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Benefit from State-of-the-Art Infrastructures

A World-Class Real Estate Offer

Companies and investors find highly selective and great opportunities in Paris Region, the largest scope of Real estate solutions: offices, third places, logistics.... Besides, the ongoing Grand Paris Express Project will offer better connections to urban and business centers, international airports, and high-speed train stations.

A Gateway to Europe and The World

With 25,000 kilometers of roads, three international airports, seven TGV stations, and Haropa Port, Paris Region is a major transportation hub with excellent links to the rest of the world, making it easy for businesses to reach customers and markets, both in France, Europe and internationally (African, Asian, American... Markets).

A Growing and Environmentally Friendly Mobility Network

Sustainable development is based on more environmentally friendly mobility. The modes of transport for journeys between home and work are changing. Paris Region is a Region with major public transport infrastructures. As the Region prepares to host the 2024 Olympic & Paralympic Games, the network continues to develop, particularly through the construction of the Grand Paris Express.

Very Competitive Telecom and Energy Costs

France benefits from state-of-the-art telecommunications and energy networks, which enable it to offer advantageous costs to individuals and companies.

Europe's Largest Scope of Real Estate Solutions

With a real estate market offering of 55 million m², Paris Region is a constellation of diverse, specialized districts that make it a highly attractive location for a range of industries, research areas, and lifestyles.

The real estate market has recently transformed as companies rethink the traditional office model in favor of more flexible options and third-party locations.

Home to a variety of coworking spaces and the world's biggest startup campus, Paris Region real estate offers an ecosystem of collaboration and true business synergy.



Paris Rive Gauche Immobilier © Florence Humbert

Office Space



ORIE, 2022

Over **1,500** areas for business activity

L'Institut Paris Region, 2022

34 business districts
Paris La Défense, the **4th** largest business district in the world
EY-ULI 2020

- Immediate supply: **4.1 million m²**
- Vacancy rate: **7.5%**
- Take up: **2.2 million m²**
- Space under construction: **1.7 million m²**

Immostat & Deloitte 2022, data 2022

Office rents in Paris Region

Prime rent in central Paris

- **€950/m²/year**

Prime rent in La Défense

- **€600/m²/year**

Average rent in Paris Region

- **€430/m²/year**

JLL 2022, data 2022

Paris Region: Twice Cheaper Than London in Office Rent

Office Rent Space Tracker (Q3 2022) USD Market Ranking			
Rank	Country	City	Occupancy costs \$US/sq ft/year
1	China	Hong Kong, Central	259
2	USA	New York, Midtown	220
3	United Kingdom	London, West End	182
4	China	Beijing, Finance Street	167
5	USA	Silicon Valley	149
6	China	Beijing, CBD	140
7	USA	New York, Midtown South	132
8	China	Shanghai, Pudong	128
9	China	Beijing, Zhongguancun	115
10	USA	San Francisco	114
11	Singapore	Singapore	110
12	China	Hong Kong East	109
13	China	Shenzhen	108
14	USA	Miami	106
15	China	Shanghai, Puxi	106
16	United Arab Emirates	Dubai, DIFC	103
17	Japan	Tokyo, Marunouchi	103
18	USA	New York, Downtown	102
19	United Kingdom	London, City	101
20	India	Delhi, Connaught Place	99
21	India	Mumbai, SBD BKC	97
22	USA	Boston	96
23	USA	Cambridge (Massachusetts)	96
24	Swiss	Zurich	91
25	Sweden	Stockholm	88
26	USA	San Jose	87
27	Japan	Tokyo, Shibuya	87
28	Japan	Osaka	86
29	Swiss	Geneva	83
30	Nigeria	Lagos	83
31	Japan	Nagoya	82
32	France	Paris	80

Jones Lang Lasalle Global Premium Office Rent Tracker 2022, data Q3 2022

Everything You Need to Scale Up

Coworking spaces, business centers, shared offices - in recent years the number of places where people can work remotely has steadily grown in Paris Region (+40% between 2017 and 2021), because they respond to several underlying trends: nomadism of self-employed workers, limitation of commuting, need for convivial places, conducive to exchanges and creativity, economic optimization of real estate costs of large groups, socialization of the growing population of micro-entrepreneurs...

