

# WHY INVEST IN FRANCE



# 1 WHY INVEST IN FRANCE ?

## AN ATTRACTIVE COUNTRY

- New record in FDI decisions in 2018
- France is moving up in international rankings
- Paris, a vibrant global metropolis

## A LAND OF OPPORTUNITY

- A strategic location
- An economy open to the world
- A skilled and competitive workforce
- A welcoming ground for entrepreneurs

## A VIBRANT TECH AND INNOVATION SCENE

- A talent hub
- The best R&D incentive in Europe
- France's ambition to become a 'start-up nation'
- The French VC market: a gateway to tech investments in Europe

## A WORLD-CLASS INFRASTRUCTURE

- Transport networks
- Energy
- Connectivity

## THE PLACE TO BE IN

- The industry of the future
- Artificial Intelligence
- Aeronautic and space industries
- Renewable energies & environment
- Smart city and smart mobility
- The car of tomorrow
- Software and digital industry
- Health industries
- The agri-food industry
- Paris, a prime financial marketplace



# AN ATTRACTIVE COUNTRY

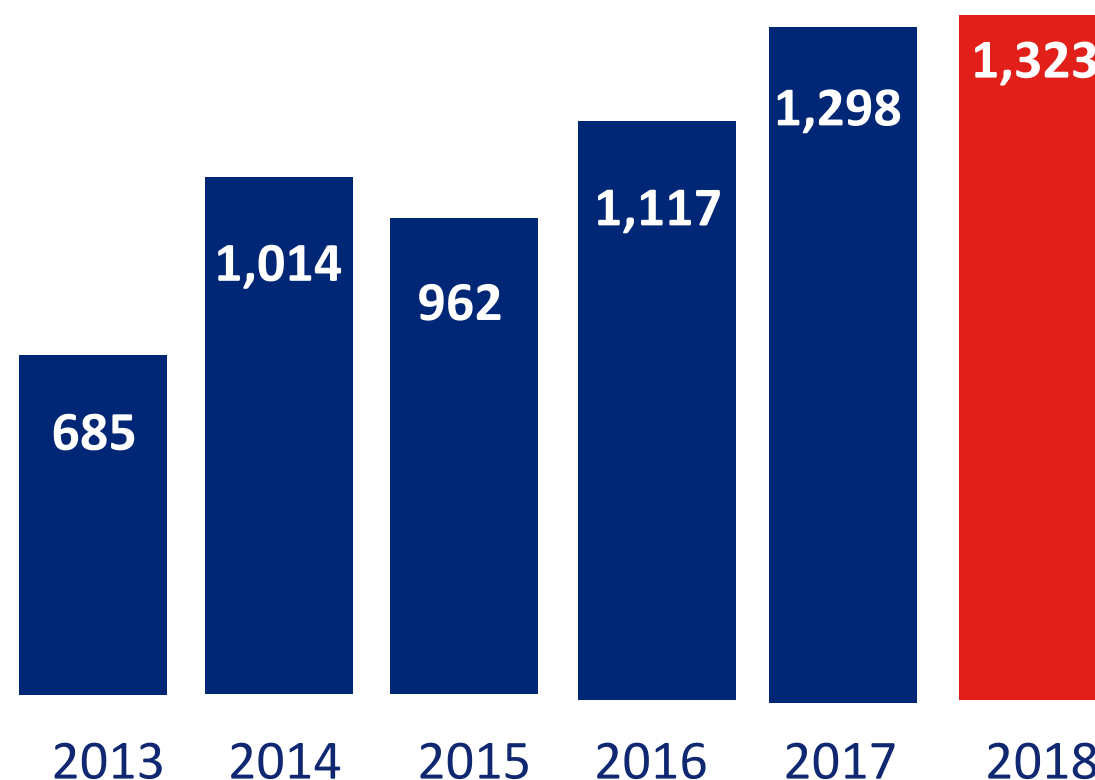
New record in FDI decisions in 2018

Choose  
France™



**1,323** new investment  
decisions in France in 2018

(new record in 10 years)



25 new investment decisions every week  
(19 in 2015 and 21 in 2017)

*Foreign investments in France, 2019*



AN ATTRACTIVE COUNTRY

New record in  
FDI decisions

France is moving  
up in the  
international  
rankings

Paris, a global  
metropolis

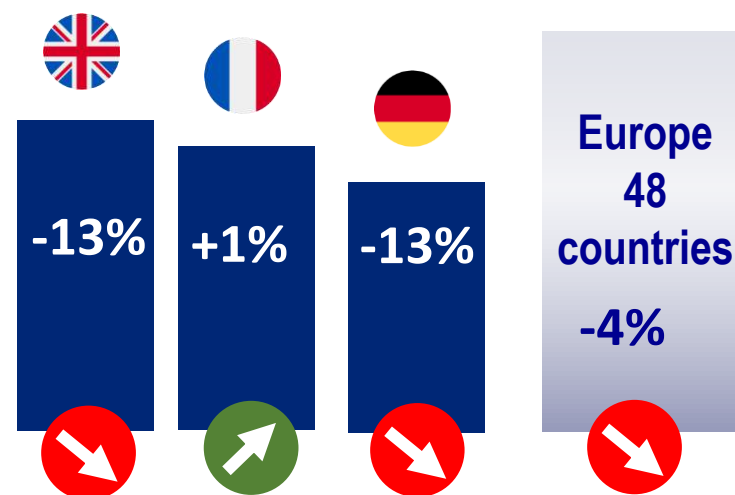
# AN ATTRACTIVE COUNTRY

New record in FDI decisions in 2018



**2<sup>nd</sup>** host country  
in Europe

in number of FDI, ahead of Germany  
and right behind the UK in 2018



% between 2017 and 2018

*France's Attractiveness Survey EY,  
2019*



France attracted  
**20%** of all job-creating  
foreign investment

in Europe (16% in the UK, 14% in  
Germany)

*Foreign investment in France Annual Report, 2019*



**78%** of international  
companies

set up in France have a positive view  
on their investment in France

*Bilan des investissements internationaux en France, 2019*

# AN ATTRACTIVE COUNTRY

New record in FDI decisions in 2018

Choose  
France™



France attracted  
**420** new foreign  
companies

(30% of overall  
investment projects)



**38%** of new investment  
decisions

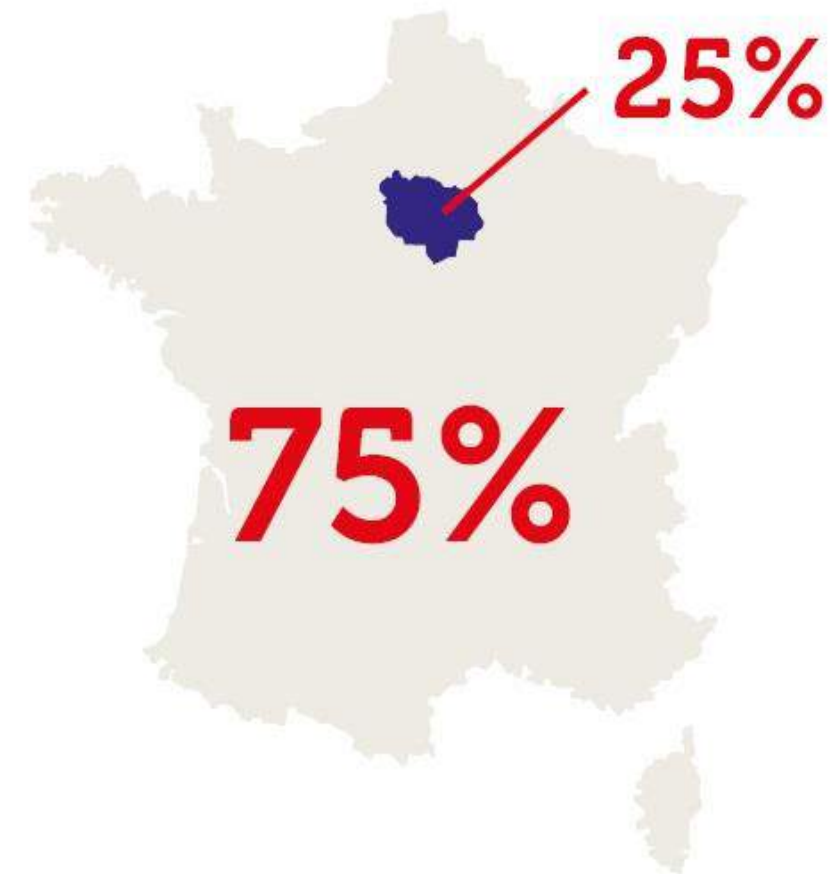
Are site expansions (+22%)



**56%** of decisions  
were investments  
at new sites

17% in site creations

*Foreign investment in France Annual Report, 2019*



**75%** of new investment  
projects

are based outside the Paris region:  
the thriving economies of France's  
regions are a positive factor of new  
investment decisions.

**97% of new industrial** projects are  
located outside de Paris region

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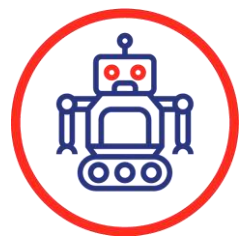


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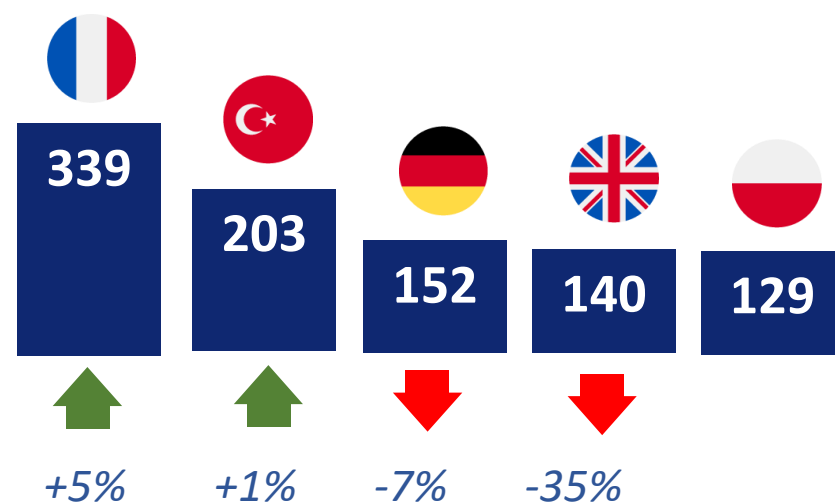
Choose  
France™

The leading host country in Europe  
for foreign investment in industry and R&D



**1st** host country  
in Europe

France has been the leading host  
country for foreign investment in  
industry for more than 15 years

