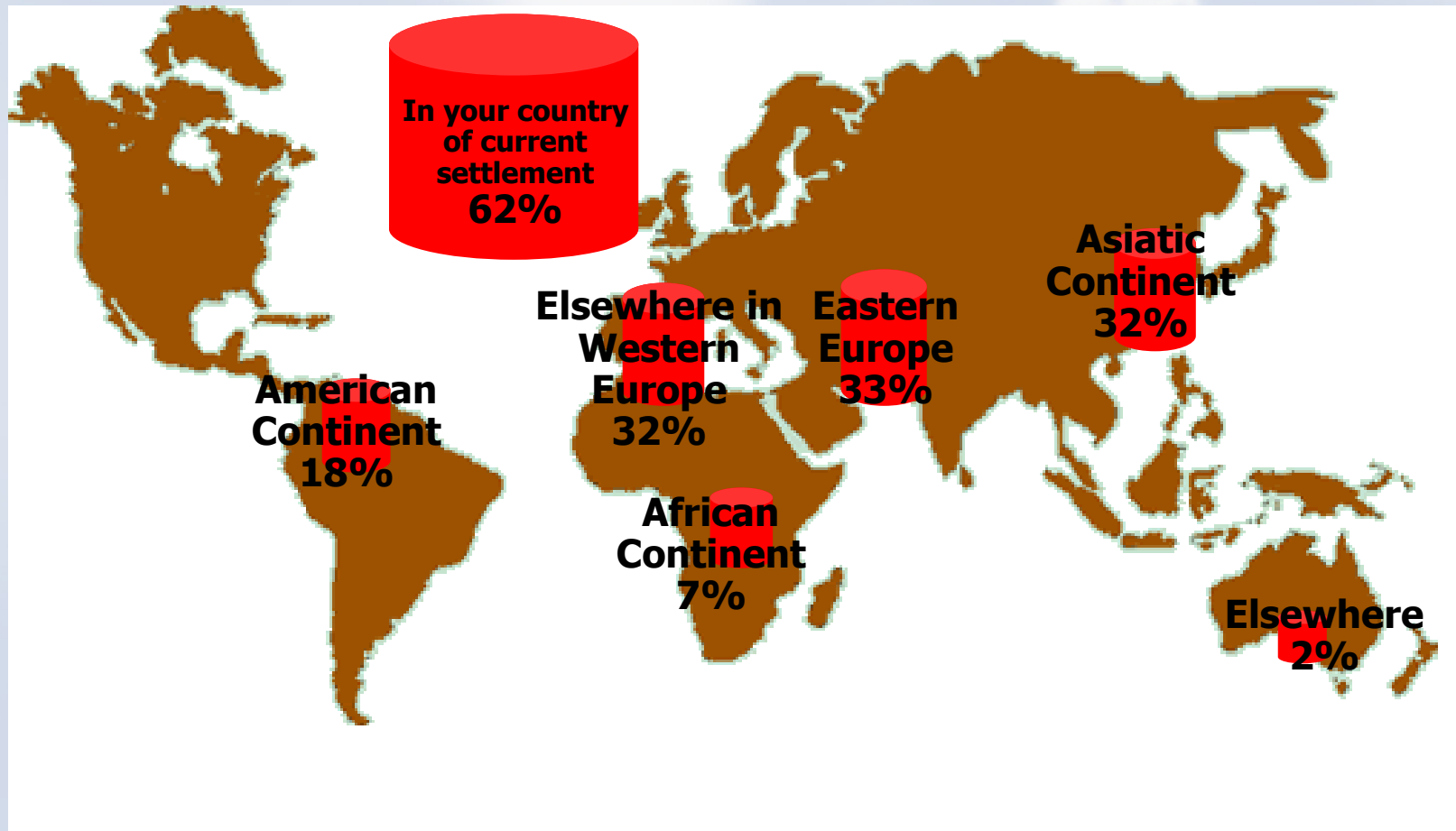


✓ *Those who have the most projects : France (73%), Germany (70%), United Kingdom (70%)*

✓ *Those who have the fewest projects : Belgium(59%), Sweden (53%)*

Wishes of location for future settlements or redeployments

Possibility of several answers

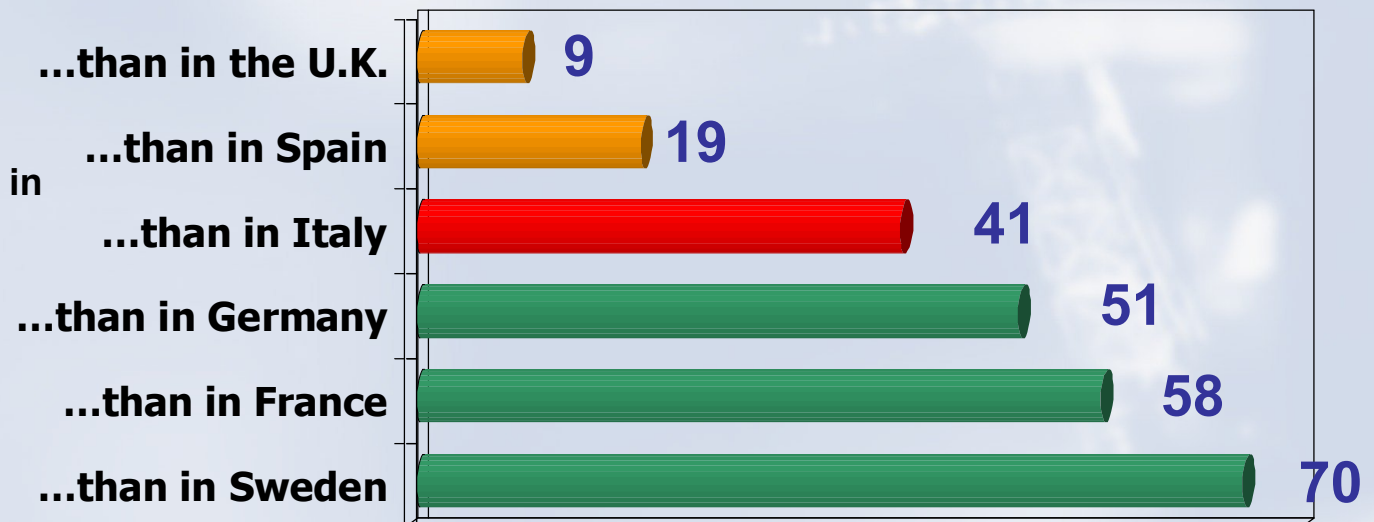


Wishes of location for future settlements or redeployments

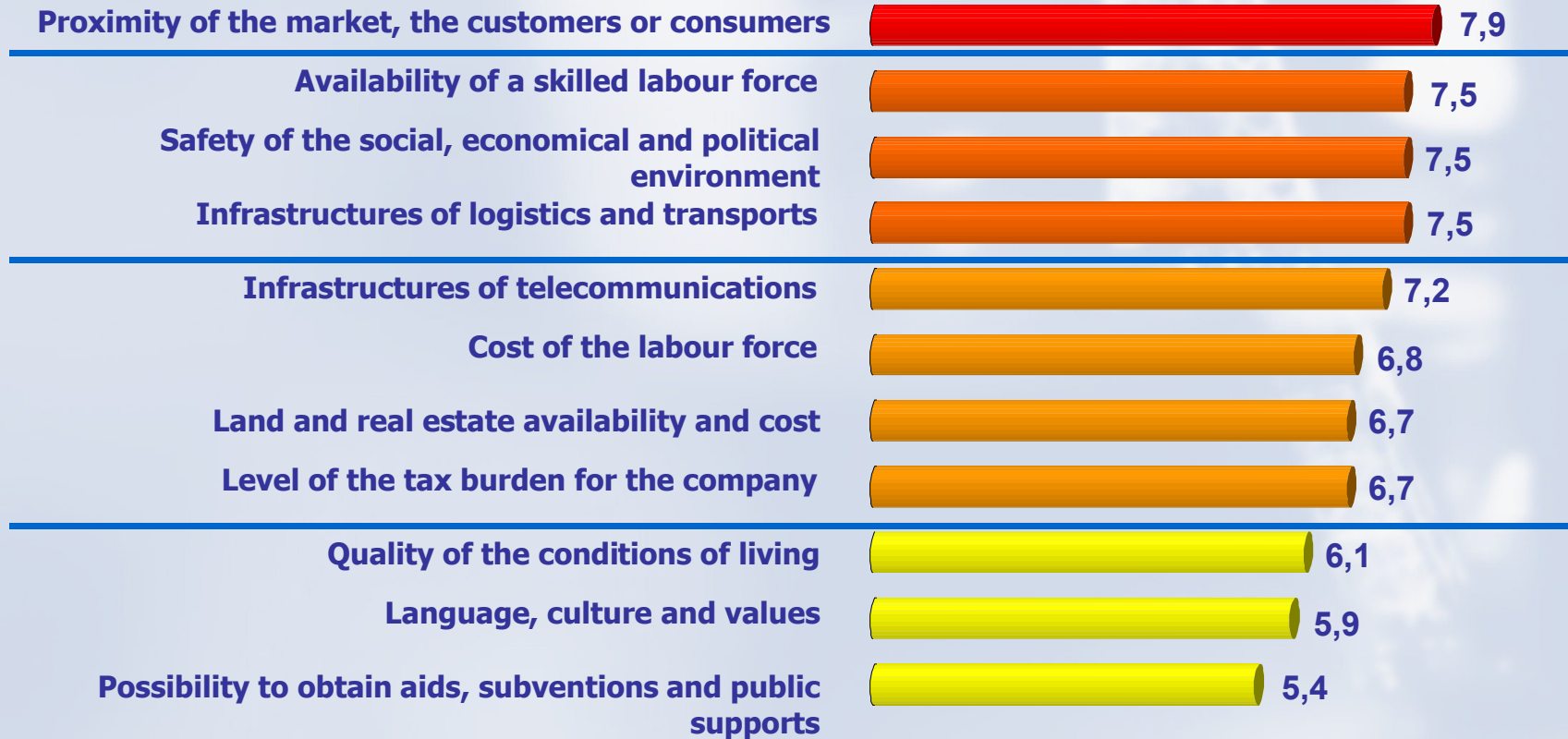
Focus:

Intentions of settlement exclusively in another country than the one of interrogation.

Companies already established in these territories and which consider to settle solely in another country...

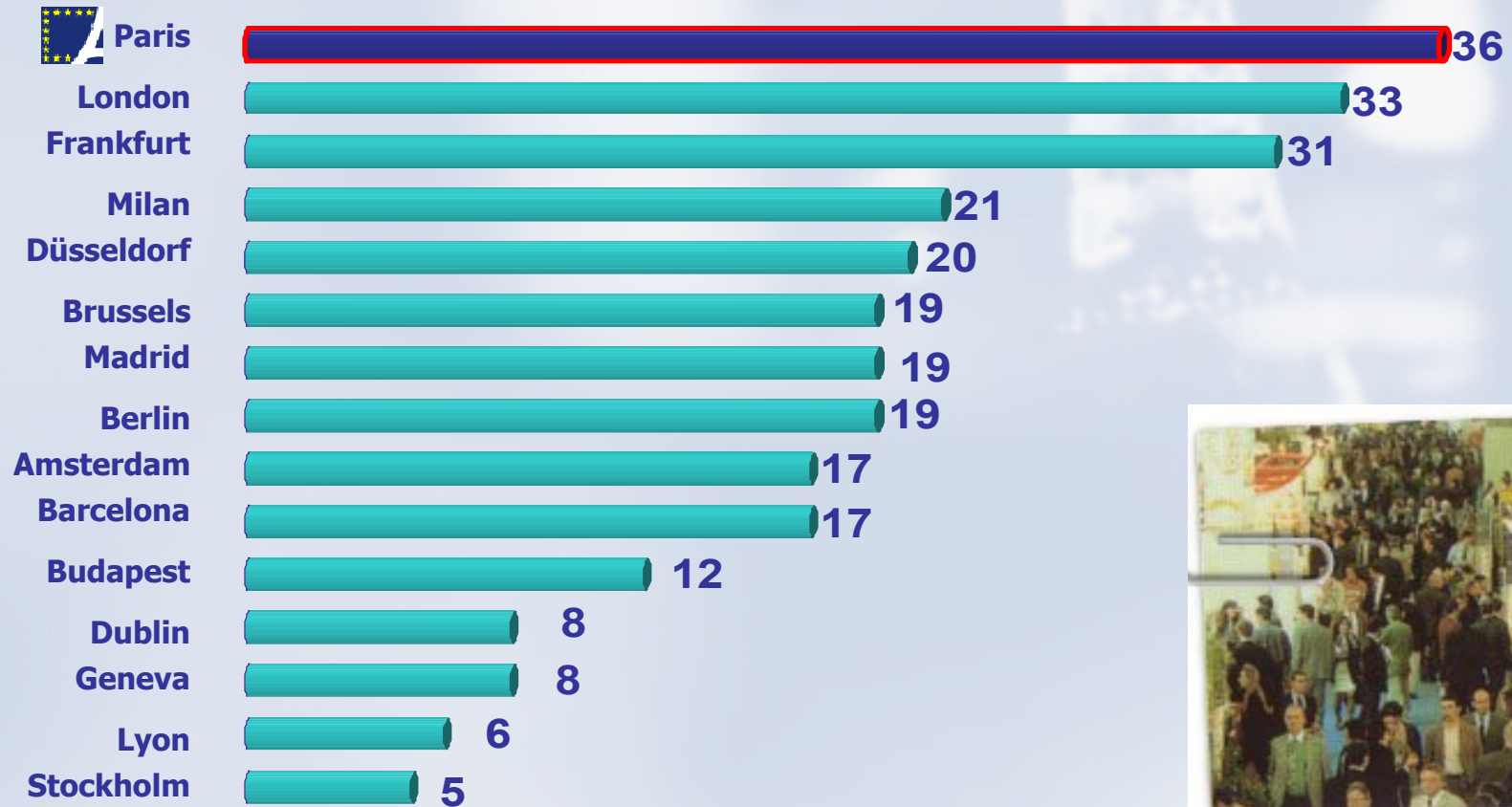


The importance of the criteria of choices for a settlement



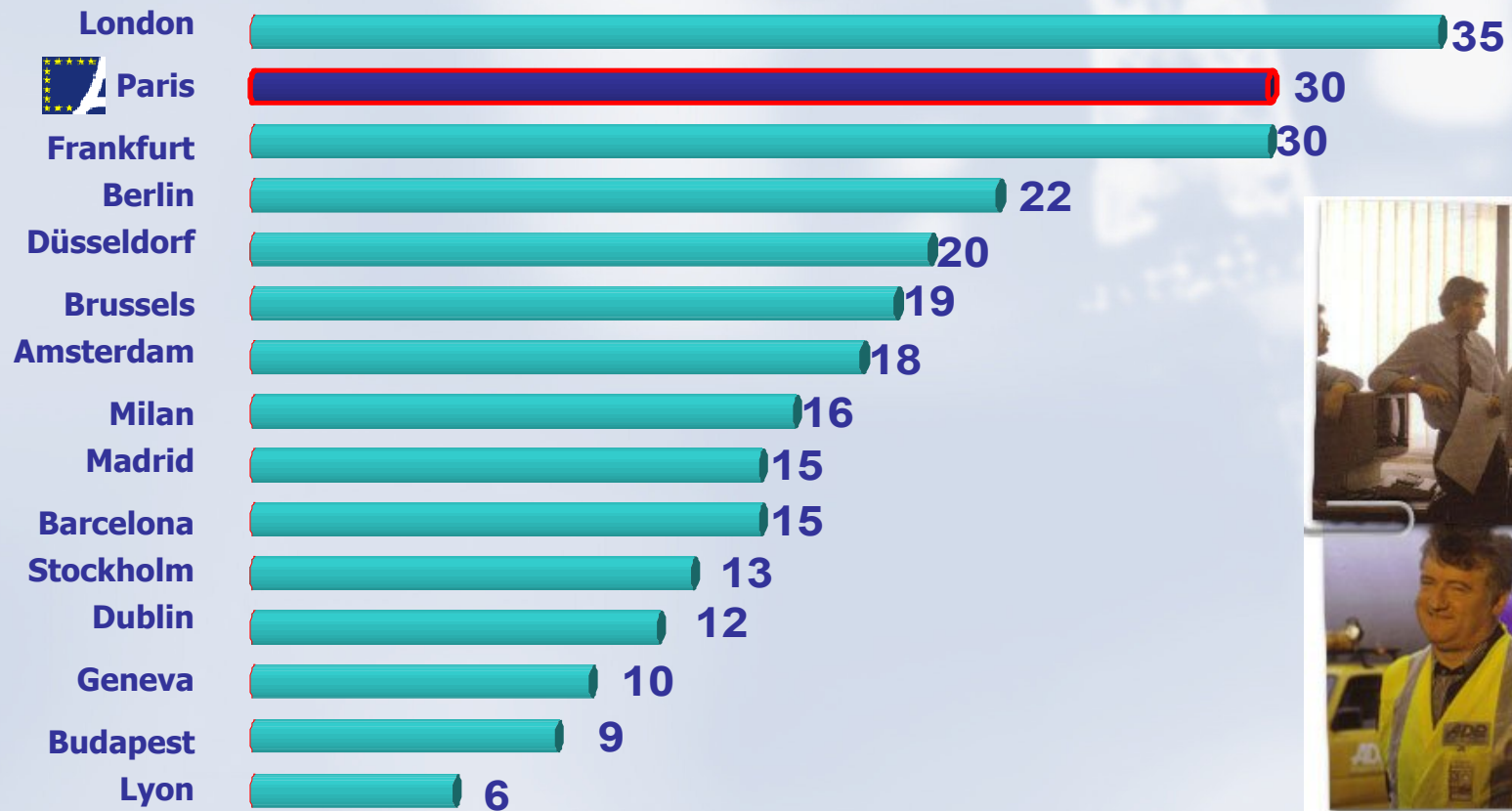