1,023

"third places", providing flexibility to the workforce, comprising:

- 401 coworking spaces
- 256 shared offices
- 126 fablabs
- 240 business creation or development support sites

L'Institut Paris Region, 2022

The World's Biggest Start-up Campus

Based in central Paris, STATION F gathers a whole entrepreneurial ecosystem under one roof.

- 51,000 m² campus
- 1,000+ start-ups
- 30+ international startup programs
- 5,000+ start-ups supported since its creation
- Coliving space: 100 apartments, 600 rooms

Station F, 2022

The Grand Paris Express: A Great Opportunity for Urban Projects (2022)

To enhance its attractiveness and competitiveness in our globalized world, Paris Region is undertaking major infrastructure and urban planning projects. This includes the Grand Paris project, the largest urban project in Europe, which will provide a new transport network, new residential projects, office districts, and R&D hubs open to international competitions to reinvent Paris Region.

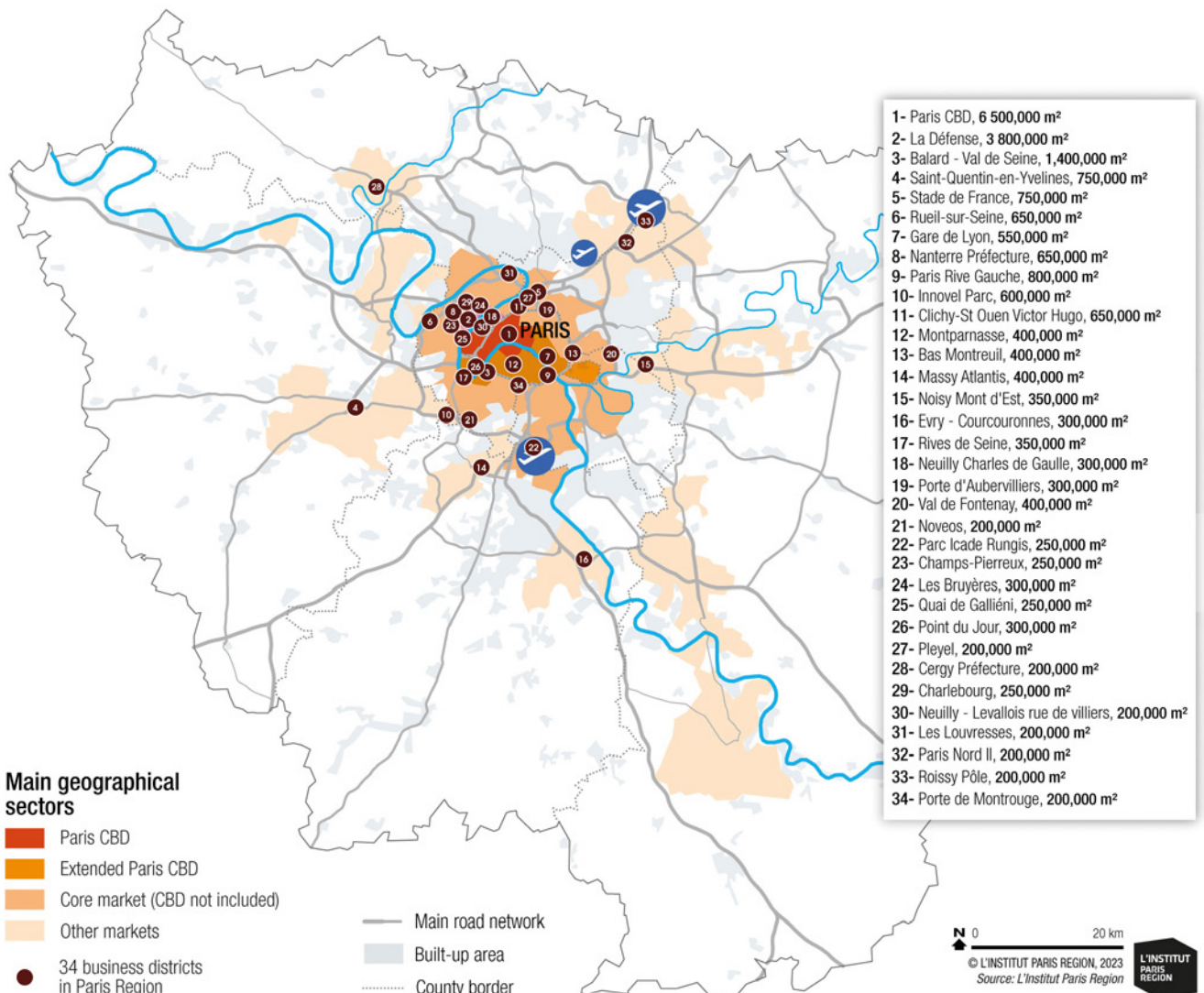
The Grand Paris Express is paving the way for a substantial increase in additional housing in Paris Region, with the creation of **250,000** to **400,000** housing units.