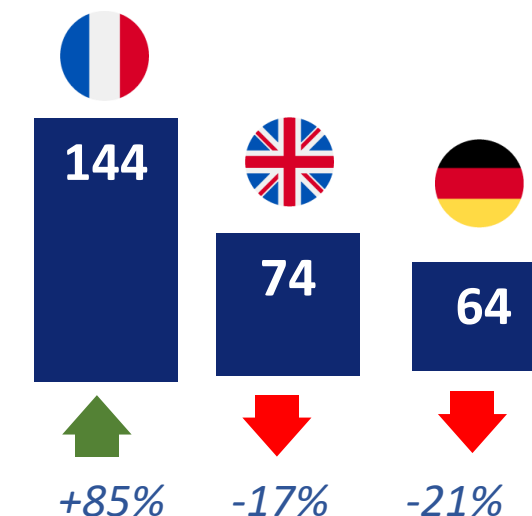


Number of projects in 2018  
EY, 2019



**1st** host country  
in Europe

in R&D center investments  
outperforming the UK and  
Germany combined



Number of projects in 2018  
EY, 2019

AN ATTRACTIVE COUNTRY

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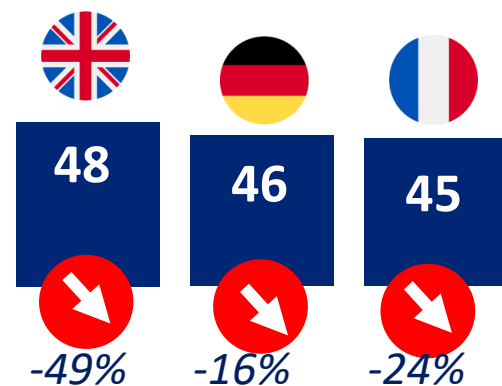
New record in FDI decisions in 2018

Choose  
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**3<sup>rd</sup>** pays d'accueil  
en Europe

in decision-making centers  
investments

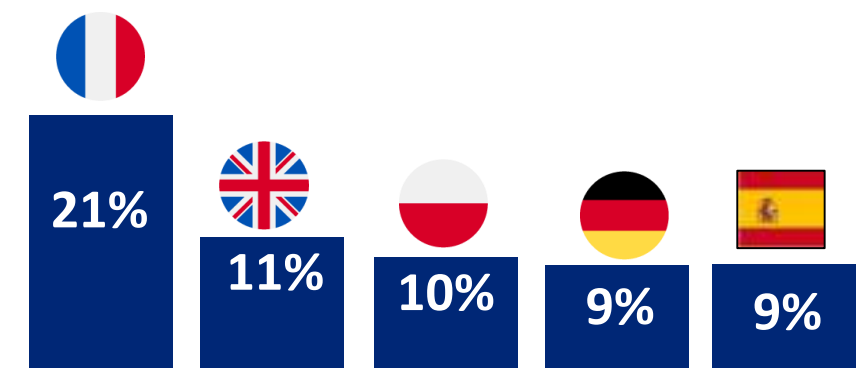


Number of projects in 2018  
*EY, 2019*



**1<sup>st</sup>** host country  
in Europe

in logistics investments,  
ahead of the UK and Poland



% of the European market share  
*Foreign investment in France Annual Report, 2019*

AN ATTRACTIVE COUNTRY

New record in  
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France is moving  
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international  
rankings

Paris, a global  
metropolis

# AN ATTRACTIVE COUNTRY

France is moving up in the international rankings



France gained  
**7** places in 2019

from 22nd to 15th place,  
in the *World Economic Forum Global Competitiveness Report*

*WEF 2019*



**25** French schools  
in the top 100

of *Master's degrees* in management  
3 French schools in the Top 5

*Financial Times 2018*



# AN ATTRACTIVE COUNTRY

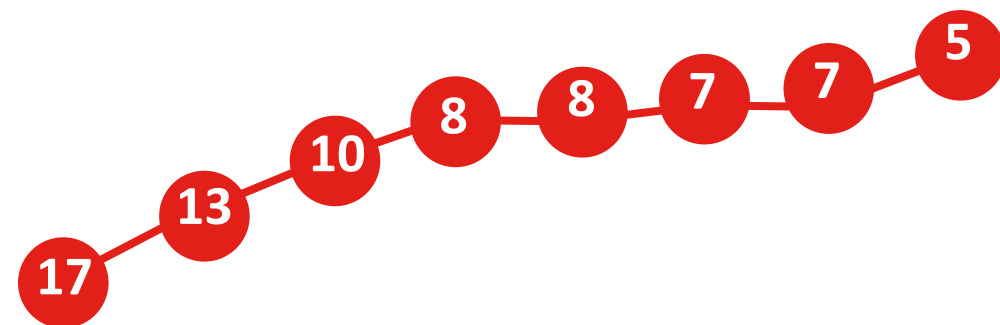
France is moving up in the international rankings



## 5th (up 2 places)

among the 10 most attractive countries in the world over the coming 3 years

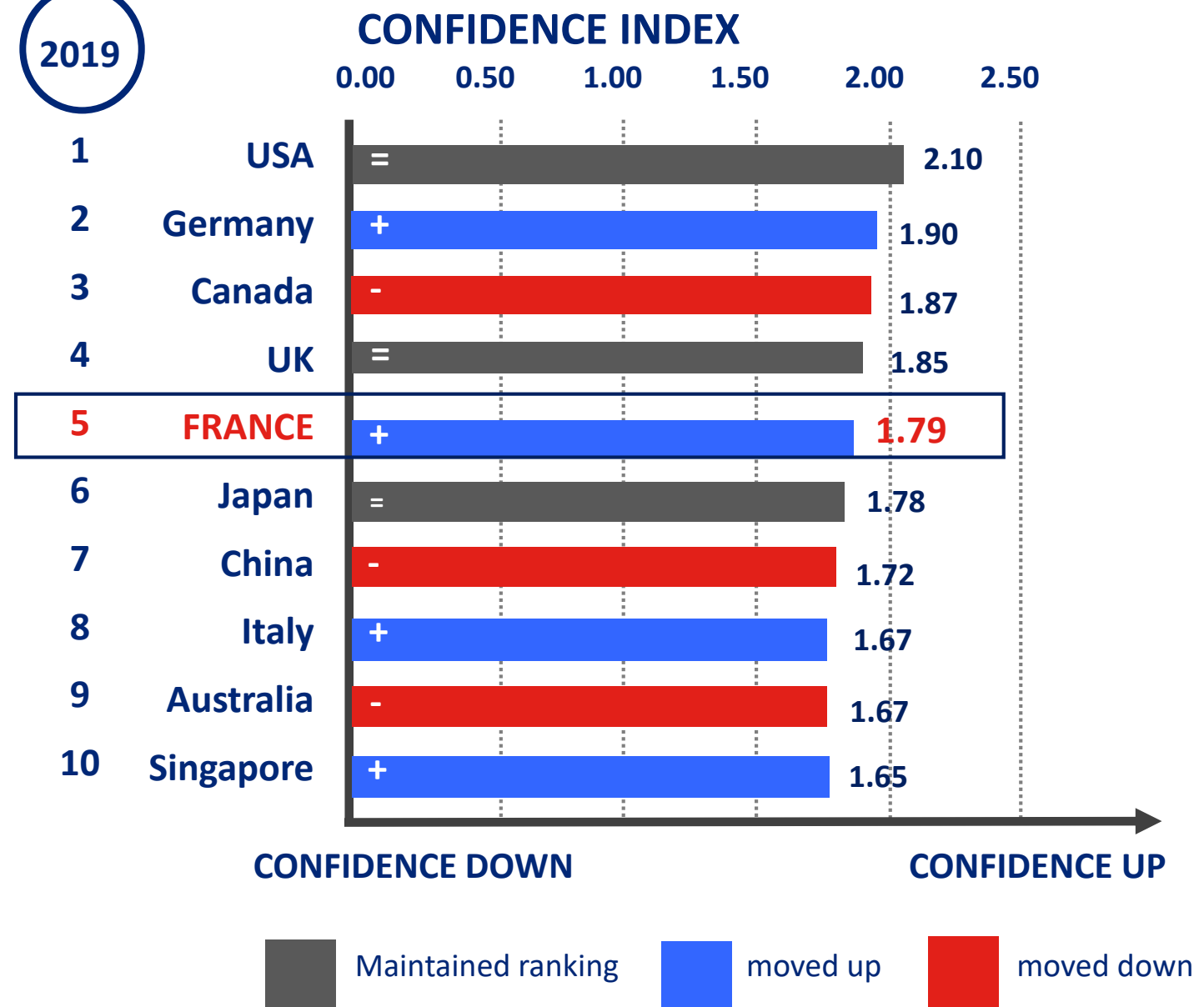
A.T Kearney 2019. : its confidence index of FDI examines the impact of political, economical and regulatory changes on investment intentions and preferences among top managers of the largest firms in the world



2012 2013 2014 2015 2016 2017 2018 2019

Position of France in the AT Kearney ranking, since 2012

2019



Foreign Direct Confidence Index 2019, A.T. Kearney

# AN ATTRACTIVE COUNTRY

Paris, a global metropolis

Choose  
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**2<sup>nd</sup>** most attractive  
city in the world

in international investment volumes  
(12<sup>th</sup> in 2012 and 4<sup>th</sup> in 2017)

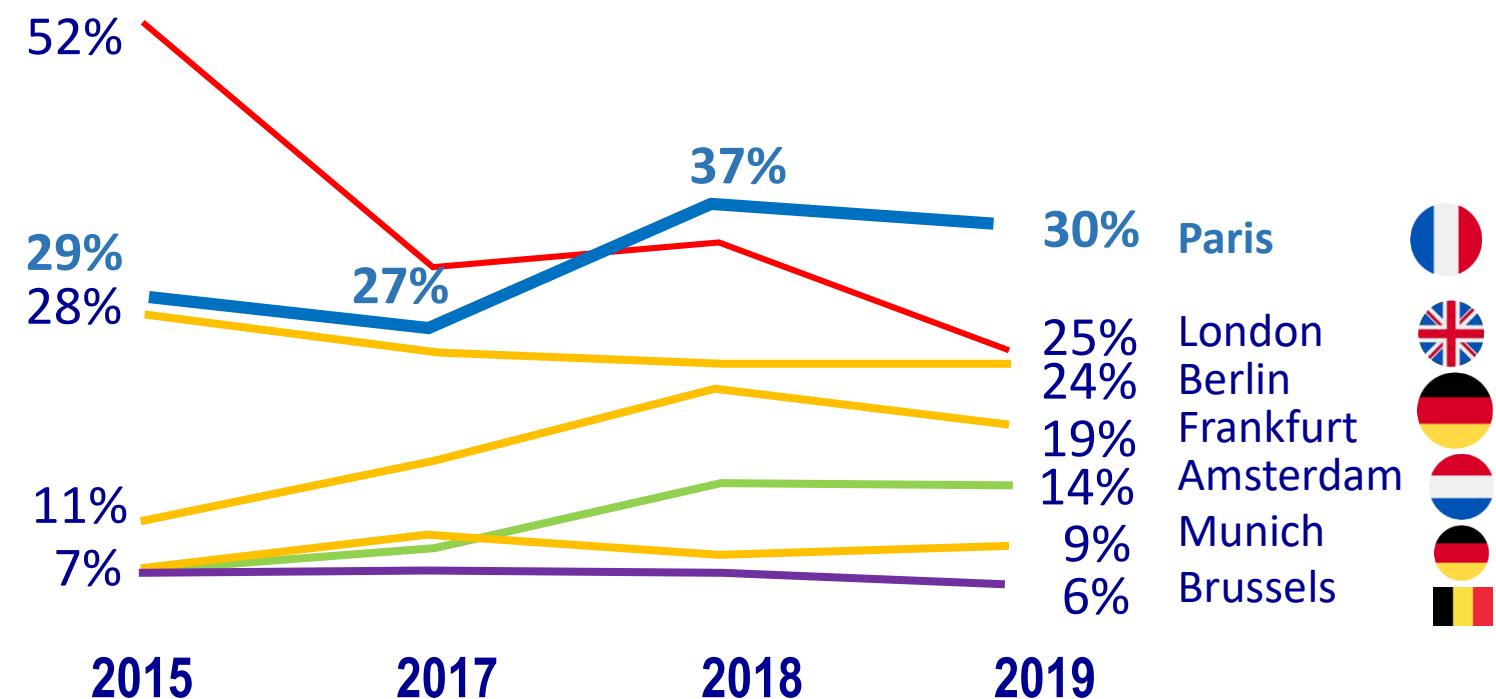
*KPMG, Global Cities Investment Monitor 2019*