European cities evaluation by criteria

Proximity of the market, the customers or consumers



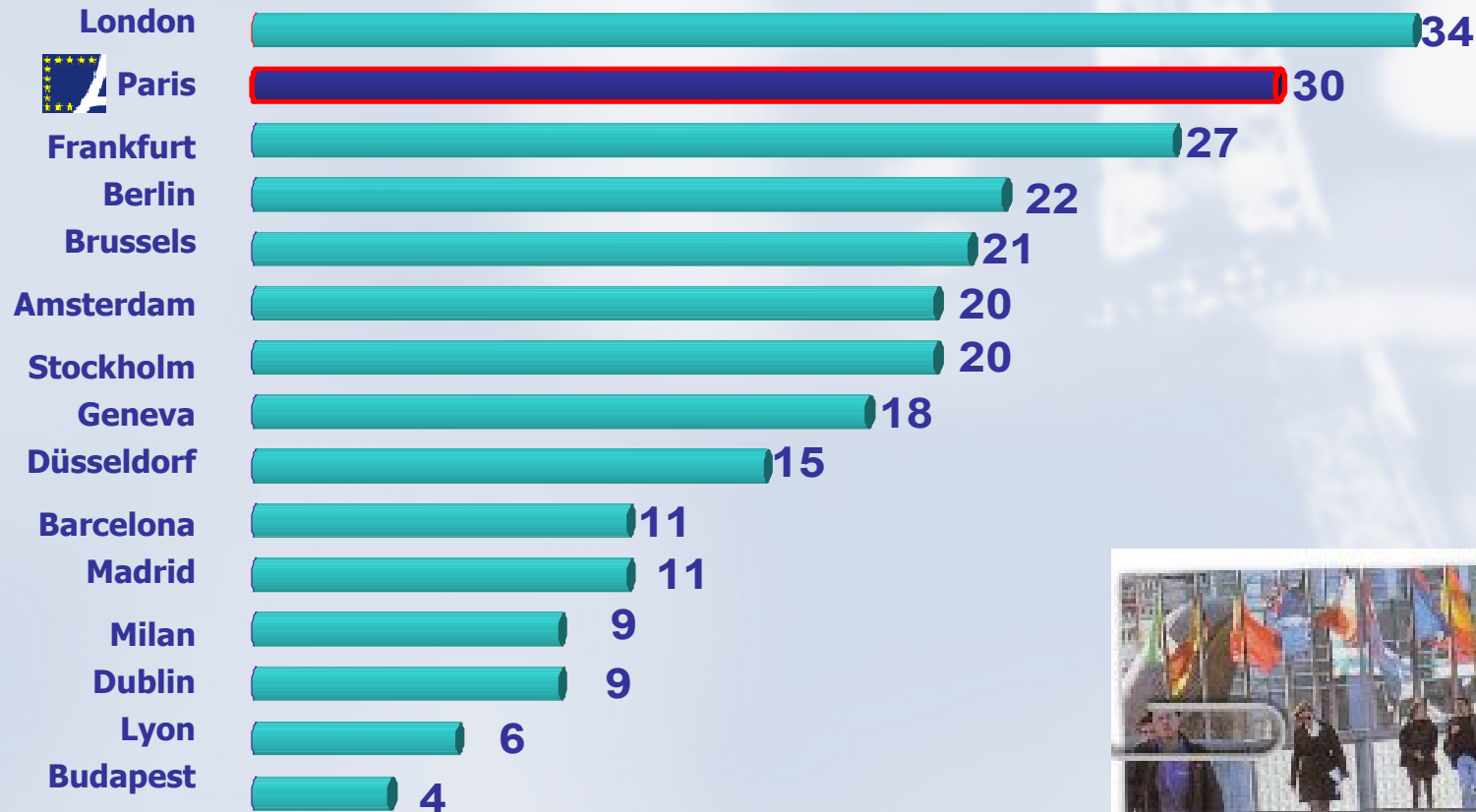
European Cities evaluation by criteria (following)

Availability of a skilled labour force



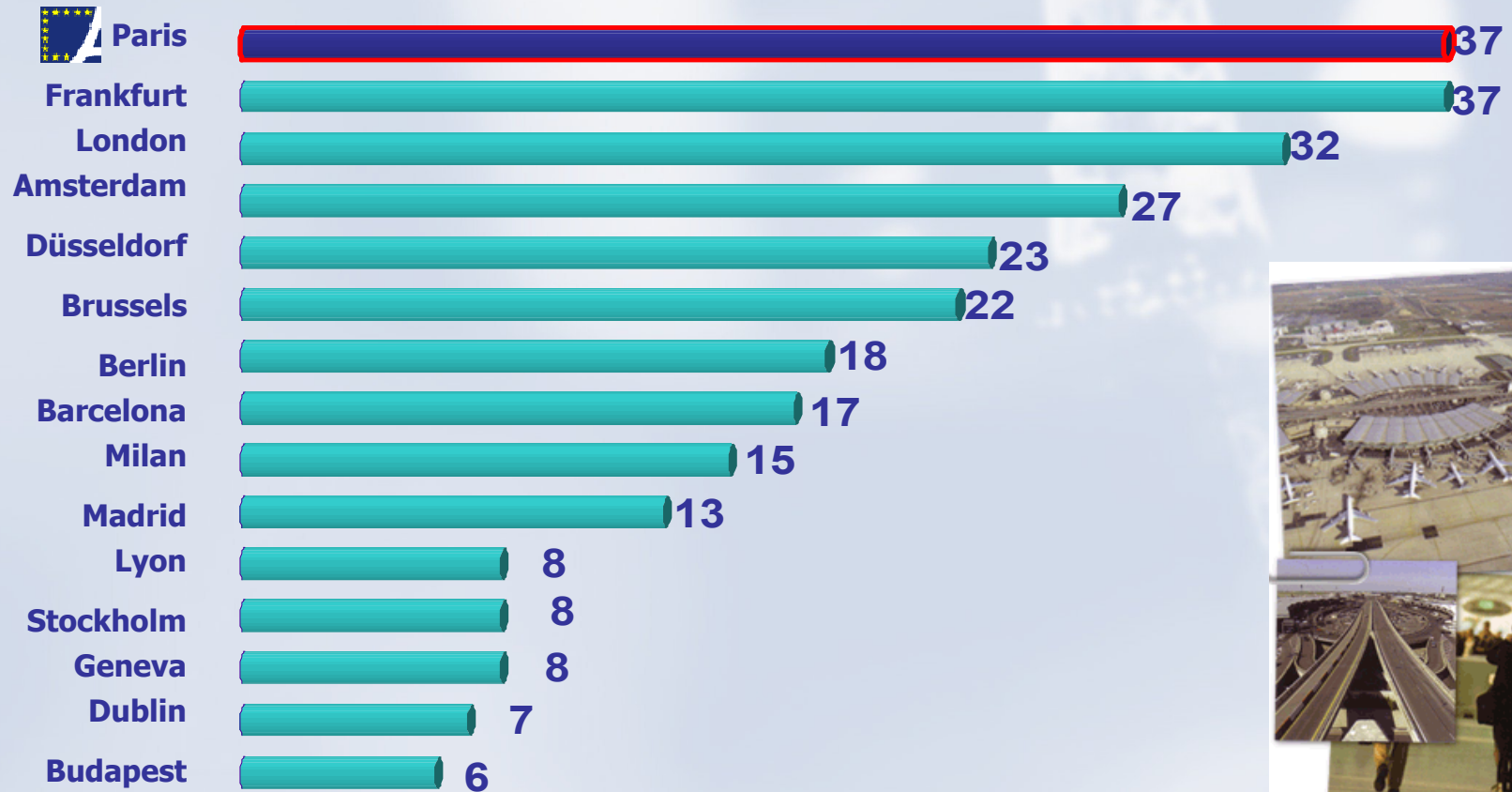
European cities evaluation by criteria (following)