The Grand Paris Express is accelerating the urban renewal process in **140 km²** of neighborhoods within an 800-meter radius of each station on the rail line and represents a total development potential of **32 million m²**.

More than **100** projects will be developed by 2030 by Société du Grand Paris on land acquired for the construction of the Grand Paris Express, for a total floor area of **1 million m²**:

- 8,000 diversified housing units (almost 60% of the development is housing)
- 43,000 m² of retail and services in addition to the 20,000 m² inside the stations
- 380,000 m² of offices, logistics, and industrial real estate
- 70% of the projects will be made of bio-sourced materials of which 50% wood

The Paris Region Office Market



A Major Growing Mobility Hub

Located at the crossroads of Europe, companies based in Paris Region can easily access a market of 500+ million customers and all major European cities. The Region has a highly developed, modern, and safe transport network relying on a fast metro system, suburban trains, 7 high-speed train stations, and 3 international airports that make it easy to get around and reach other destinations in France, Europe, and the world. As the Region prepares to host the 2024 Olympic Games, several major public infrastructure projects are underway and will be constructed by 2030, including the Grand Paris Express.



The Paris metro - VanderWolf Images © Adobestock

A Gateway to Europe and the World

By plane

Paris Aéroport, UAF, 2022

- **3** international airports
- **598,640** aircraft movements
- **119** countries and **328** destinations reachable from Paris

86.7M
passengers

By train

SNCF 2021, Ile-de-France Mobilités, Eurostar, Transilien, 2022

10
main stations including

7
TGV high-speed train stations

Paris-Charles de Gaulle (CDG)

- **Leading** European airport for passengers carried*
- **4th** European hub for global connectivity
- **57.5** million passengers
- **402,849** aircraft movements
- **328** destinations

Paris-Orly

- **29.2 million** passengers
- **195,791** aircraft movements
- **128** destinations

Paris-Le Bourget

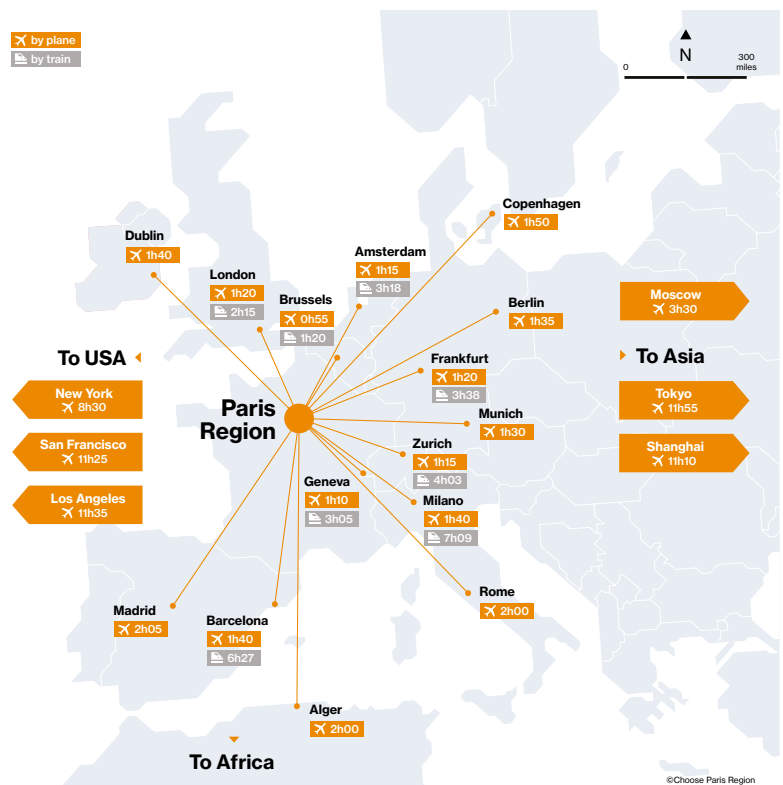
Europe's leading business airport

- **51,834** aircraft movements
- **800** destinations
- **10** airfields and **1** heliport