**1<sup>st</sup>** global destination  
in R&D

47 projects, ahead of Singapore and  
Bangalore (4<sup>th</sup> in 2016)

Paris tops  
the list of most attractive  
European metropolises



*EY Barometer of France's attractiveness in 2019 (CSA survey, 3 possible responses, February 2019)*

AN ATTRACTIVE COUNTRY

New record in  
FDI decisions

France is moving  
up in the  
international  
rankings

Paris, a global  
metropolis

# AN ATTRACTIVE COUNTRY

Paris, a global metropolis

Choose  
France™



**1st** concentration of  
international Head  
Offices

in Europe 3<sup>rd</sup> around the world  
after Beijing and Tokyo



**1st** European office  
building market

2.34 million sq. m. areas on which a lease  
or sales contract was signed in 2017  
(ahead of London, 1.17 sq. m. and Munich,  
0.99 sq. m.)

*France Attractiveness Scoreboard, 2019*



**1st** urban, social and  
economic project

Greater Paris: 200 km of automatic  
metro lines, 68 stations, 90,000 new  
housing units per year...



**2nd** world  
city

In number of conventions

*International Congress and Convention Association, 2018*

AN ATTRACTIVE COUNTRY

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Paris, a global  
metropolis

# LAND OF OPPORTUNITY

A strategic location

Choose  
France™



**6th** largest economy  
in the world



**4th** largest exporter of service  
in the world (up 7.4%)

8th global exporter  
of products (up 10.6%)



**2nd** European  
market

67 million consumers with a direct  
access to 500 million consumers  
with a high standard of living



**28** French international  
leaders

In the world top 500

*Fortune Global 500, 2018*

A LAND OF OPPORTUNITY

A strategic  
location

An open  
economy

A skilled and  
competitive  
workforce

A welcoming  
ground for  
entrepreneurs

# LAND OF OPPORTUNITY

A strategic location

Choose  
France™



France is an attractive investment destination for  
**88%** of decision-makers

*Kantar Public survey, 2018*



A COUNTRY WITH A GOOD QUALITY OF LIFE :

**1st** OECD country

in terms of health accessibility.

*OECD, 2018*



A COUNTRY OF THE FUTURE:  
**1st** European market

in terms of fertility rate

*Eurostat, 2018.*



Life expectancy

**82.7 years**

among the best worldwide, ahead of Germany, the United Kingdom, the United States, the Netherlands, etc.

*Eurostat, 2018*

A LAND OF OPPORTUNITY

A strategic location

An open economy

A skilled and competitive workforce

A welcoming ground for entrepreneurs



# LAND OF OPPORTUNITY

## A strategic location

Choose  
France™



### France offers a central European location

providing direct access to **500 millions consumers** and **22% of world GDP**, as well as an easy access to EMEA markets (Europe, Middle-East, Africa)



### #1 country in the world for cross-border trade efficiency

thanks to easy and free procedures

*World Bank, Doing Business 2020*

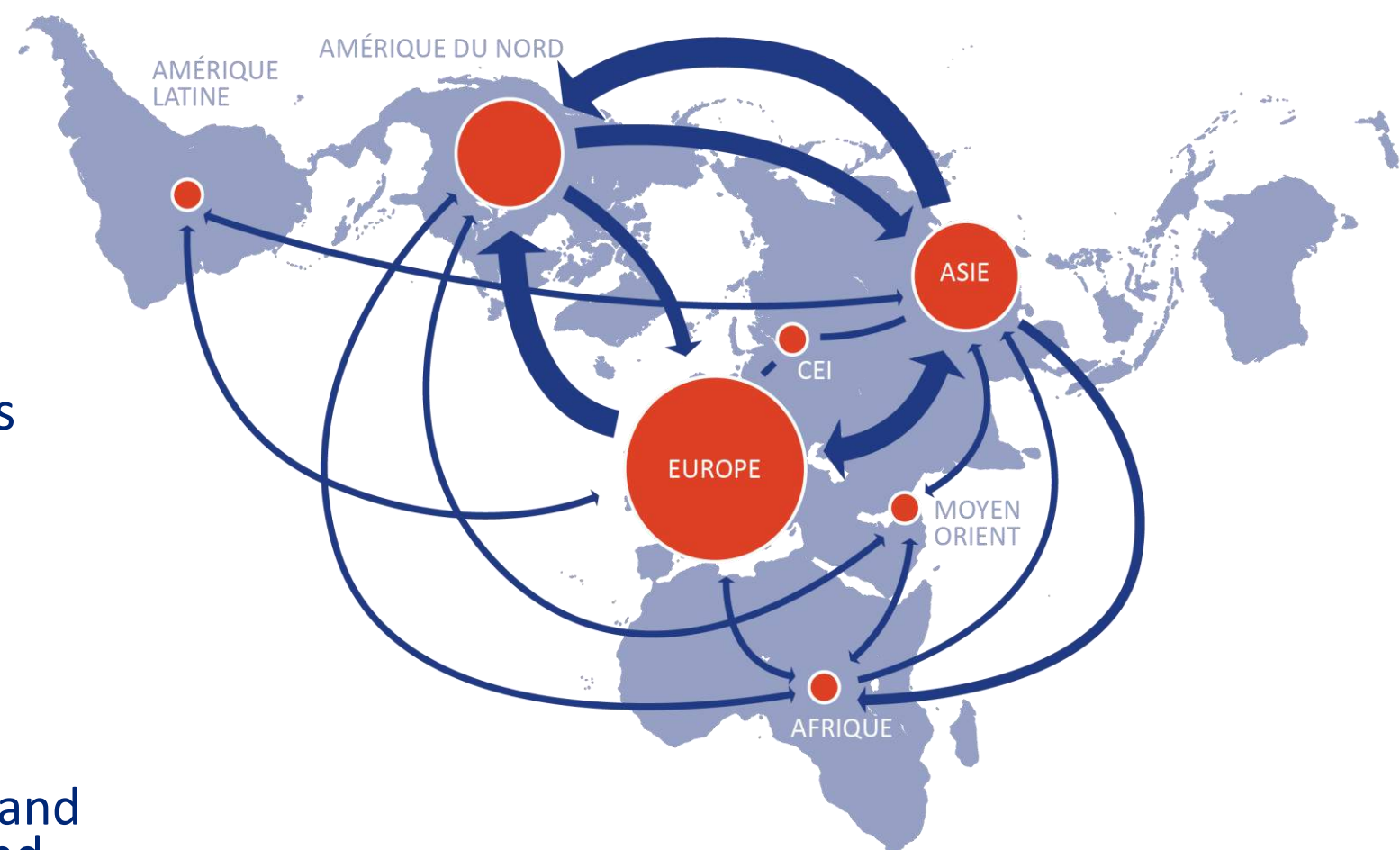


### #4 in the world

ahead of the United Kingdom (10th and Germany (9th), for the availability and quality of freight infrastructure

*WEF – Enabling Trade Report*

## World trade hub



A LAND OF OPPORTUNITY

A strategic  
location

An open  
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A skilled and  
competitive  
workforce

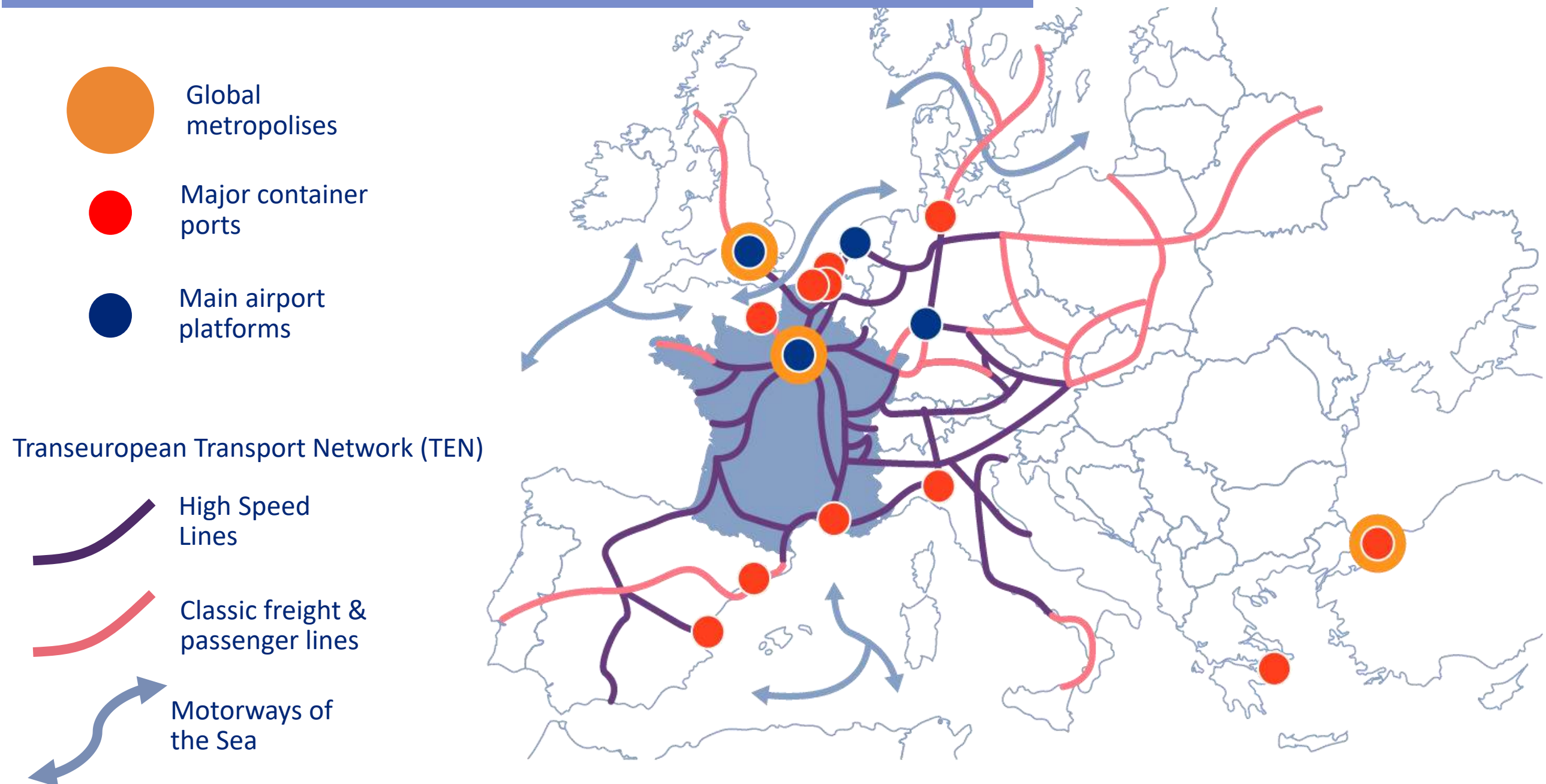
A welcoming  
ground for  
entrepreneurs