Safety of the social, economical and political environment



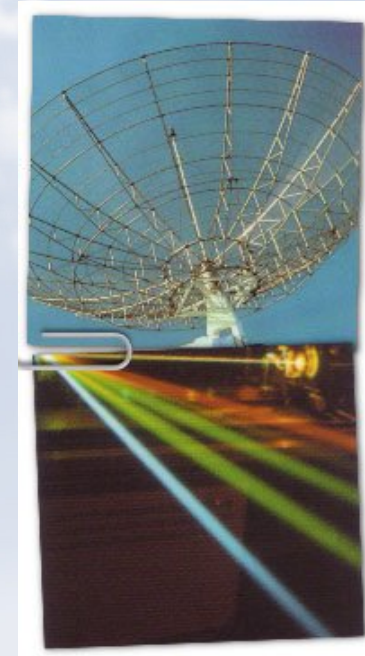
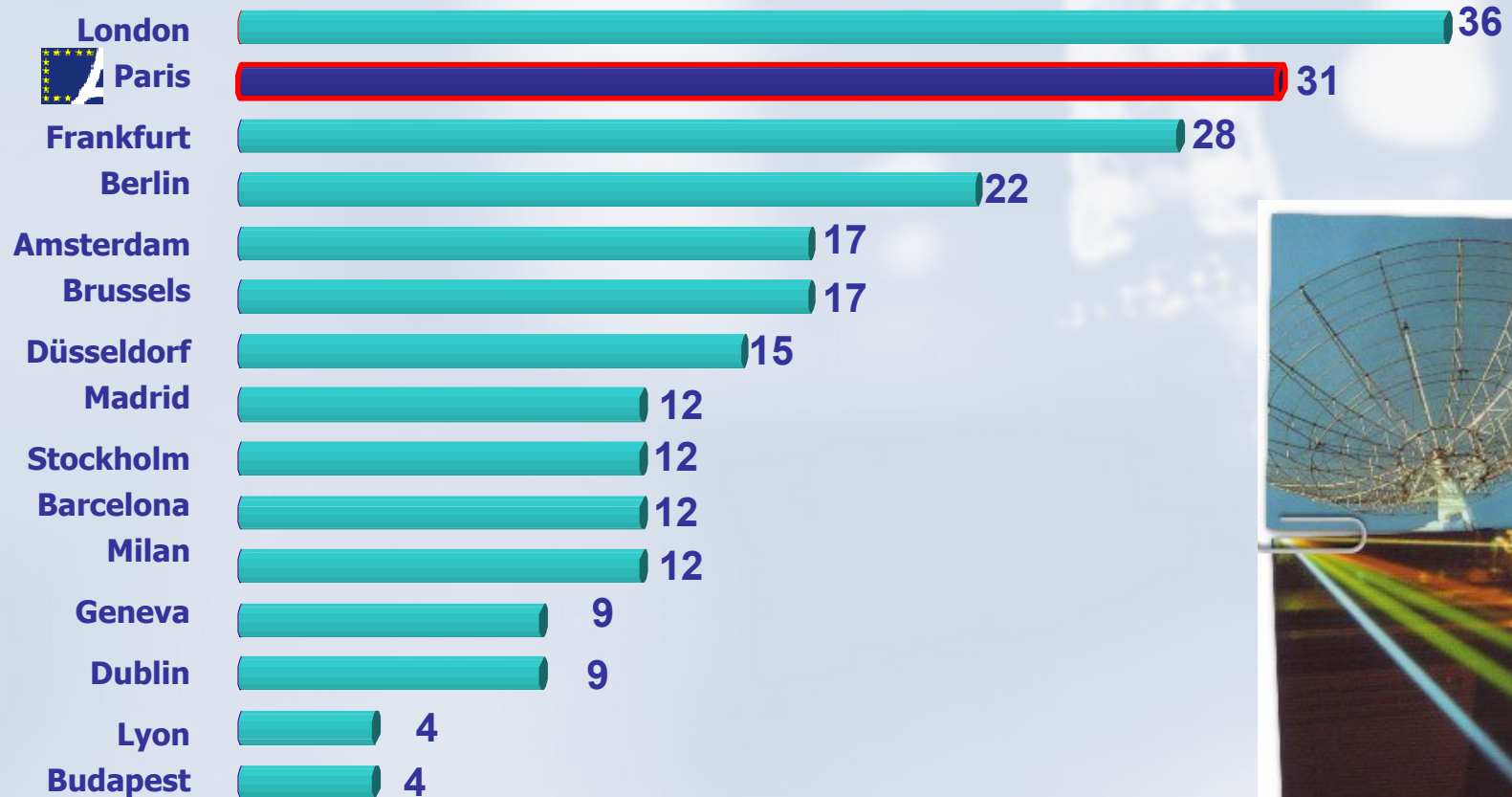
European cities evaluation by criteria (following)

Infrastructures of logistics and transports



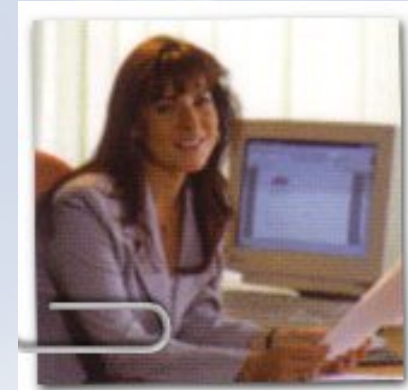
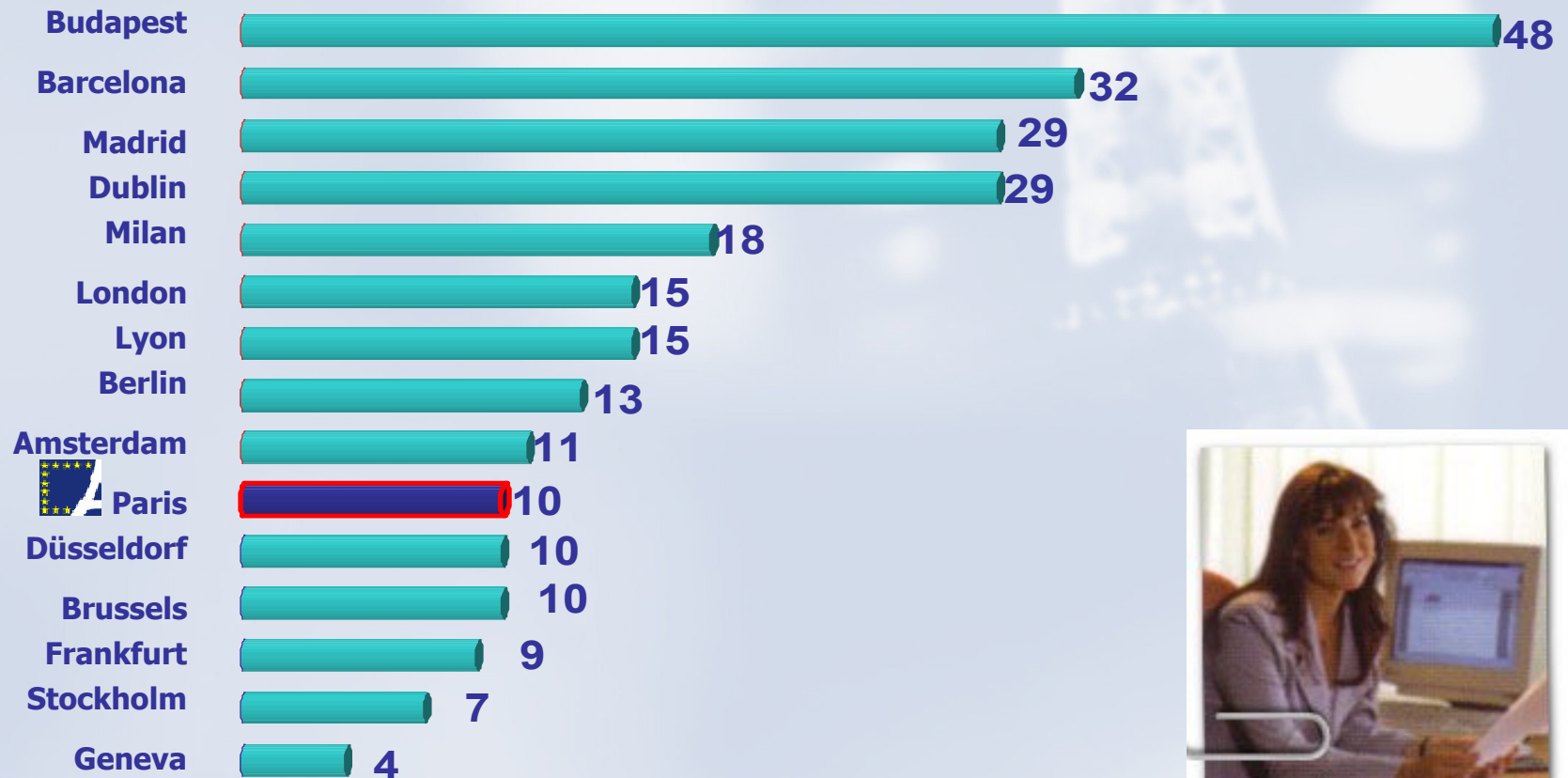
European cities evaluation by criteria (following)

