Welcome to the European Metropolitan Region of Nuremberg
The Nuremberg Metropolitan Region –
Strengths and Development Perspectives

- IHK
  - Metropolitan region
  - Success factors
    - Development model
    - Infrastructure
    - International
    - Structural change
    - Innovation
    - Competence networks

Relevance & tasks of the Chamber of Commerce and Industry (IHK)
IHK Stands For ...

- Independent self-management of the industry  
  (public corporation)
- Promotion of the industrial sector
- Representation of overall economic interests  
  (well-balanced, not interests of individual sectors or enterprises)
- Political neutrality
- Services for members, the region and the state
IHK – The Number One Address

<table>
<thead>
<tr>
<th>Members</th>
<th>Region</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Representation of interests incl.</strong></td>
<td><strong>Location development incl.</strong></td>
<td><strong>Sovereign tasks incl.</strong></td>
</tr>
<tr>
<td>• Business-friendly climate</td>
<td>• Situation maintenance</td>
<td>• Vocational training</td>
</tr>
<tr>
<td>• General conditions</td>
<td>• Infrastructure</td>
<td>• Examinations</td>
</tr>
<tr>
<td></td>
<td>• Innovation, R&amp;D</td>
<td>• Certificates of origin</td>
</tr>
<tr>
<td></td>
<td>• Internationalization</td>
<td>• Experts</td>
</tr>
<tr>
<td></td>
<td>• Regional marketing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Service incl.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Business start-ups</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Professional training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Company info</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Trade &amp; business law consultancy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Environment and energy consultancy</td>
</tr>
</tbody>
</table>
Examples in "Day-to-Day Business"

**Location Policy and Business Promotion**

**Sovereign tasks:** examinations, expert opinions, documents, ...
- 21,000 cases of supervision of apprenticeships
- 23,000 intermediate and final examinations, other examinations
- 16,000 appointments, opinions (Com. Reg., start-ups, foreign nationals), ...
- 65,000 foreign trade documents

**Service:** Consultancy and information
- 75,000 cases of providing information and brief consultancy
  (company research, legal consultancy, customs information, ...)
- 16,000 cases of in-depth consultancy
  (start-ups, financing, export, trade fairs, environment, energy, innovation, e-business, ...)

**Communication and networks:**
- 5500 volunteers in committees, IHK bodies, working parties, ...
- 500,000 visitors accessing IHK web sites
- 95,000 copies per month of IHK magazine WiM
- 350 press conferences, press releases, press inquiries
- 60 technology-oriented networks and IHK e-forums
IHK Nuremberg for Central Franconia in Figures

125,000 member companies

200 employees

14 regional CCI boards

7 business segments:
- Location Policy and Business Promotion
- Vocational and Professional Training
- Innovation and Environment
- International Affairs
- International
- Legal Matters and Taxes
- Communication
- Key Tasks

5500 entrepreneurs and senior management with over 120,000 hours per year working on a voluntary basis for the IHK (plenum, committees, IHK bodies, examiners)
The Nuremberg Metropolitan Region – Strengths and Development Perspectives

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The Nuremberg Metropolitan Region within the European Network

- Eleven European Metropolitan Regions in Germany
- EU classification of the EMRN as "Gateway to Eastern Europe"
- EMRN one of the strongest economic regions in Germany and Europe
Facts and Figures
Nuremberg Metropolitan Region

Key facts & figures for the Nuremberg Metropolitan Region:
- Population .................. 3.5 million
- Companies ................. 150,000 plus
  > 50,000 other self-employed
- Working population ...... 1.7 million
- Gross domestic product ... 100 billion EURO
- Export quota ................ > 45 %
- Service quota ................ > 60 %
- Reach ......................... 27 million people
  (200 km radius around Nuremberg)
Welcome to the European Metropolitan Region of Nuremberg