# LAND OF OPPORTUNITY

A strategic location

France along the major European trade and communication flows



A LAND OF OPPORTUNITY

A strategic  
location

An open  
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A skilled and  
competitive  
workforce

A welcoming  
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entrepreneurs

# LAND OF OPPORTUNITY

An economy open to the world



**28,000** foreign companies  
established in France account for:



**1%** of all  
businesses



**21%** of French  
GDP



**13%** of jobs  
(2,2 millions)



**25%** of R&D  
expenditure



**17%** of value  
added  
generated by the non-agricultural  
and the non-financial market  
sectors.



**31%** of French  
exports

INSEE

# LAND OF OPPORTUNITY

An economy open to the world

International firms from  
 **108** different  
countries  
have invested in  
France



International companies employ  
**2.2 million** people  
in France

representing 13% of the non-agricultural  
and non-financial market sectors'  
workforce. (1.8 million en 2016)

INSEE

Medium-sized companies account for



**45%** of all jobs created by  
foreign-controlled firms  
Larger firms for 38%.

INSEE

# LAND OF OPPORTUNITY

An economy open to the world



More than  
**45%** of the equity  
of companies  
listed on the CAC 40  
are owned by non-residents



**2nd** country outside  
the Anglosphere  
for hosting international  
students  
*OECD*



**4th** Host country  
in the world  
for higher education :  
343 400 foreign students  
chose France in 2017-2018  
(up 4,5%)  
*OECD*



**40%** of doctoral students  
are foreign students



# LAND OF OPPORTUNITY

A skilled and competitive workforce

Choose  
France™



France is ahead of  
**Germany and the UK**  
for hourly labor productivity

*The Conference Board, 2018*



**Up 2.5%** in hourly  
productivity

in industry in France (up 2.1% in Europe)

*The Conference Board, 2018*

On average, employees in France  
work longer hours than in Germany  
and the United Kingdom



**37.2** hours per week

versus 36.5 and 34.9 hours, respectively –  
and are more productive.

France is ranked ninth in the world for hourly  
labor productivity, ahead of the UK (19th).

*The Conference Board, 2018*

A LAND OF OPPORTUNITY

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competitive  
workforce

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ground for  
entrepreneurs

# LAND OF OPPORTUNITY

## A skilled and competitive workforce



**86%** of leading foreign companies

find France attractive for the skills of its workforce

*Kantar Public, 2018*



**1** million engineers

As many as Germany, which is 24% larger in population.  
38,000 new engineers every years.



**44%** of French people aged 25 to 34

hold a higher education diploma (compared to 31% in Germany and 27% in Italy)

*OECD, Education at a glance, 2017*



# LAND OF OPPORTUNITY

## A skilled and competitive workforce



### Average cost of a researcher in France

among the most competitive in the world:

- 50% compared with the USA,
- 21% compared with Germany
- 17% compared with the UK

*ANRT*



### **+0.9%** A cost competitive workforce

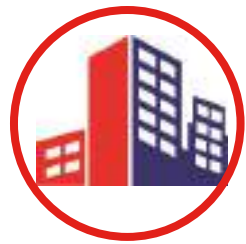
The hourly labor cost has increased on average by 1.1% per year in France since 2013, compared with more than 2% in the EU, 2.6% in Germany and 2.3% in the UK. Hourly labor costs in the French manufacturing sector are competitive: €39.60 in France in the second quarter of 2018 compared with €41 in Germany.

*Eurostat*

# LAND OF OPPORTUNITY

A welcoming ground for entrepreneurs

Choose  
France™



**2<sup>nd</sup>** France was Europe's  
second leading country  
for business creation



**691,000** new companies  
set-up in France  
in 2018 (+17%)

Among which, 28,500 in the industrial  
sector. France was Europe's second  
leading country for enterprise creation.



**37%** of the French want  
to start their own  
business

and 18% are considering setting-up  
a company during the next 3 years

*Baromètre Idinvest 2018,  
Global Entrepreneurship Monitor 2018*

A LAND OF OPPORTUNITY

A strategic  
location

An open  
economy

A skilled and  
competitive  
workforce

A welcoming  
ground for  
entrepreneurs

# LAND OF OPPORTUNITY

A welcoming ground of entrepreneurs

Choose  
France™



Only  
**4** days required to establish  
a company in France

versus 4.5 in the UK and 8 in Germany.

*World Bank, Doing Business 2020*



Reforms in France  
to boost business

- **Unlock business investment** thanks to the reduction in corporate tax (25% by 2022), lower social contributions, a 40% depreciation allowance of investments in robotics and digital solutions for SMEs, in 2019 and 2020, and lower taxes on capital with the introduction of a flat tax (30%).
- **A more flexible and predictable labor market** to boost employment.
- **Skill investment program**: €15 billion aimed to job seekers and young people; two million people will be trained until 2022.
- **Administrative simplification** for businesses and industrial sites.



Only  
**0.7%** The cost of  
procedures

to set-up a business in France (GNI per capita), compared with 1% in the United States and 6.7% in Germany.

*World Bank, Doing Business 2020*

A LAND OF OPPORTUNITY

A strategic  
location

An open  
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entrepreneurs

# A VIBRANT TECH AND INNOVATION SCENE

A talent hub



**1<sup>st</sup>** European country  
in the Top 100  
*Global Innovators*

and **3<sup>th</sup>** country in the world

*Clarivate Analytics, 2019*



**1<sup>st</sup>** leading country  
*Deloitte Technology Fast 500*

97 French companies in the Top 500 tech leaders in the EMEA zone for the 8th year in a row, ahead of the UK (92) and the Netherlands (50)



**1<sup>st</sup>** European host country  
for international  
R&D projects

in 2018 ; **144 (+85%)**, exceeding the UK (74; -17%) and Germany (64; -21%)



**13** **FIELDS Medals**  
earned by French people

out of 60, making France the **1<sup>st</sup>**  
worldwide, alongside the USA.

The excellency of French mathematics is a strength for digital technology and finance.

# A VIBRANT TECH AND INNOVATION SCENE

A talent hub



**5<sup>th</sup>** worldwide in terms of  
patents filed  
(nearly 8,000)

France has also filed **5,393 brands per million inhabitants** (more than the USA)

*OECD, OMPI*



**9.4** French researchers for  
**1,000 active workers**

ahead of Germany (9.3), the UK (8.8) and the USA (8.7)

*OECD PIST, 2018*



**France spends more on R&D  
than on average in the EU**

2.25% of GDP, versus 1.93% for the EU 28, the UK (1.69%), the Netherlands (2.03%) or Italy (1.29%)

*OECD, 2018*



**€57bn**

**National Investment Plan**

**2018-2022**

€13 bn to boost competitiveness through innovation



# A VIBRANT TECH AND INNOVATION SCENE

The best R&D incentive in Europe

Choose  
France™



## **CIR** Best research tax credit in Europe

30% tax credit on R&D up to €100 million,  
5% above this threshold

*OECD, 2017*



## One of the most accessible tech visas in Europe

To attract talents and their families. A  
multiannual residence permit for  
investors, CEO, startups founders,  
foreign entrepreneurs, their staff and  
their families.



## **#1** for public R&D funding

thanks to the research tax credit

*OECD*



## **84%** of foreign companies

think that CIR contributes to R&D  
investments in France

*Kantar public, 2016*

A VIBRANT TECH  
AND INNOVATION SCENE

A talent hub

The best R&D  
incentive in  
Europe

Ambition of a  
'start-up nation'

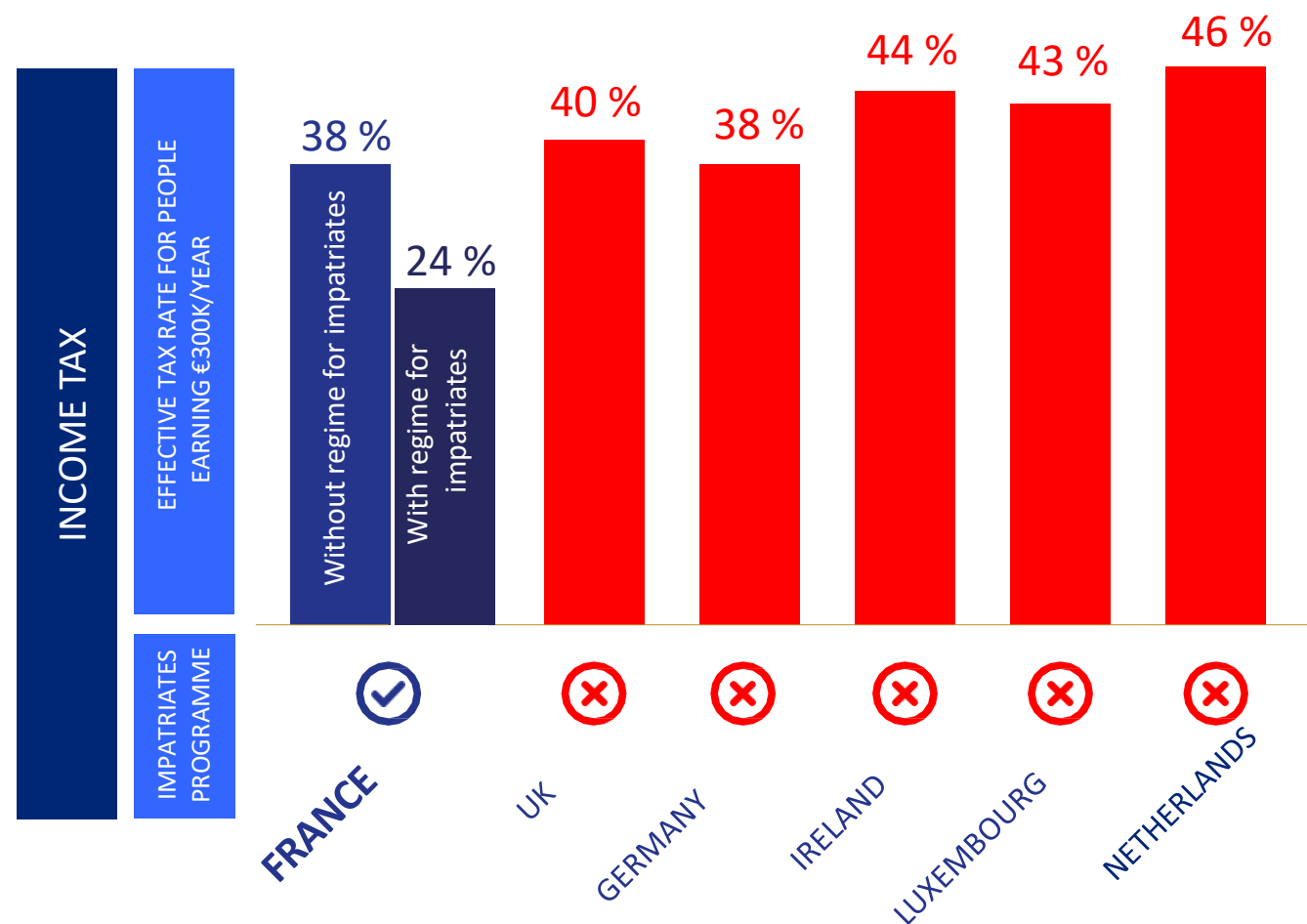
A gateway to  
tech investments  
in Europe