Infrastructures of telecommunications



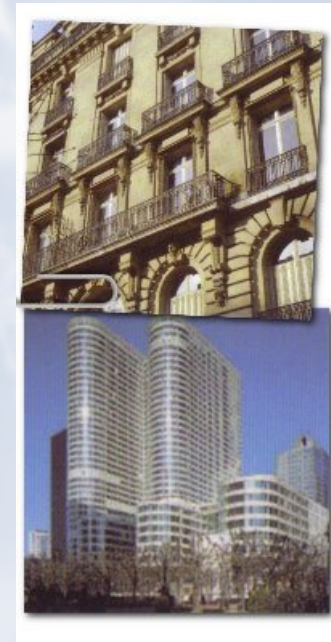
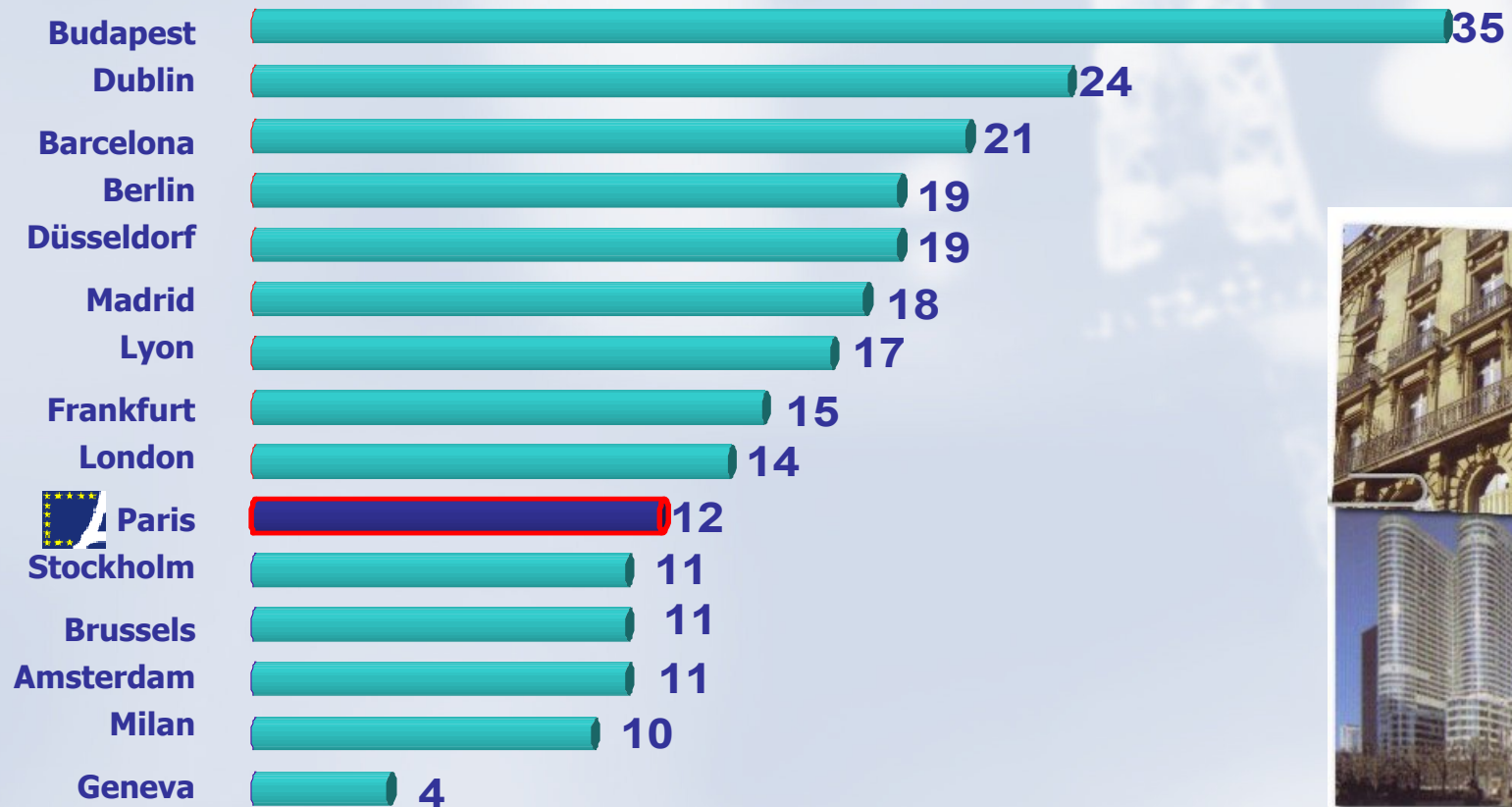
European cities evaluation by criteria (following)

Cost of the labour force



European cities evaluation by criteria (following)

Land and real estate availability and cost



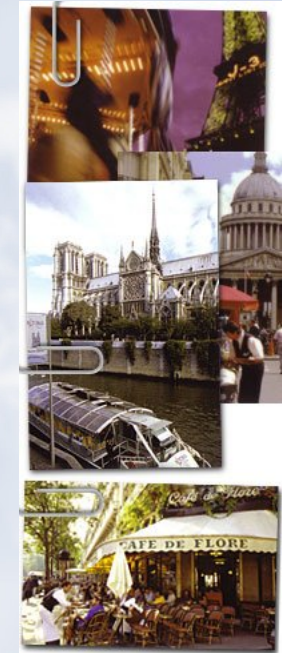
European cities evaluation by criteria (following)

Level of the tax burden for the company



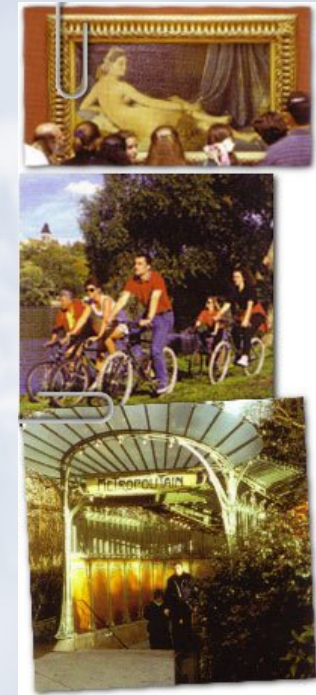
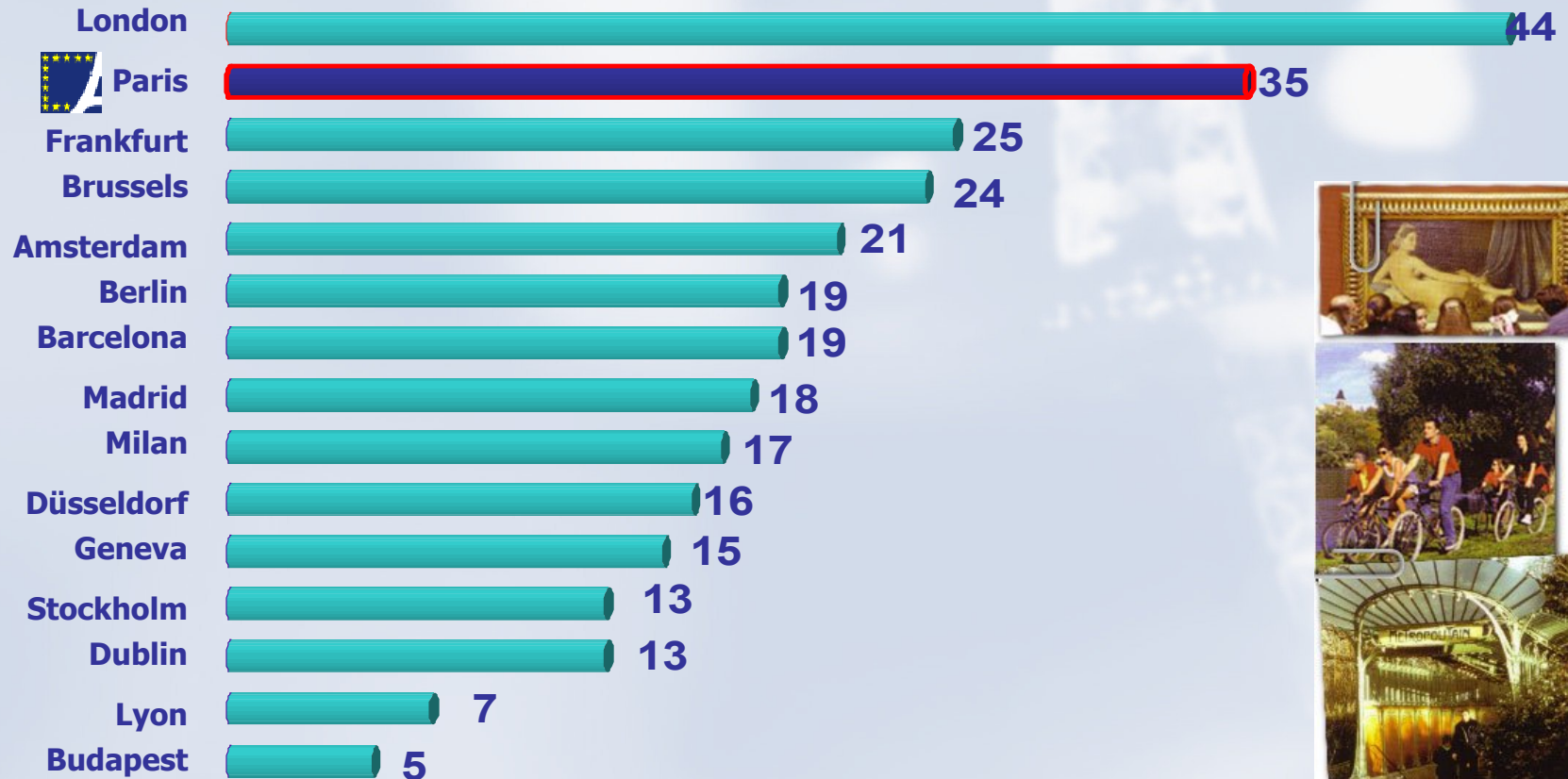
European cities evaluation by criteria (following)