*Eurostat, 2022, data 2020-2021

- **3.4 million** passengers in Paris Region (**70%** of French Traffic)
- **6,000** trains per day
- **390** stations
- Over **200** stations will be made accessible by 2024
- **2nd** busiest railway network in the world after Tokyo
- **5** railway stations have traffic that exceeds **100,000** travelers daily
- Paris Gare du Nord, Europe's largest train station: **126.6 million** passengers in 2021
- Paris Saint-Lazare: **91.5 million** passengers
- Paris Gare de Lyon: **80 million** passengers
- Juvisy-sur-Orge (Ouigo trains): **41.8 million** passengers
- Paris Montparnasse: **41 million** passengers

Paris Region, Connected to Europe and the World



The Paris Region air hub is the largest in continental Europe: most major European cities are reachable in less than two hours by air.

Thanks to the TGV, rail links are efficient and direct, particularly with Belgium, the Netherlands, Germany, and Luxembourg. Paris Region's geographical location combined with quality transportation infrastructure make it a hub for easy access to other markets, notably Africa and the Middle East.

2hrs16 between Paris Nord and London with Eurostar. Up to **15** trains a day. **7** days a week.

Eurostar 2022

Paris Region through Choose Paris Region, Groupe ADP and RATP Group inaugurated the test centre dedicated to new sustainable urban air mobility (eVTOLs (electric Vertical Take-Off and Landing aircraft) at the Pontoise - Cormeilles-en-Vexin airfield.

ADP, 2022

A Dense and Unique Regional Transport Network

Public transport, bicycles, electric and traditional scooters, self-service vehicles, autonomous cars, buses and automated metros: the local transportation system offers a diverse array of constantly expanding options.

Type of trips	Number of trips / weekday (in million)	Evolution in 2018 (Oct. 2020) (in %)
Walking	16.2	- 4
Car	12.0	- 19
Public transport	6.8	- 28
Bike	1.0	+ 25
Motorized two-wheeled vehicles	0.6	+ 40
Others	0.2	- 11
Total	37	- 13

Ile-de-France Mobilités (09-10/2020)

3.3 billion trips by public transport in Paris Region		
Mode of traffic	Lines	Trips (in millions)
Subway	16	1,015
Train – RER*	13	942
Streetcars	11	266
Bus/night buses	1,529	1,086
Total	1,569	3,309

Ile-de-France Mobilités d'après Optile, RATP, SNCF, 2022, data 2021
*High-speed metro

A Wide Public Transportation Network, Extended Further by the Grand Paris Express

This largest urban development project in Europe is providing a new transport network. The project involves heavy investments in modernizing and expanding the public transport network.

- **200 km** of additional automated metro lines
- **68** new stations
- **2 to 3 million** passengers everyday
- **€36.1 Bn** invested through 2030
The project is set to link Paris Region's **3** airports as well as business districts and scientific clusters.
- In total, approximately **1 million m²** of floor space will be developed by Société du Grand Paris on the land acquired for the construction of the Grand Paris Express.

Mass Transit in Paris Region

A competitive monthly public transport subscription, at **€84.10** in 2023

Ile-de-France Mobilités, 2023

The rail system in Paris Region carries over **2 billion** passengers annually.