# A VIBRANT TECH AND INNOVATION SCENE

The best R&D incentive in Europe

**The lowest effective tax rate for expatriates**  
Up to 50% of the total remuneration is exempt,  
for a maximum of 8 years



OECD, PwC Worldwide Tax Summaries, Agefi.fr



## Tax status

special for **Young Innovative Companies (YIC)**  
accredited with tax exemptions and charges  
to encourage R&D



**41** bilateral social  
protection agreements



**478** international  
programs

taught in 16 different languages in  
schools across the country

# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'

Choose  
France™



## +10 000

### startups in France

gradually becoming established businesses with  
the financial resources to achieve their goals



## Up 41% of funds raised

by the French startups in 2018

**€3.6bn** raised by French startups in 2018, in  
645 deals (up 41%) ;

€1.4 bn raised by 178 startups during T1 2019,

**France ranks #2 in Europe**

*EY Venture Capital Barometer, Annual results, 2018*



## \$15.56bn

raised by French tech,  
since 2014, in 3,142 deals

*CB Insights, Q1 2019*

A VIBRANT TECH  
AND INNOVATION SCENE

A talent hub

The best R&D  
incentive in  
Europe

Ambition of a  
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# A VIBRANT TECH AND INNOVATION SCENE

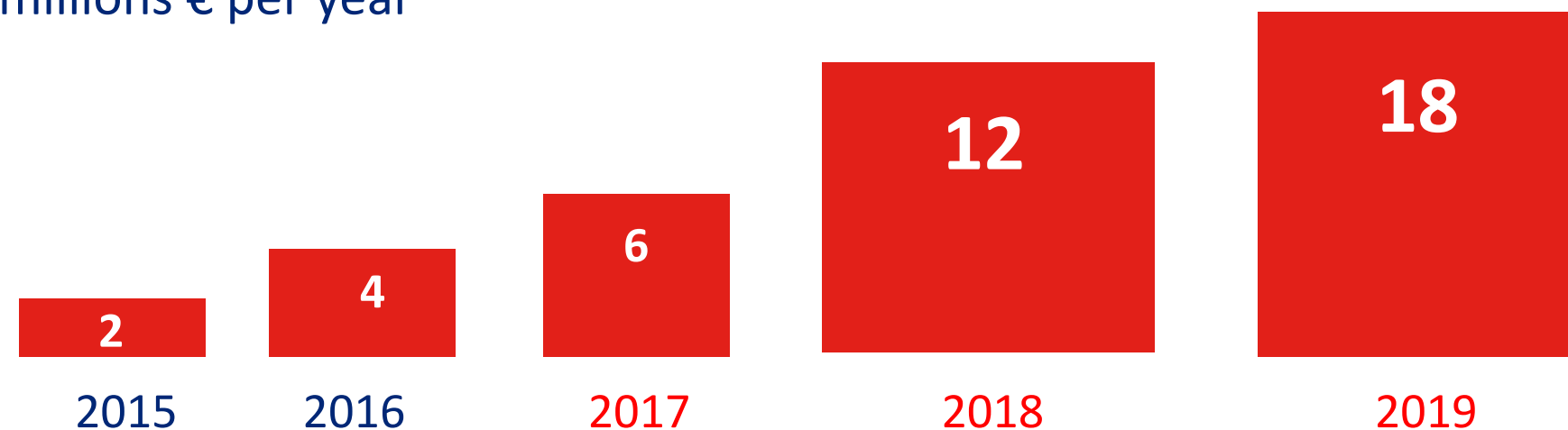
France's ambition to become a 'start-up nation'

Choose  
France™



A new generation of unicorns  
is emerging

Number of deals related to  
French startups and > 40  
millions € per year



Bla Bla Car

believe

Crunchbase

OVH.com

LINKBYNET

sigfox

DEVIALET

ivalua

Actility

Doctolib

younited credit.

BLADE

mano  
mano

DEEZER

OC  
OPENCLASSROOMS

evaneos

Voodoo

SYMPHONY

backmarket

Ledger

recommerce

SCALITY

Dynacure

Klaxoon

Cityscoot

18

2019

(from january to July)

MIRAKL

DENTAL  
MONITORING

Shift  
Technology

CONTENT  
SQUARE

Insect

ManoMano

Doctolib

wynd

alan

La  
FRENCH  
TECH

A VIBRANT TECH  
AND INNOVATION SCENE

A talent hub

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incentive in  
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France's ambition to become a 'start-up nation'

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France™



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# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'

Choose  
France™



An open brand  
of the French  
start-up ecosystem.



14 cities awarded the  
"French Tech cities" label



Setting-up a startup  
in France :

[joinlafrench.tech](https://joinlafrench.tech)



**Grants**  
between €30,000  
and €45,000

Welcome pack for entrepreneurs from  
abroad: Grant / Signature / Local  
"HelpDesk" contact / Settling In Assistance

A VIBRANT TECH  
AND INNOVATION SCENE

A talent hub

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incentive in  
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Ambition of a  
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in Europe



# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'

Choose  
France™



**71** innovation clusters,  
centers of technological  
excellence

financed by public-private partnerships.

<https://competitivite.gouv.fr>



**Ian Rogers,**  
**DIGITAL**  
**OFFICER, LVMH**

*« The ecosystem  
for startup support [in  
Paris] is better in many  
ways than [in] nearly  
any other city in the  
world. »*

*CB Insights*



**Philippe Botteri**  
**PARTNER, ACCEL PARTNERS**

*« “The growth of the tech  
ecosystem in France over the  
past five years has been  
faster than the rest of Europe.  
. . . There’s a compounding  
effect of repeat entrepreneurs  
wanting to reinvest in and  
mentor the ecosystem. »*

**A VIBRANT TECH  
AND INNOVATION SCENE**

A talent hub

The best R&D  
incentive in  
Europe

**Ambition of a  
'start-up nation'**

A gateway to  
tech investments  
in Europe



# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'



**1st** in Europe for the number of groups that have created a laboratory, incubator or accelerator (48% in France, versus 40% in Germany, 25% in the UK)

platform58  
l'incubateur de La Banque Postale



**300** incubators



**50** accelerators



## STATION F

**1st** start-up campus in the world

- 1,000 start-ups over 34,000 m<sup>2</sup> ;
- 3,000 workstations
- +30 acceleration programmes

# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'

**1<sup>st</sup>** **42** Free IT training,  
participatory  
and open to all



France has one of the best  
talent pools,  
thanks to high-level schools  
and innovative training

université  
PARIS-SACLAY



# A VIBRANT TECH AND INNOVATION SCENE

France's ambition to become a 'start-up nation'

**bpi**france **€10** billion  
in funds

to support innovative projects in multiple sectors (AI, ADAS and driverless vehicles, electric vehicles, biotechnologies, nanotechnologies, etc.)



**€35** billion  
for a programme

€22 billion of which is  
intended for higher education  
and research



**A support system**  
for those creating innovative businesses

# A VIBRANT TECH AND INNOVATION SCENE

The French VC market : a gateway to tech investments in Europe



**1<sup>st</sup>** in Europe for  
capital raised by VC

€2.8 billion in 2017, ahead of the UK  
(1.5) and Germany (1.1)

*Invest Europe / France Invest*



**40%** funds in Europe  
managed by French  
PMs

French portfolio managers in  
charge of operating activities for  
40% of funds in Europe



**1/3** of venture capital  
and external growth  
transactions

involve a French investor



**>50%** French VCs  
present abroad



**80+** French portfolio managers  
active in venture capital  
and high-growth technologies

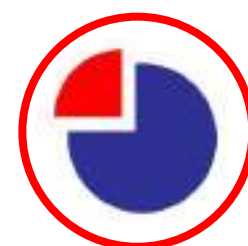
# A WORLD-CLASS INFRASTRUCTURE

Logistics, an essential part of France's strategy  
to develop competitiveness



**348 bn** of ton-kilometers of goods  
transported in France every year

*Source ASLOG, Transportation account 2017 -  
CCTN*



**10%** The share  
of logistics costs  
in the French GDP

1.9 million of workers in France,, in the logistics  
sector, accounting for 10% of the employment in  
the market sector (excluding temporary work)

*DATALAB 2018*



**78  
millions** of sq.m of warehouses  
exceeding 5000 sq. m.

*National Atlas of warehouses and logistics areas*



# A WORLD-CLASS INFRASTRUCTURE

Logistics, an essential part of France's strategy  
to develop competitiveness



## France #4 in the world

ahead of the United Kingdom (10th  
and Germany (9th), for the availability  
and quality of freight infrastructure

*WEF – Enabling Trade Report*



## 6 flagship measures to turn France into a key logistics crossroad

Setting-up a unified approach for companies (carriers, logistics specialists, shippers) and a national working group to guide collaboration between companies, the administration and regional authorities

- **A single border point of contact** including custom services, veterinary and phytosanitary services and the Directorate-General for Competition, Consumer Affairs and Prevention of Fraud.
- **Further simplifications** in the establishment of warehouses facilities procedures will be implemented as from early 2020
- **A digital logistics platform** will be set-up during 2020
- **A study** will be carried out during the first semester of 2020, in order to benchmark European road transport legislations, and propose **further harmonization measures**
- **A new tax system** for industrial premises
- **Implementation of an action plan 2019-2020** for logistics professions.