Quality of the conditions of living



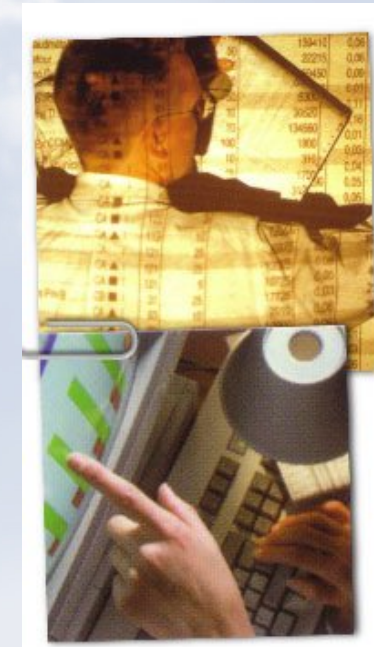
European cities evaluation by criteria (following)

Language, culture and values

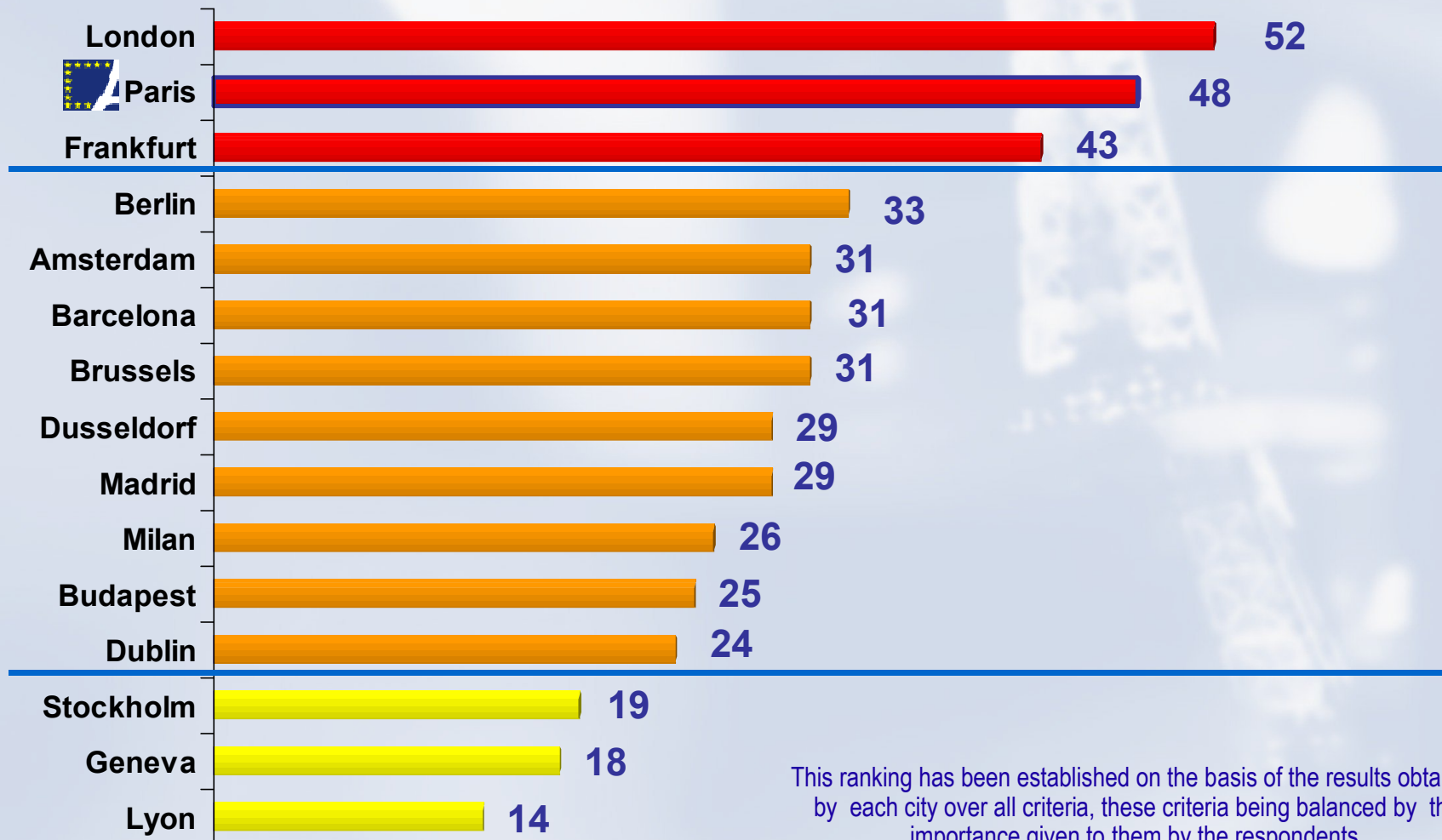


European cities evaluation by criteria (following)