- Paris Region's mass transit network, **#3** in the world behind Tokyo and Seoul, and ahead of Shanghai, London, and New York.
- **3,300 km** of lines
- **454** Train, RER stations
- **304** Subway stations
- **230** Tram stations
- **1 metro every 85 seconds** on line 14
- **1 train every 2 minutes** on the RER A during rush hour
- The **30 billion kilometers** traveled annually by Paris Region's inhabitants thanks to the mass transit network, represent a **CO2 emission saving of 4 million tons per year**.
- Almost **5,000** zero-emission buses in dense areas by 2025 and in the rest of the Region by 2029
- More than **1,100** new electric trains and RER will be running on the network by 2030

Ile-de-France Mobilités d'après Optile, RATP, SNCF, 2022, data 2021

Active Mobility, Bicycles and Electromobility

Walking remains the primary mode of travel for Paris Region's inhabitants followed by car and public transport.

Other modes of innovative and eco-friendly transport, such as bicycles and similar two-wheeled vehicles, are also a growing option.

Velib Metropole, Self-Service Bicycle System

- **15,000** bikes: **60%** traditional bicycles **40%** electric power-assisted bicycles
- **1,421** stations in **58** municipalities
- **623,000** users
- **358,240** subscribers

Véligo Location, a Long-Term Rental Service (6 to 9 months) of Electrically Assisted Bikes

- **15,000** Véligo Location bikes
- **500** Electrically Assisted Cargo Bikes

Free-Floating Bike Scooter and Moped Operators

- E-bikes: **12,500** in Paris and **550** in the suburbs
- E-Mopeds: around **8,600** in Paris and near suburbs
- E-Scooters: **15,000** in Paris and **6,000** outside Paris
- **1,750** electric cars

Carsharing services in a loop

- Carsharing: **1,130** cars

L'institut Paris Region, Ile-de-France Mobilités, Velib Metropole, Veligo

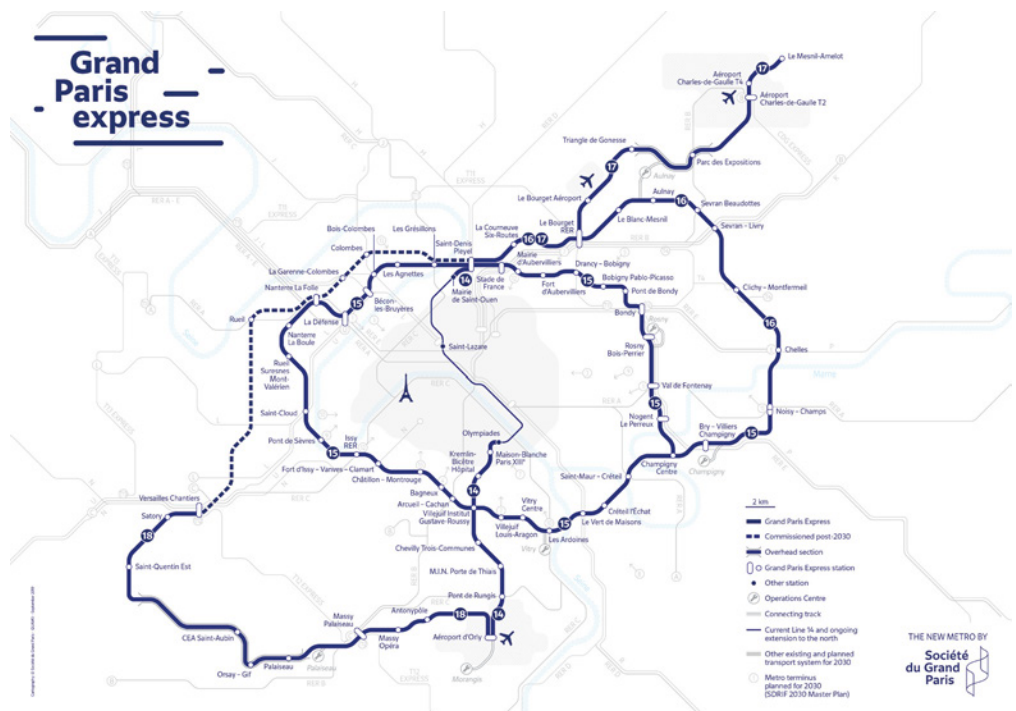
Carpooling

- **900,000** people carpool to work every day
- **272,746** tons of CO2 avoided thanks to carpooling

Ile-de-France Mobilités, 2022

The Grand Paris Express

With the Grand Paris Express and the 200 kilometers of new lines being built, new areas will emerge with good transport connectivity and with more affordable land and real estate prices.