# A WORLD-CLASS INFRASTRUCTURE

## Transport networks

Choose  
France™



**1<sup>st</sup>** airport  
for cargo

and **2<sup>nd</sup>** for passenger traffic  
(Paris Charles de Gaulle)

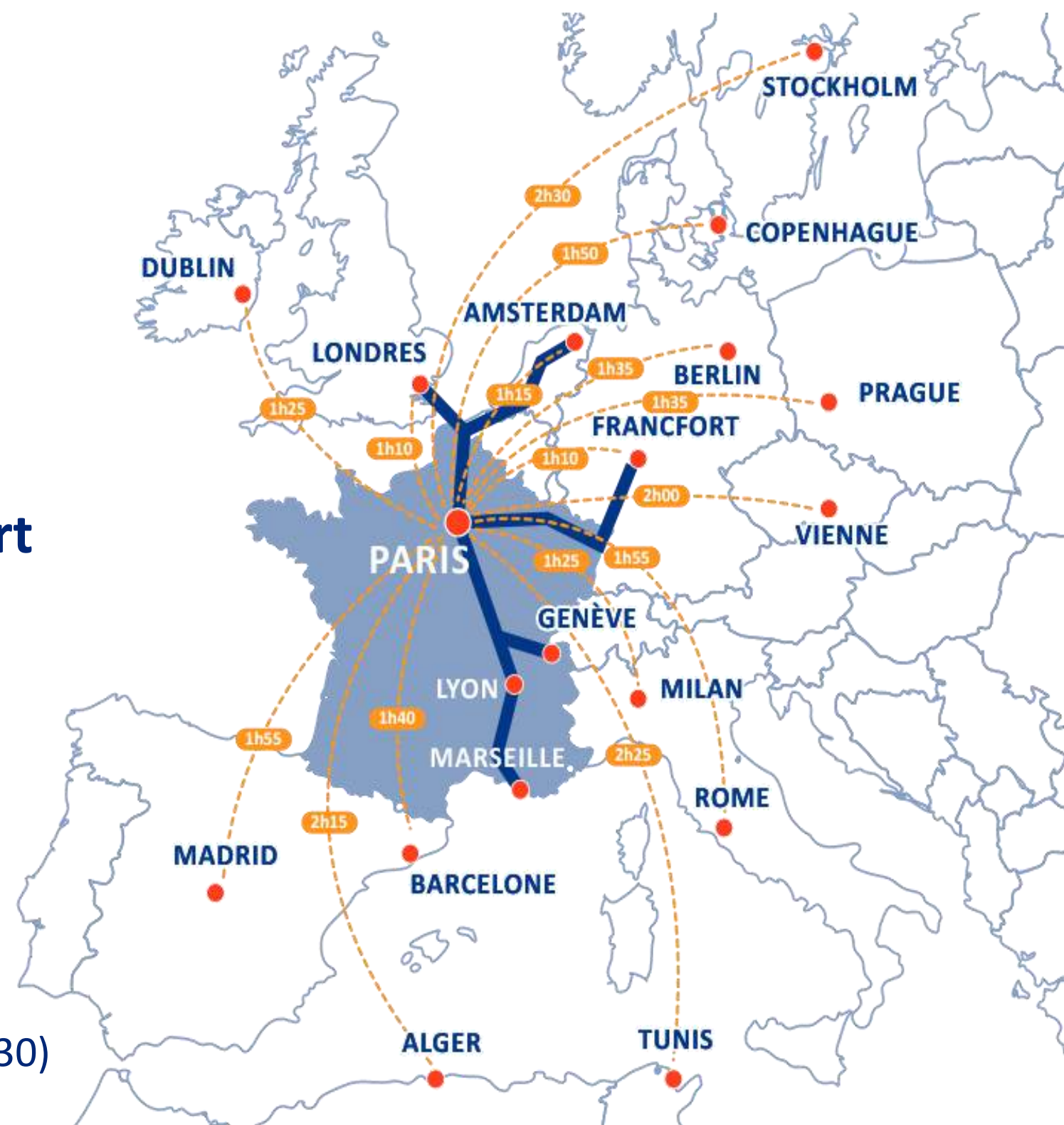


**1<sup>st</sup>** business aviation airport  
in Europe (Le Bourget)



**2h** Paris within less than  
2 hours flight

from most of European capital cities  
(Berlin: 1:35, Milan: 1:25, Madrid: 1:45,  
Prague: 1:35, Dublin: 1:25, Stockholm: 2:30)



# A WORLD-CLASS INFRASTRUCTURE

## Transport networks



**2<sup>nd</sup>** longest high-speed rail network in Europe

TGV, Eurostar, Thalys: Paris-London or Paris-Frankfurt in 1:10; Paris-Amsterdam: 1:15



**5<sup>th</sup>** generation of TGV and autonomous trains

developed by Alstom and SNCF, deployed in France by 2025

*Rail freight corridor through France* ►





# A WORLD-CLASS INFRASTRUCTURE

## Transport networks



### 2 French ports among the top 10

European ports by tonnage:  
Marseille and Le Havre.

*Eurostat, 2018*



### « Best European port » « Best green seaport »

for Le Havre-Rouen-Paris port complex.

*CargoNews Asia, 2017*



### 1<sup>st</sup> European inland waterway freight network



### 1<sup>st</sup> European road system

1 million km of roads.

3<sup>rd</sup> longest European motorways  
network (11600 km)

*Eurostat, 2017*



# A WORLD-CLASS INFRASTRUCTURE

## Energy

Choose  
France™



**1<sup>st</sup>** country in  
the world

for the quality, availability and accessibility  
of its electric supply.

*WEF, The Global Energy Architecture Performance Index Report*



**3<sup>rd</sup>** best-equipped  
country in the world

for the energies of tomorrow.

*WEF, The Global Energy Architecture  
Performance Index Report*



**€0.1765**/kWh

Competitive electricity rates  
for industrial use in France, far below  
the European average:

€ 0.2839 /kWh in Belgium,  
€ 0.2984 /kWh in Denmark,  
€ 0.3088 /kWh in Germany

*Eurostat (2020)*



**50%** less expensive  
than the UK

cost of access to electricity half  
that of the UK

*Eurostat*



# A WORLD-CLASS INFRASTRUCTURE

## Connectivity



**98%**

of the population was covered by 4G in the second quarter of 2018

100% en 2022.



**1<sup>st</sup>**

France has more public Wi-Fi hotspots than any other country in the world

13 million (9.8 in the US, 5.6 in the UK)

iPass, 2018



**€20 billion** in public and private investments

for the Superfast Broadband Plan (THD).

Objective: **to cover the entire territory by 2022.**

Prioritising areas of economic activity for fibre coverage.



**3<sup>rd</sup>**

in Europe for fixed superfast broadband

The price of broadband internet access is \$37/month, less than in the UK. (\$41) or in the US (\$61). Mobile broadband rates (\$18) are lower than in Germany (\$38)

OECD Broadband Statistics, 2018



**#2**

fixed broadband Internet penetration

among 141 countries,

WEF Global competitiveness Report 2019



**#4**

country in the world

for the number of fixed broadband subscriptions: 41.4 per 100 people (compared with 38.6 in Germany and 38.5 in the UK)

OECD Digital Economic Outlook, 2017

# THE PLACE TO BE FOR...



**Industry of the future**  
Innovation the French way



**Agri-industry**  
in the home of  
gastronomy



**Health industries**  
at the heart of French  
ambitions



**Paris**  
A prime financial  
marketplace

# THE PLACE TO BE FOR

## Industry of the future

### Innovation the French way



**28,000** companies  
created in  
industry

in 2018. France has 216,000  
companies in the manufacturing  
industry.



**1<sup>st</sup>** host country for  
investment in  
industry



**71** centres of  
excellence

financed by public-private  
partnerships



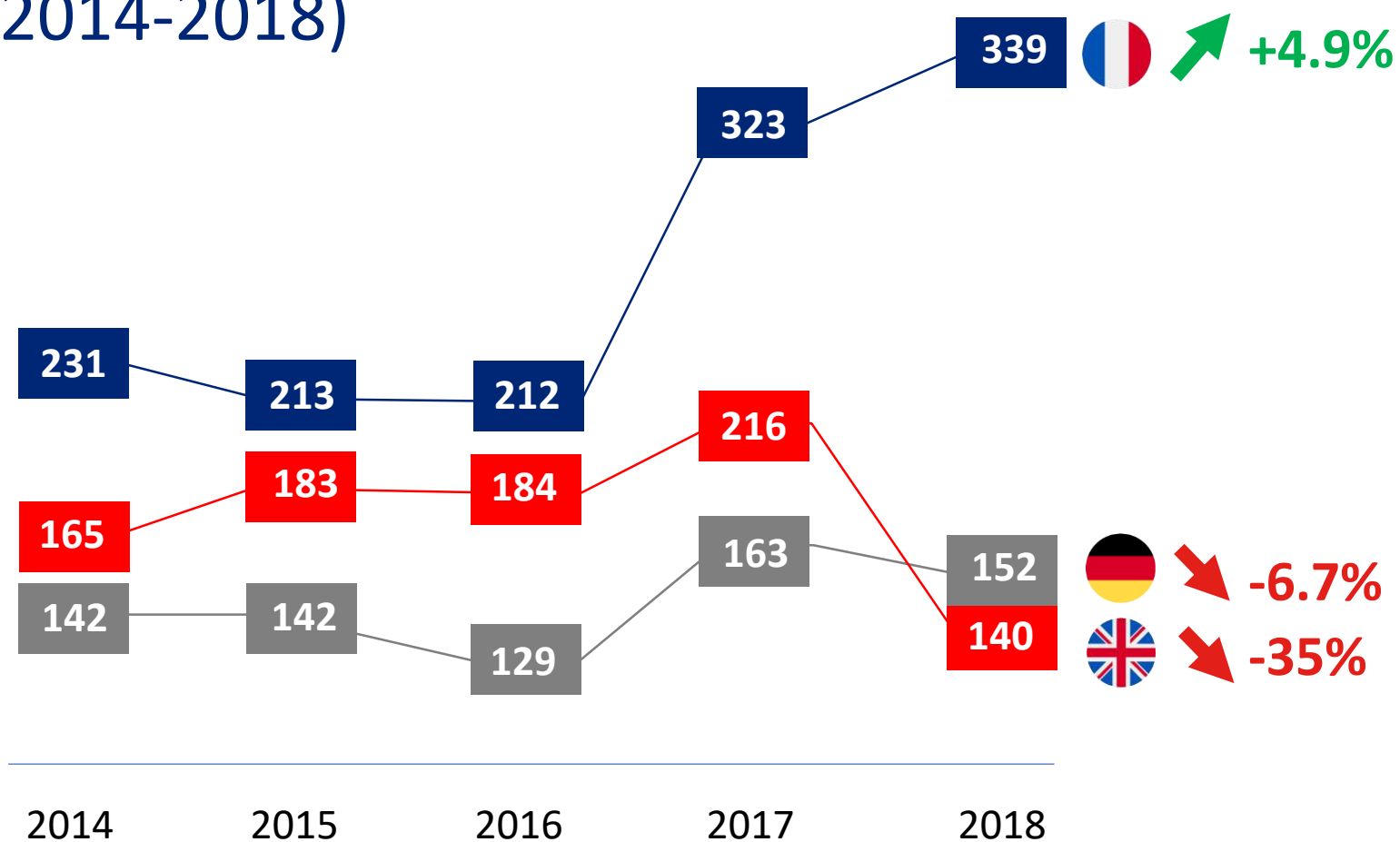
**72%** R&D  
expenditure

of companies in France are made  
in industry

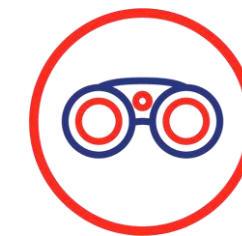
# THE PLACE TO BE FOR

## Industry of the future

### Compared industrial FDI between France, the United Kingdom and Germany (2014-2018)



Source: EY European Investment Monitor



In 2018, the French industry perception among international investors remained **positive**

**70%** of foreign company directors are optimistic about the outlook for French industry

EY, Barometer of French industry's attractiveness, 2020

# THE PLACE TO BE FOR

## Industry of the future

Choose  
France™

### Innovation the French way



**€39.6** hourly cost  
of French labour

in the manufacturing industry (2018),  
versus €41 in Germany.