Possibility to obtain aids, subventions and public supports

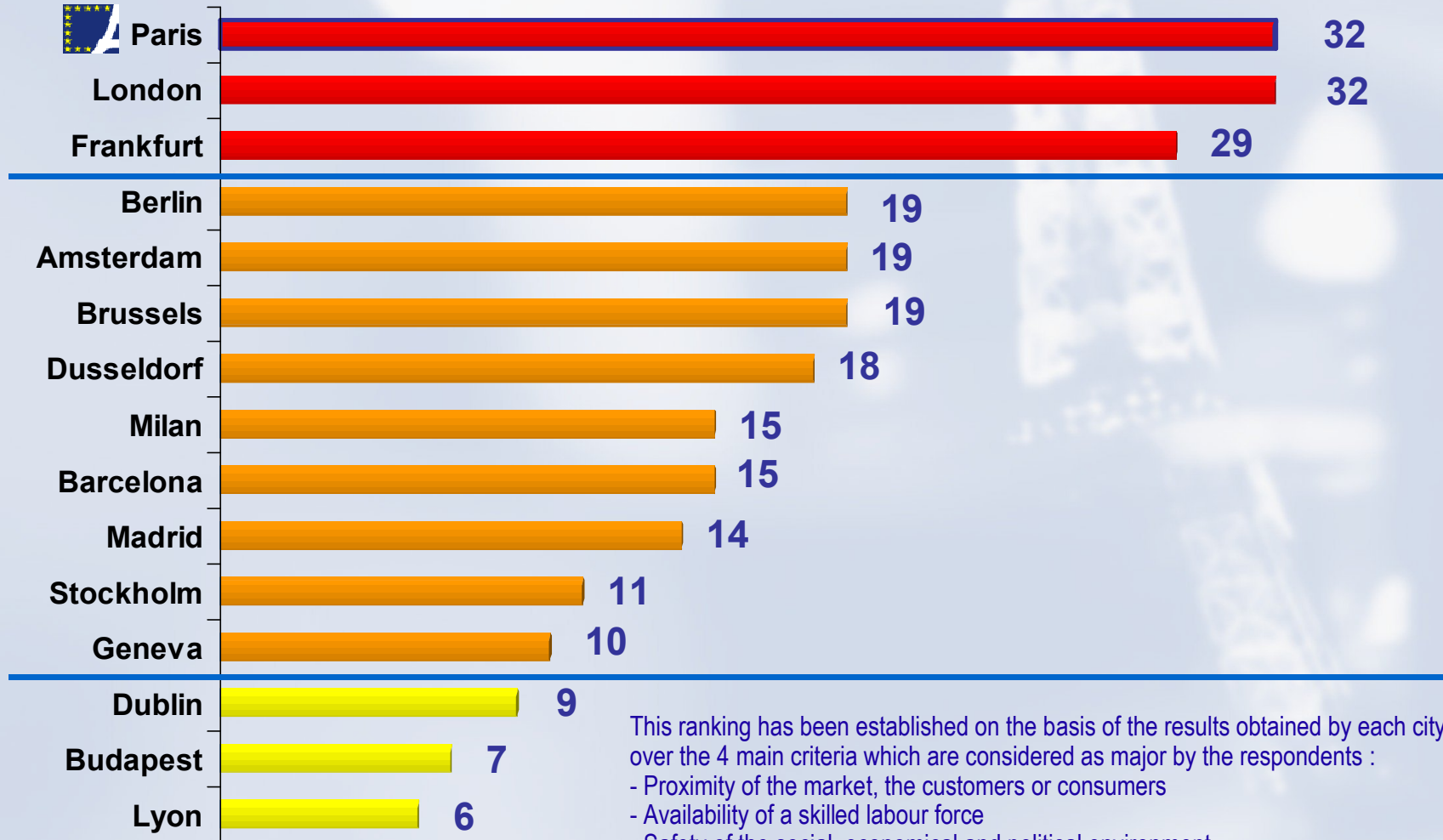


Global ranking of the cities over all criteria



This ranking has been established on the basis of the results obtained by each city over all criteria, these criteria being balanced by the importance given to them by the respondents.

Global ranking of the cities over the 4 main criteria



This ranking has been established on the basis of the results obtained by each city over the 4 main criteria which are considered as major by the respondents :

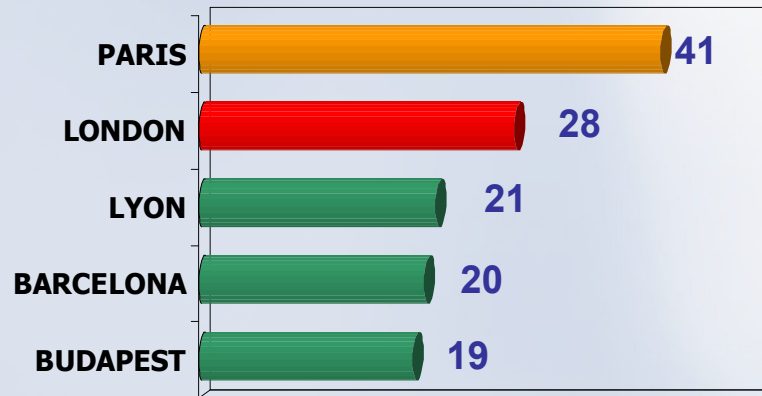
- Proximity of the market, the customers or consumers
- Availability of a skilled labour force
- Safety of the social, economical and political environment
- Infrastructures of logistics and transports



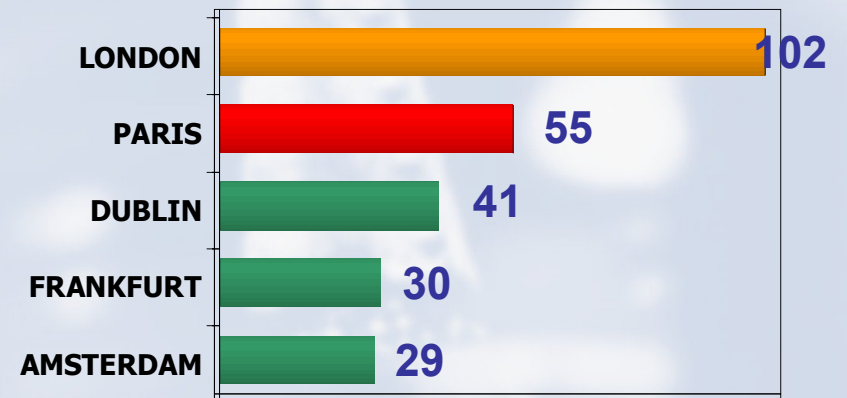
Global attractiveness of European cities : assessment per country



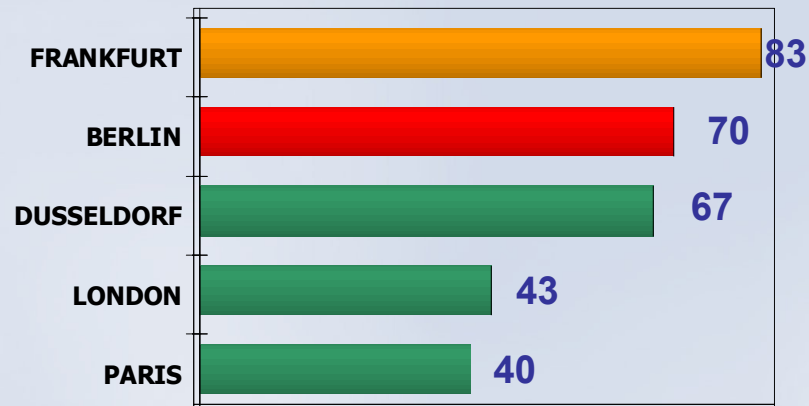
TOP 5 for the companies polled only in France



TOP 5 for the companies polled only in Great Britain



TOP 5 for the companies polled only in Germany

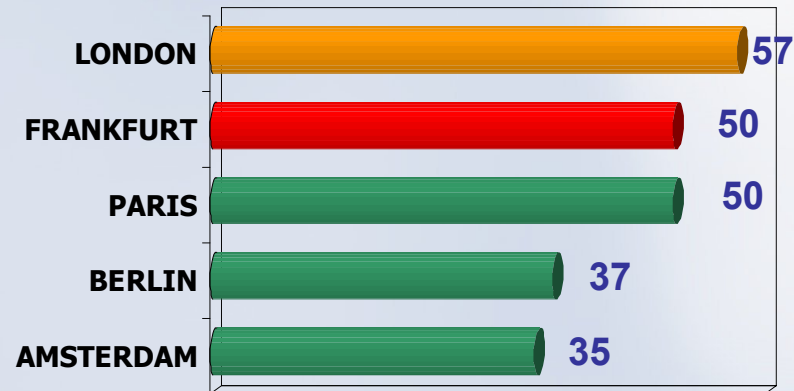




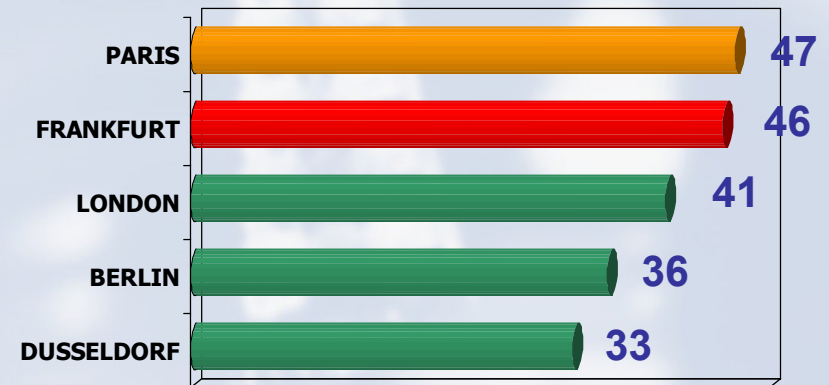
Global attractiveness of European cities : assessment per country



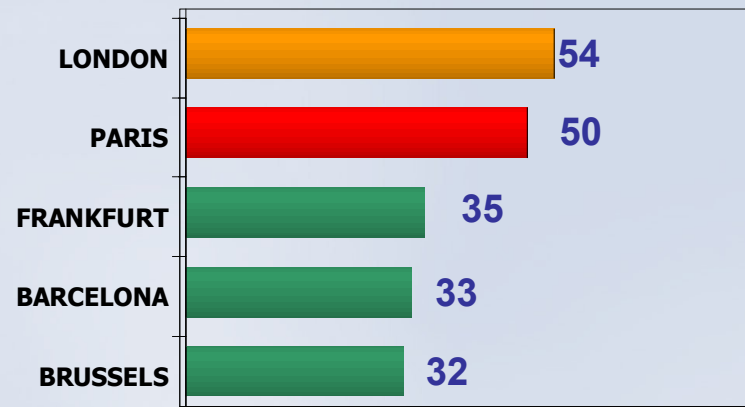
TOP 5 for the companies polled but in France