Cost-Effective Logistics

Located at the junction of two of the major European freight corridors, Paris Region is an ideal hub for logistics and shipping. With 12.2 million inhabitants and a catchment area of an estimated 25 million inhabitants within a 200-kilometer radius, Paris Region is the leading importing (27% of imports) and exporting (21% of exports) Region in France.

90% of goods are transported by road, 6% by river, and 4% by rail. More than 7 million people in the Paris Region buy online and 84% of these purchases generate physical deliveries. E-commerce, accounting for 20% of urban flows, is growing by 15% each year. The logistics industry is searching for numerous solutions from faster delivery times to warehouses close to end-users, and other innovations, are very attractive to key logistics players.

Significant Capacity in Logistics and Real Estate

- Warehouses > 5,000 m²
- Surface area: 19 million m²
 - Available: 814,000 m²
 - Take-up: 940,000 m²

Région Ile-de-France, 2022, BNP Paribas Real Estate, 2022, data Q3/2022

Paris Region at Very Competitive Logistics Costs

Prime Rents in Q4 2021, €/m ² /year Warehouses over 5,000 m ²	
London (United Kingdom)	197
Oslo (Norway)	135
Helsinki (Finland)	120
Dublin (United Kingdom)	113
Birmingham (United Kingdom)	102
Manchester (United Kingdom)	98
Stockholm (Sweden)	91
Copenhagen (Denmark)	91
Berlin (Germany)	90
Munich (Germany)	90
Barcelona (Spain)	87
Vienna (Austria)	86
Frankfurt (Germany)	85
Hamburg (Germany)	79
Madrid (Spain)	75
Budapest (Hungary)	69
Prague (Czech Republic)	69
Paris (France)	60
Bruxelles (Belgium)	58
Milan (Italy)	57

European Logistics Market, Q4 2021, BNP Paribas Real Estate, 03/2022



Logistics on the Seine River in Limay (Yvelines) © Adobestock

Air, Road, Waterway and Railway Logistics

Paris Region generates around 230 million tons of goods each year. Road transport accounts for the vast majority of goods transported, i.e. 90% of the tonnage, river transport 6%, and rail transport 4%. The flows that concern Paris Region is both national and international. Consumer goods, which are largely imported by container, arrive in Paris Region along two major corridors, one of which is exclusively road-based and is structured by the port of Antwerp, and the other, which is already multimodal, is structured by the port of Le Havre.

Paris CDG Airport

Europe's
#2
for Cargo

Eurostat, 2022, data 2020-2021

Air

- 2.1 million tons of freight and mail handled
- 3.9 million tons of cargo capacity (both airports)
- 79 aircraft parking points dedicated to cargo at Paris-CDG
- 328 cities served worldwide European capitals and major cities within a 2-hour flight
- About 90% of total volume of air freight is handled at Paris-CDG and Orly airports

Aéroports de Paris, DGAC, data 2021

Road network

- 12,000 km of roads, including 497 km of national roads and 620 km of highways
- Freight 178 million metric tons of goods

SDES 2019, Eurostat, 2019

#1

French river port

#2

Europe's river port

Waterway

- 70 urban ports, including
- 6 multimodal platforms
- 500 km of navigable waterways
- 1,000 ha of port areas
- 6 container terminals
- Waterway: 22.5 million metric tons of goods
- 152,500 TEUs were handled
- 1 million m² of warehouse space