Since 2013, it has grown by an average of  
1.1% per year, in France (2% in the EU)

*Eurostat*



**42%** of industry  
turnover are  
generated by  
export



**French players leading the  
global market**

Airbus, Total, Orange, Sanofi, LVMH,  
L'Oréal, Danone, Thalès, Safran, Alstom,  
Renault, PSA, Technip...



**3.5%** growth  
in French  
exports  
of manufactured goods in value terms.

THE PLACE TO BE

Industry  
of the future

Artificial  
intelligence

Aeronautics  
and  
space industry

Renewable  
energies &  
environment

Smart city &  
smart  
mobility

The car of  
tomorrow




...



# THE PLACE TO BE FOR

## Industry of the future

### Top 3 European investment in the industry of the future 2016-2019

	Foreign	Domestic	Total
	590	122	712
	271	145	416
	185	107	292

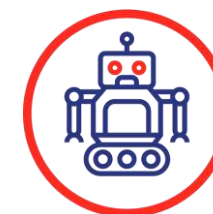
Number of projects in the factory of the future by investor nationality, both abroad and domestically 2016-2019.  
(read: French companies announced 416 investments between 2016 and 2019, 145 of which in France, and 271 outside France).

*Trendeo, 2019*

### A strong national support for industries of the future in France

An action plan for the digital transformation of the industry was created in 2018 with 3 main components:

- a 40% depreciation allowance of investments in robotics and digital solutions for SMEs,
- the creation of acceleration platforms for industrial technologies,
- support for the digital transformation of 10,000 SMEs by 2022.



## 80% of French industrial

companies have already begun transforming their models and 1 in 2 companies have formalized their roadmap to this change.

*EY Industry of the future Barometer 2018*

# THE PLACE TO BE FOR

Industry of the future

Choose  
France™

## Innovation the French way



Launched in October 2017, FRENCH FAB brings together industry players in France under a single banner.

- **Speed up the transformation** of industry and maximise the value of know-how
- **Join** the French industrial ecosystem
- **Embody the future** of French industry
- **Encourage the influence of French industry** internationally to attract talent and foreign capital

THE PLACE TO BE

Industry  
of the future

Artificial  
intelligence

Aeronautics  
and  
space industry

Renewable  
energies &  
environment

Smart city &  
smart  
mobility

The car of  
tomorrow

...

# THE PLACE TO BE FOR artificial intelligence

Choose  
France™



**68** AI research  
laboratories

4 Interdisciplinary institutions  
with IA certification.



**13,000** AI  
experts

**AI** FOR  
**HUMANITY**

**A national ambition** to unlock the potential  
of French research and develop AI, while  
considering social and environmental issues,  
with an investment of €1.5 billion over five  
years and €500 million in private financing.



**x2** France is doubling its  
computing capacity

for AI, thanks to the "Jean Zay" computer  
installed in 2019 at IDRIS, the CNRS  
national computing centre.

THE PLACE TO BE

...

Artificial  
intelligence

Aeronautics  
and  
space industry

Renewable  
energies &  
environment

Smart city &  
smart  
mobility

The car of  
tomorrow

...

# THE PLACE TO BE FOR artificial intelligence



**+79%** growth in  
financing

Deep Tech in France: \$912 M in 2018,  
making France 2<sup>nd</sup> in Europe

*Dealroom*



**#1** Continental European  
country in terms of  
attractiveness for AI

*Artificial Intelligence – A strategy for European  
startups, ROLAND BERGER, ASGARD, 2018*



**+40%** in  
fundraising

between 2017 and 2018 with €376m  
raised by 340 AI startups in France  
(+40% compared to 2017)

*Cap Gemini*



**#1** in Europe  
for AI patents

filed between 2011 and 2016

*La French Fab*



**#2** in Europe  
for DeepTech

funding: US\$ 502 million  
in 2017

*La French Fab*

# THE PLACE TO BE FOR artificial intelligence

## AI is on the rise in France



### **PARIS** : a major point of attraction for AI innovation

through active research in AI and  
polarisation of AI players.  
Reinforced polarisation by the  
launch of the “IA 2021” Plan



### **2/3** AI startups located in Paris

Paris hosts the AI R&D centres of  
FACEBOOK, GOOGLE, and the PRAIRIE  
Institute (PaRis Artificial Intelligence  
Research InstitutE)

*Artificial Intelligence: State of the art and prospects for  
France, Atawao Consulting, 2018*



### **Paris** **#2** AI talent hub in Europe

with + 80 higher education  
programs in 2018

*La French Fab*



### **45%** public and private AI labs

concentrated in the Greater Paris area



# THE PLACE TO BE FOR aeronautics and space industry



**1<sup>st</sup>** European player  
in aeronautics

and aerospace. And 2nd worldwide.  
1,000 companies, 190,000 people



**3** centres of  
excellence

Aerospace Valley, ASTech Paris Region, SAFE  
Cluster **2 technological research institutes**  
(IRT). **1 space launch base** with **3 launchers** :  
Ariane 5, Soyouz and Vega.



**85%** of revenue  
from export

France is the only country along with  
the USA to have a comprehensive  
aeronautical industry expert in the  
entire aircraft or satellite production  
chain.



**12%** in turnover  
dedicated to R&D

**21%** of researchers in France dedicated  
to aeronautics.



**+24** new industrial  
sites

between 2009 and 2019

Trendeo



**10,000<sup>th</sup>** aircraft  
delivered

# THE PLACE TO BE FOR renewable energies & environment



**#2** largest renewable  
energy producer

among the EU-28.

*EurObservER*



**France's goal:**

the share taken by renewable  
sources in the energy mix  
must reach 23%  
by 2020 and 32% by 2030



**#3** European  
employer

in the renewable energy  
sector, with more than  
140,000 jobs

*EurObservER*



**+133** new waste  
management sites

between 2009 and 2019

*Trendeo*

# THE PLACE TO BE FOR

the *smart city* and *smart mobility*



**€21.6 billion** in turnover

in the *smart city* and building of the future, and 131,000 jobs, in 2015.



**2** clusters dedicated to the sustainable city



**+ €4.5 billion** in turnover per year

in *smart mobility* and 45,000 direct jobs.

ATEC ITS France

# THE PLACE TO BE FOR the automotive industry



**€155** billion  
in turnover

€49bn of exports in 2017



**4,400** manufacturing  
sites

440,000 jobs



**1<sup>st</sup>** secteur

in terms of patent applications



**7.2%** growth  
in production

French automotive in 2018

# THE PLACE TO BE FOR

The car of tomorrow

Choose  
France™



**MAJOR INVESTMENT PLAN** to develop  
the electric, hybrid and autonomous vehicle sectors



**1 million** electric  
and hybrid vehicles

for rechargeables in 2022

207,000 electric and hybrid vehicles  
already in France in 2018



**€700 million** to develop  
the electrical batteries sector



**2021 :** Autonomous and  
connected vehicles

Autonomous on-demand transport  
service



**100,000** public charging  
points in 2022

Already 180,000 private charging  
points in 2019

THE PLACE TO BE

...

The car of  
tomorrow

Software and  
digital  
industry

Health  
industry

Agri-food

Paris, a prime  
financial  
marketplace



# THE PLACE TO BE FOR

## Software and digital industry



**1<sup>st</sup>** concentration of  
software publishers  
in Europe

and 415,000 data  
and software professionals



**1<sup>st</sup>** country in Europe  
for open source  
and open digital

in absolute value on the IT market



**€54** billion  
revenues in ICT

12% growth in software.

9.2% growth for IT and electronic  
products.

**28% growth for personal software and  
video games**



**7** clusters dedicated  
to ICT



**THE ONLY  
EUROPEAN  
COUNTRY**

to have 2 IXP world class hubs

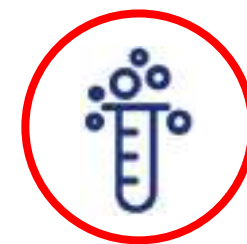
# THE PLACE TO BE FOR health industry,

Choose  
France™

At the heart of French ambitions



**€90 billion** in revenue  
of which 35% export



**20%** R&D investments

by companies in France concern health.  
30,000 researchers (15% of the French  
R&D workforce)



**3<sup>rd</sup>** Export sector  
in France



**400** manufacturing  
sites

3,100 companies and 450,000 direct  
or indirect employees

THE PLACE TO BE

...

The car of  
tomorrow

Software and  
digital  
industry

Health  
industry

Agri-food

Paris, a prime  
financial  
marketplace

# THE PLACE TO BE FOR health industry,

At the heart of French ambitions



**1<sup>st</sup>** European country  
for investments

In health-related R&D. €2.2 million  
for the “My Health 2022” plan



**2<sup>nd</sup>** Health Research  
Institute worldwide

Inserm, which is also the leader when it  
comes to filing patents in biotechnology  
in Europe

*Scimago*



**1<sup>st</sup>** European country  
in number of patents

filed in the medical field



**6** competitiveness clusters  
dedicated to public health

# THE PLACE TO BE FOR

health industry,



 **+55,000**  
students in health



**38** universities  
offer training

in healthcare. University of Paris 6 / Pierre and Marie Curie, the most innovative  
*Reuters ranking, 2017*



**13** Nobel Prize  
in Medicine  
or physiology



**Paris**  
is to host the European program  
Venture Center of Excellence  
« Healthcare »

to facilitate the financing of startups and companies in the healthcare sector.  
The Paris Region will be at the cutting edge of healthcare technologies

# THE PLACE TO BE FOR pharmaceutical industries



**5<sup>th</sup>** global pharmaceutical  
market

3,100 companies and 200,000 direct jobs



**€4.5** billion  
invested

in R&D



**€54** billion  
in revenue

260,000 companies

99,000 direct jobs in 2017



# THE PLACE TO BE FOR pharmaceutical industries



**+6.6%**

**increase in  
pharmaceutical  
production**

in 2017 (gaining pace) after average  
annual growth of 2.3% between 2010  
and 2016



**€30 billion  
in exports**

French pharmaceutical  
companies in 2018



**4<sup>th</sup> exporter of  
vaccines worldwide**

# THE PLACE TO BE FOR biotechnology

Choose  
France™



**1<sup>st</sup>** European biotech  
stock market

Euronext Paris

is the 2<sup>nd</sup> in the world after the USA



**€67 billion**  
in turnover

for the French biotech sector and 330,000  
jobs in 2016

*DARES/LEEM*



Ranked  
**2<sup>nd</sup>** in Europe

for the number of biotech products in  
development and 3<sup>rd</sup> for the number of  
biotech companies



**13** centers of excellence  
and clusters

dedicated to the biotech sector with  
330,000 jobs in 2016.

<http://competitivite.gouv.fr>

THE PLACE TO BE

...

The car of  
tomorrow

Software and  
digital  
industry

Health  
industry

Agri-food

Paris, a prime  
financial  
marketplace

# THE PLACE TO BE FOR clinical research



**The only country in  
Europe**

in the world Top 10 health  
research centres



**10%** of international  
studies

clinical research conducted in France (45% of  
oncology and oncohaematology trials).  
Other major areas: infectious diseases and rare  
diseases



**28** dedicated clinical research  
centres

and 36 clinical investigation centres

# THE PLACE TO BE FOR medical devices



**2<sup>nd</sup>** european  
player

for medical technologies and  
devices **4<sup>th</sup>** worldwide

*IPAME, 2017*



**3.5** at 5% annual  
growth

in the sector since 2010

*DGE, LEEM*



**30%** increase  
in number

of companies in 6 years.