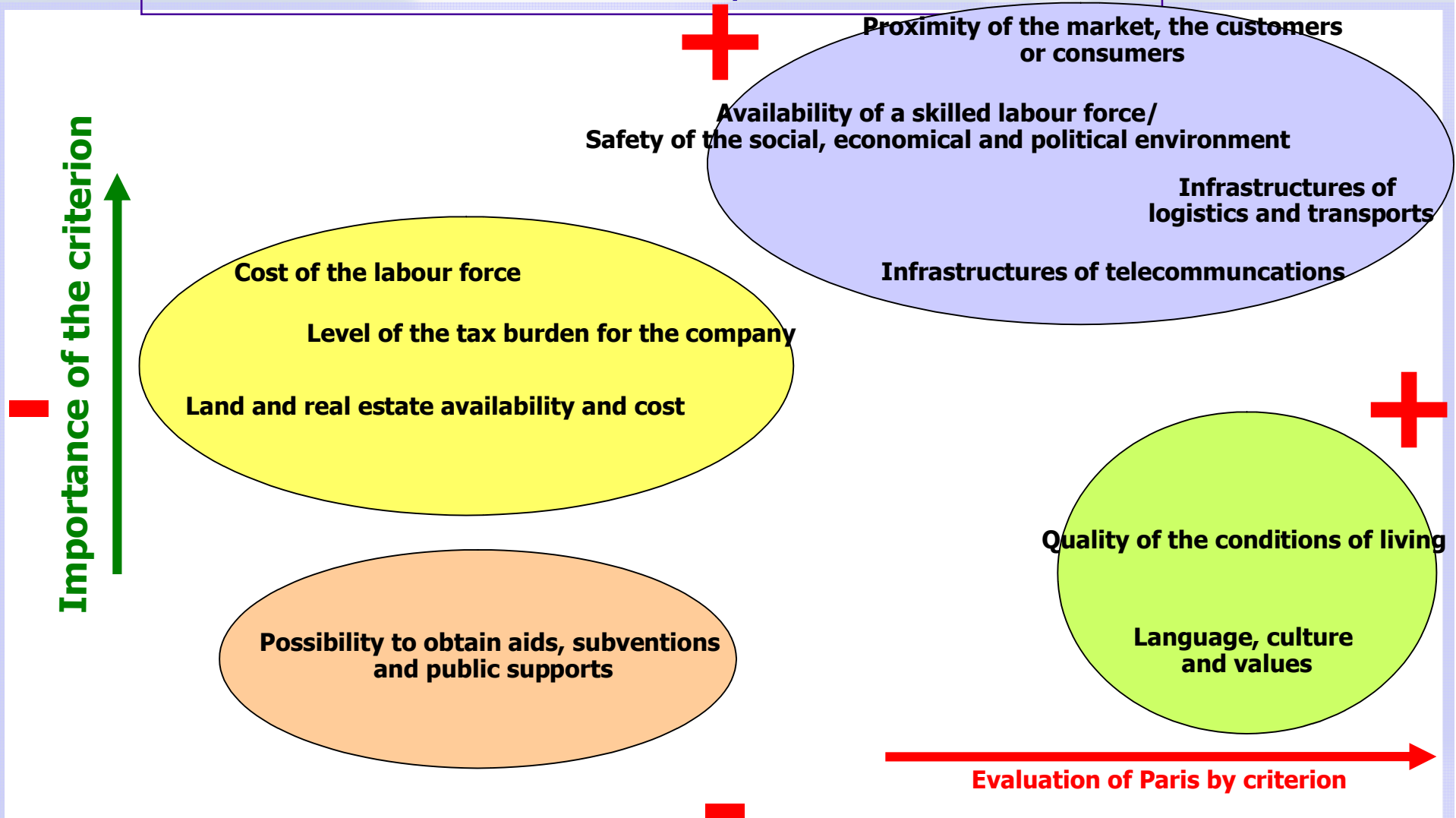
TOP 5 for the companies polled but in Great Britain



TOP 5 for companies polled but in Germany



Summary : positioning of Paris (evaluation of the criterion x importance of the criterion)



Rank of cities for all criteria

	London	Paris	Frankfurt	Berlin	Amsterdam	Barcelona	Brussels	Düsseldorf	Madrid	Milan	Budapest	Dublin	Stockholm	Geneva	Lyon
Proximity of the market, the customers or consumers	2	1	3	8	9	10	6	5	7	4	11	12	15	13	14
Availability of a skilled labour force	1	2	3	4	7	10	6	5	9	8	14	12	11	13	15
Safety of the social, economical and political environment	1	2	3	4	6	10	5	9	11	12	15	13	7	8	14
Infrastructures of logistics and transports	3	1	2	7	4	8	6	5	10	9	15	14	12	13	11
Infrastructures of telecommunications	1	2	3	4	5	10	6	7	8	11	15	13	9	12	14
Cost of the labour force	6	10	13	8	9	2	12	11	3	5	1	4	14	15	7
Land and real estate availability and cost	4	8	10	11	7	3	9	13	5	12	2	1	14	6	15
Level of the tax burden for the company	9	10	8	4	13	3	12	5	6	14	1	2	11	15	7
Quality of the conditions of living	2	1	10	9	6	3	7	12	4	5	15	14	11	8	13
Language, culture and values	1	2	3	6	5	7	4	10	8	9	15	13	12	11	14
Possibility to obtain aids, subventions and public supports	7	6	10	5	9	3	8	11	4	12	1	2	14	15	13

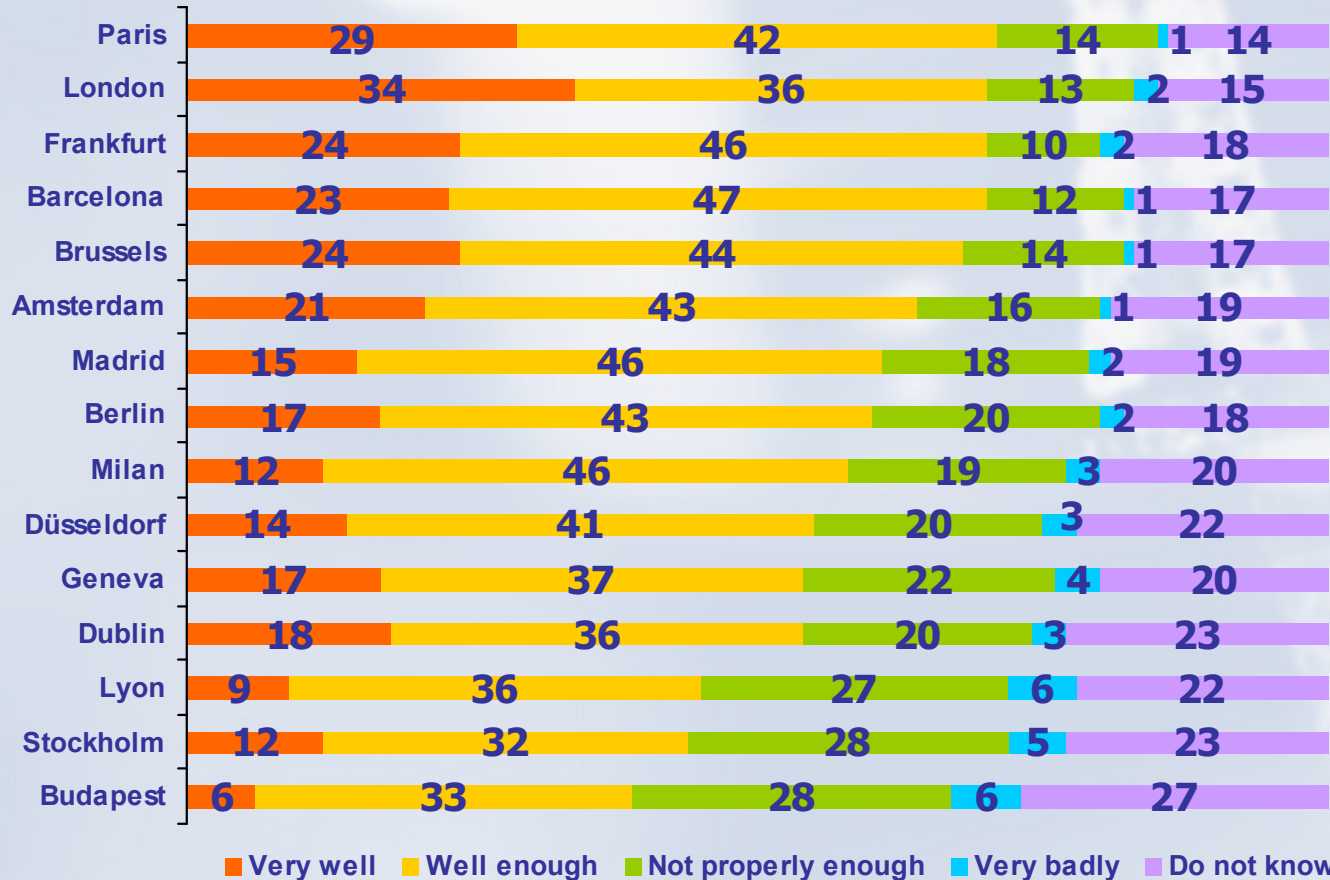


Cities' promotion



Paris - Ile de France Capitale Economique

**S/T
WELL**



71%
70%
70%
70%
68%
64%
61%
60%
58%
55%
54%
54%
45%
44%
39%



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