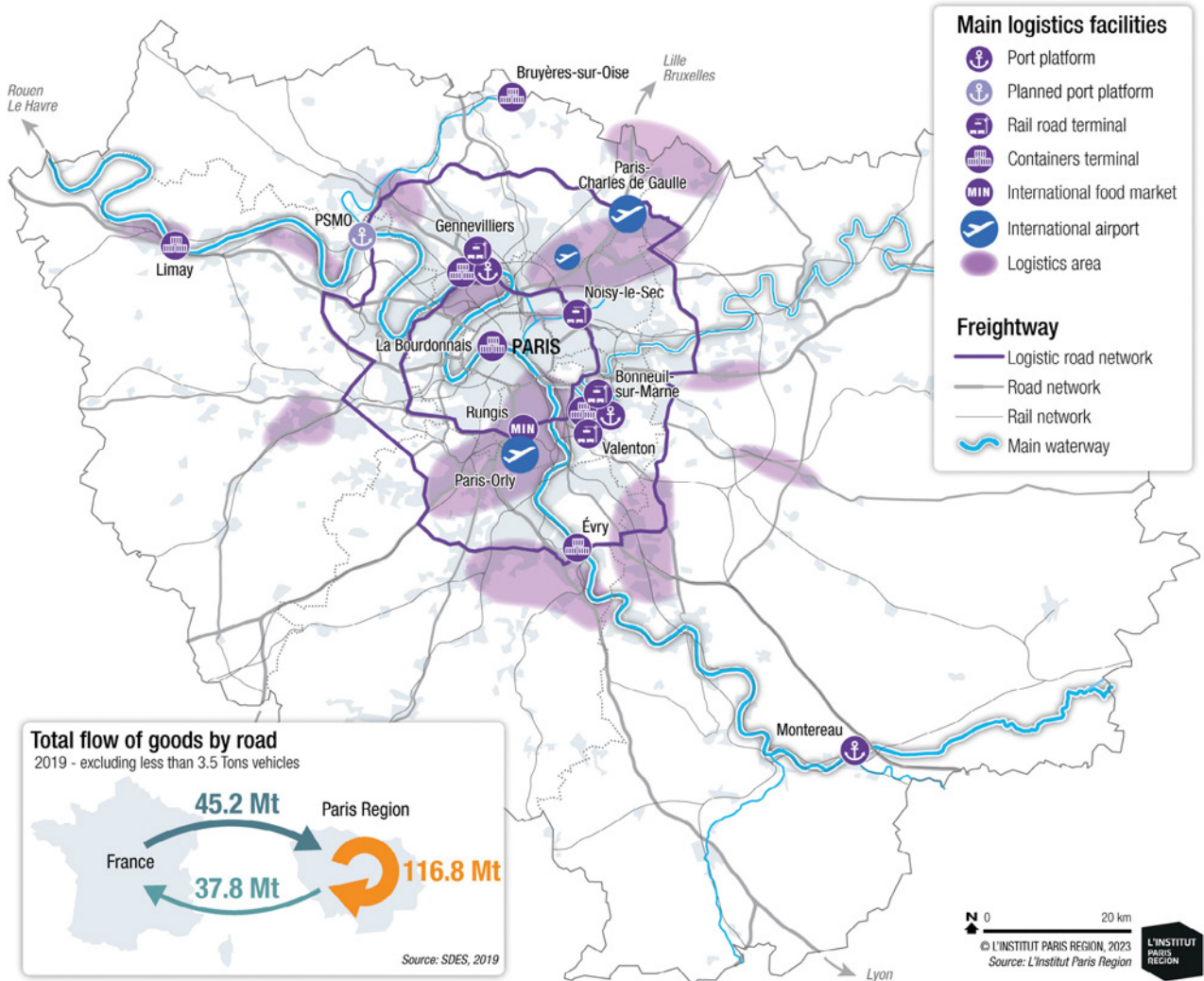
Haropa, 2022, data 2021

Rail freight

- 10 million metric tons of goods by rail, including 1.8 million through Paris Region ports
- 4 rail/road terminals
- Valenton #1 Rail/Road terminal in France
- Railway activity Materials: 4.9 million metric tons

Setra, Haropa 2021, Unicem, 2019

Logistics in Paris Region
(2023)



Facilitating the transportation of goods

The main multimodal supply chain system has been created to facilitate the transportation of goods. One of these is the HAROPA port, which is a maritime gateway to Paris Region. Thanks to its multimodal approach, the port supports innovation for sustainable logistics. More than 20 million tons of goods are handled each year, avoiding the circulation of more than one million trucks on the roads.