**€28** billion  
in turnover

for the medical devices sector in  
France, of which €8 billion in exports.  
1,343 companies (92% of SMEs).  
85,000 employees, 50% of whom are  
employees of subsidiaries of foreign  
companies

*DGE, LEEM, SNITEM, 2018*



**9** competitiveness  
clusters

1 in 2 companies has R&D activities.  
1 in 3 participate in collaborative projects.  
5<sup>th</sup> place worldwide in terms of patent filings

*SNITEM, 2018*

# THE PLACE TO BE FOR

health industry,

At the heart of French ambitions



Brand launched in March 2017 to bring together healthcare players in France, promote the sector's strengths and coordinate the supply of goods and services.

3 objectives :



- To **communicate and promote French expertise** in terms of health



- To **coordinate** French companies in the foreign healthcare sector



- To **promote the attractiveness** of France in terms of health among foreign investors



# THE PLACE TO BE FOR agri-food,

Choose  
France™

In the home of gastronomy



**€166 billion**  
in turnover

17,200 companies and 85,000 employees.  
1<sup>st</sup> industrial sector in France



**20%** of France's  
industrial turnover

*Insee, Agreste*



**French  
gastronomy**

Registered as part of UNESCO's  
World Intangible Heritage

**Top 100** best restaurants by  
country ranked by *LA LISTE*



THE PLACE TO BE

...

The car of  
tomorrow

Software and  
digital  
industry

Health  
industry

Agri-food

Paris, a prime  
financial  
marketplace

# THE PLACE TO BE FOR

agri-food,

In the home of gastronomy



**1<sup>st</sup>** agricultural producer in Europe

in value terms (€70.3 billion)



**4<sup>th</sup>** exporter worldwide

UN Comtrade



**1<sup>st</sup>** agricultural surface across Europe

1<sup>st</sup> European producer of cereals and sugar beet, 1<sup>st</sup> bovine herd



**1<sup>st</sup>** exporter of wine worldwide



**2<sup>nd</sup>** rank in European agri-food



**French giants in agri-food industry**

Danone, Lactalis, Pernod Ricard, Sodial

# THE PLACE TO BE FOR agri-food,

In the home of gastronomy



**+60%** of surface  
engaged in  
organic farming  
between 2011 and 2016, and 82%  
for the organic food market.



**3<sup>rd</sup>** agricultural equipment  
manufacturer in Europe  
5<sup>th</sup> exporter worldwide Multiple centres  
of excellence drive the sector and  
stimulate innovation



**2<sup>nd</sup>** agricultural research  
institute worldwide

340 patents, 250 laboratories, 13,000  
employees.  
Other world-class research institutions  
such as CNRS, INRIA, etc.



**2<sup>nd</sup>** market  
for robotics

Agriculture is France's 2nd-largest  
market for service robotics. By 2035,  
50% of the agricultural equipment  
market will be driven by robotics sales,  
of which 20% will come from  
autonomous tractors

*Axema*

# THE PLACE TO BE FOR

agro-food,

In the home of gastronomy

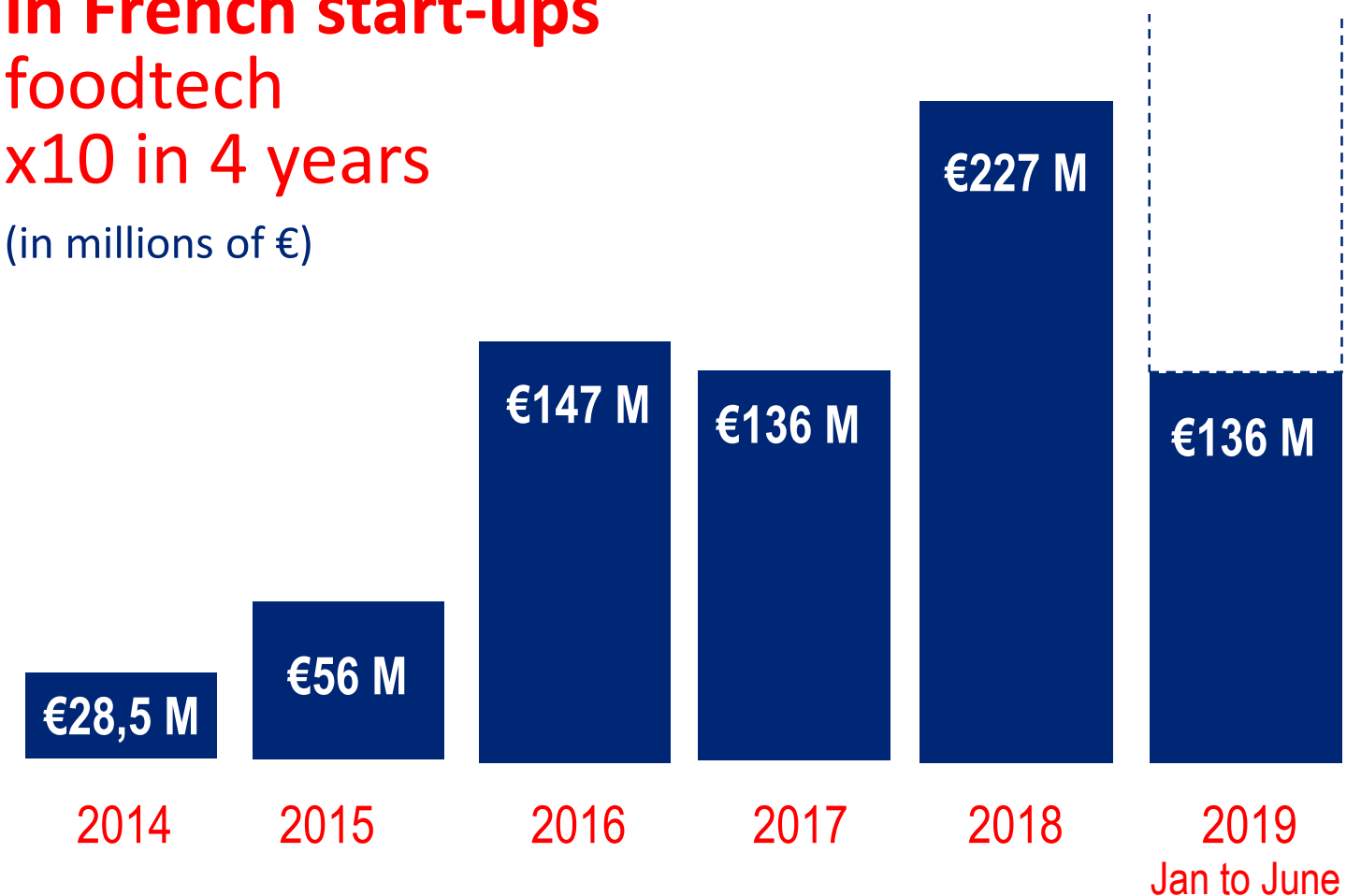


**+500**

agtech/foodtech  
startups

**Investments  
in French start-ups  
foodtech  
x10 in 4 years**

(in millions of €)



*FoodTech in France, DigitalFoodLab, 2019*

THE PLACE TO BE

...

The car of  
tomorrow

Software and  
digital  
industry

Health  
industry

Agri-food

Paris, a prime  
financial  
marketplace

# THE PLACE TO BE FOR agro-food,

In the home of gastronomy



**64** new projects  
in 2018

319 projects between 2014 and 2018. 1  
of the top 5 sectors generating FDI in  
France



**1<sup>st</sup>** country in Europe in  
number of deals in  
foodtech

341 between 2014 and 2018 (223 for  
the UK, 67 for Italy, 64 for Germany  
and 63 for Spain)

*Foodtech in Europe, Digital FoodLab, 2019*



**+77%** FDI  
projects  
in 10 years



# PARIS

a prime financial marketplace



## 1<sup>st</sup> Banking marketplace in Europe

500 banking institutions in Paris  
7 French banks manage 24% of EU banking assets and are in the top 25 in Europe

*The Banker*



## 1<sup>st</sup> Eurozone stock exchange :

Euronext



## 5 French banks in the top 10 in Europe

of which 2 in the top 3: BNP Paribas (2nd) and Crédit Agricole (3rd). Paris is home to 4 of the world's top 20 banks.

*S&P*

THE PLACE TO BE

...

The car of tomorrow

Software and digital industry

Health industry

Agri-food

Paris, a prime financial marketplace

# PARIS

a prime financial marketplace



**1<sup>st</sup>** in Continental Europe for  
asset management

630 companies specialising in asset  
management, of which 4 in the top 25  
worldwide

*AFG, 2019*



**2<sup>nd</sup>** European country in  
terms of venture  
capital transactions

in number of transactions carried out  
(645), after the UK (703), but ahead of  
Germany (598)

*Baromètre du capital-risque en France, EY, 2019*



**800,000** direct jobs in the  
financial sector

Head office of **ESMA** (European Securities and  
Markets Authority) and **the European  
Banking Authority**

# WHY they chose France



**Sheryl Sandberg**  
**COO, FACEBOOK**  
22nd january 2018

*« Paris has been the center of our AI research hub in Europe for a while. »*



**Bill McDermott**  
**CEO SAP,**  
22nd january 2018

*« SAP announced the acquisition of a very innovative company and a bold commitment to a few billion dollars in spend in France »*



**Tatsuya Tanaka**  
**PRESIDENT FUJITSU,**  
29th january 2017

*« France represents la nouvelle vague of technology. »*



**Vasant Narasimha**  
**CEO, NOVARTIS**  
22nd january 2018

*“We choose France because of the great talents we find in the country”*



# WHY they chose France



Virginia Rometty  
CEO IBM,  
23rd may 2018

*« [we are] in great support for the commitment France has made about being a technology leader in AI and a great place for businesses like ours. »*



Satya Nadella  
CEO MICROSOFT

*« [France] is a country that is at the forefront of defining what this new era of technology will mean to our society ... globally. »*



Bob Iger,  
CEO THE WALT DISNEY COMPANY,  
27th february 2018

*« This [\$2 billion] investment is the result of our confidence in the economy of Europe and in France in particular. »*



John Chambers,  
FORMER CHIEF EXECUTIVE  
OFFICER,  
CISCO SYSTEMS

*« When I said three and a half years ago that France would be the tech leader in Europe, nobody believed that and it's happening. »*

# WHY they chose France



**Dara Khosrowshahi**  
**CEO, UBER**  
23rd may 2018

*« With world-class engineers, and a unique skillset in aviation, we think that Paris is the perfect place to advance our Uber elevate program. »*



**Charlotte Hogg,**  
**CEO, VISA**  
23rd may 2018

*« France is rapidly becoming one of the most exciting places to work for digital. »*



**Sunder Pichai,**  
**CEO GOOGLE**  
22nd january 2018

*« France has all assets to succeed.  
It has top engineers, great entrepreneurs, one of the best education systems in the world, great infrastructure, and successful global companies.  
We will rely on the tradition of France in mathematics, science and arts. »*



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