Flow of Goods Through Main Ports in Paris Region			
	Waterway (thousand tons of goods)	Containers (TEUs*)	Railway (thousand tons of goods)
Gennevilliers	3,470	107,755	814
Limay	1,084	3,633	421
Bonneuil-sur-Marne	1,358	19,136	635
Bruyères-sur-Oise	575	350	0
Evry	309	0	0
Précy-sur-Marne	49	4,178	not connected to rail
Paris-La Bourdonnais	95	17,529	not connected to rail

* Twenty-Foot Equivalent Units - Haropa-Port de Paris, 2022 data 2021

One of the Most Fiber-Connected Regions in Europe

Paris Region's economy relies on its strong digital ecosystem to cater to the needs of many industries. The Region is the connection point for all existing Internet networks in France. The Fiber-to-Home Infrastructure currently covers almost 100% of the Region, making the system available to everyone regardless of whether they live in a dense urban environment or rural area.

The Region has a dense data center and telecom infrastructure and offers very competitive energy costs.



© DATA4 FRANCE, Marcoussis (Essonne, 91)

A Smart and Connected Region

Launched in February 2013, the High-Speed Broadband France Plan aims to cover the entire country by 2022 by proposing high-speed internet access to all houses, businesses and government departments.

Paris Region aims to be the first Region in Europe to be entirely equipped with fiber-optic cables by 2025.

Reliable Telecommunications and Networks

4G Mobile Telephony

- 4 operators (Orange, Bouygues Telecom, SFR, and Free)
- 99.8% of the population is covered
- 100% coverage in the Paris metro (tunnels and stations)

5G Mobile Telephony

- The 4 operators have deployed their networks in the metropolitan area.
- Nearly 90% of the sites equipped with 5G offer very high speed mobile broadband (theoretical speed 240 Mbit/s).

ARCEP, 15/12/2022

Most affordable mobile and fixed Internet packages in Europe

In France, strong competition in telecoms allows consumers to benefit from some of the lowest prices in Europe, according to the Belgian telecoms regulator IBPT. French and British operators have the cheapest cell phone offers. France offers by far the most attractive prices on fixed internet. The range of prices of the offers (which go from the Internet connection only, to those including television, fixed telephony, and mobile) goes from 20 euros to a little more than 40 euros. For an offer including very high-speed Internet (at 100Mbps), television, and unlimited fixed telephony:

- France: <30 €
- UK: 40 €
- Germany: >45€
- Luxembourg: >50€
- Belgium: 70 €

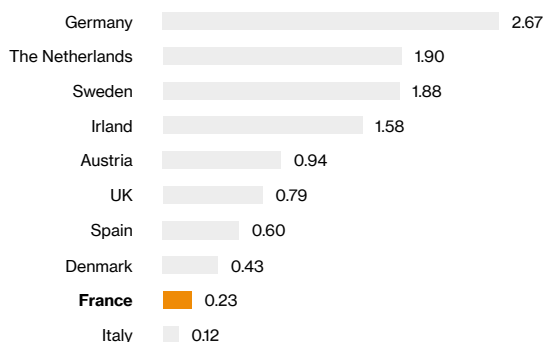
IBPT, 2022, data 2021

Cutting-edge infrastructure

Paris Region is home to a high density of technology companies and internationally renowned competitiveness clusters, which benefit from cutting-edge digital infrastructures (very high speed, cybersecurity, cloud, etc.) and from competitive energy costs.

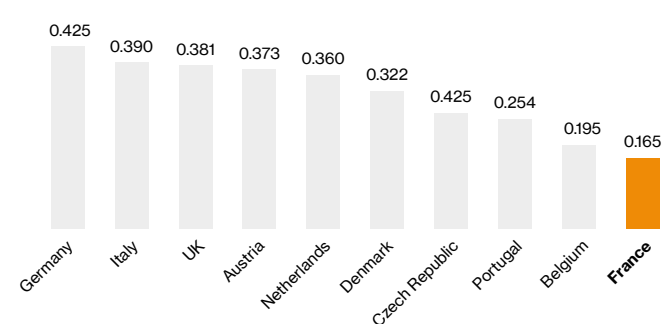
France offers very competitive Telecom and Energy Costs

Average Cost of a Gigabyte of Mobile Data on a Package Basis in 2022 (in US dollars)



Cable.co.uk (via Statista), 2022, Selection of Countries in Western Europe

Electricity Prices for Business, kWh, Euro



Global Petrol Prices, 02/2023, Prices 06/2022, Selection of Countries