International Comparison of Economic Performance

Gross domestic product 2006 in European states and the Nuremberg economic region

Source: EUROSTAT

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP (billion EURO)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malta</td>
<td>5.1</td>
</tr>
<tr>
<td>Estonia</td>
<td>13.2</td>
</tr>
<tr>
<td>Cyprus</td>
<td>14.7</td>
</tr>
<tr>
<td>Latvia</td>
<td>16</td>
</tr>
<tr>
<td>Lithuania</td>
<td>23.7</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>25.5</td>
</tr>
<tr>
<td>Slovenia</td>
<td>30</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>33.9</td>
</tr>
<tr>
<td>Croatia</td>
<td>44.6</td>
</tr>
<tr>
<td>Slovak Republic</td>
<td></td>
</tr>
<tr>
<td>CENTRAL FRANCONIA</td>
<td>55</td>
</tr>
<tr>
<td>Hungary</td>
<td>90</td>
</tr>
<tr>
<td>Romania</td>
<td>97.7</td>
</tr>
<tr>
<td>NUREMBERG</td>
<td>105</td>
</tr>
<tr>
<td>METROPOLITAN REGION</td>
<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td>113.4</td>
</tr>
<tr>
<td>Portugal</td>
<td>155.4</td>
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<tr>
<td>Finland</td>
<td>167</td>
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<tr>
<td>Ireland</td>
<td>214</td>
</tr>
<tr>
<td>Greece</td>
<td>220</td>
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<tr>
<td>Denmark</td>
<td>257</td>
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<tr>
<td>Austria</td>
<td>310</td>
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<td>Poland</td>
<td>313</td>
</tr>
<tr>
<td>Switzerland</td>
<td>317</td>
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<tr>
<td>Sweden</td>
<td></td>
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<tr>
<td>Belgium</td>
<td></td>
</tr>
</tbody>
</table>

Source: EUROSTAT
IHK Metropolitan Region Benchmark 2006
Economic Power and Development Momentum

<table>
<thead>
<tr>
<th>Metropolitan Region</th>
<th>Ranking</th>
<th>Ranking Split</th>
</tr>
</thead>
<tbody>
<tr>
<td>Munich</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Rhine-Main/Frankfurt</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Stuttgart</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Rhine-Ruhr</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Hamburg</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>NUREMBERG</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Rhine-Neckar/Mannheim</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Bremen-Oldenburg</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Saxony Triangle</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Hanover-Brunswick-Götingen</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Berlin-Brandenburg</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

Ranked according to benchmark points for the criteria:
- **Economic power**
- **Development momentum**

Data sources:
Federal Office for Building and Regional Planning (BBR), Federal Office of Statistics
Innovation and Business Start-Up Region

Business start-up intensity in the industrial high-tech sector in the eleven German Metropolitan Regions

<table>
<thead>
<tr>
<th>Metropolitan Region</th>
<th>Ranking 2004/06</th>
<th>Change in ranking in 10-year comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Munich</td>
<td>1</td>
<td>±0</td>
</tr>
<tr>
<td>NUREMBERG</td>
<td>2</td>
<td>+5</td>
</tr>
<tr>
<td>Hamburg</td>
<td>3</td>
<td>+5</td>
</tr>
<tr>
<td>Stuttgart</td>
<td>4</td>
<td>-2</td>
</tr>
<tr>
<td>Rhine-Neckar</td>
<td>5</td>
<td>-1</td>
</tr>
<tr>
<td>Rhine-Main</td>
<td>6</td>
<td>-3</td>
</tr>
<tr>
<td>Rhine-Ruhr</td>
<td>7</td>
<td>-3</td>
</tr>
<tr>
<td>Hanover</td>
<td>8</td>
<td>+3</td>
</tr>
<tr>
<td>Saxony Triangle</td>
<td>9</td>
<td>-1</td>
</tr>
<tr>
<td>Berlin-Brandenburg</td>
<td>10</td>
<td>-1</td>
</tr>
<tr>
<td>Bremen-Oldenburg</td>
<td>11</td>
<td>-1</td>
</tr>
</tbody>
</table>

Source: Centre for European Economic Research (ZEW) Business Start-up Panel 2008
High-Tech Region

Percentage of people employed in high-tech sector

- Dresden 1: 8.7%
- Munich 2: 8.5%
- NUREMBERG/ERLANGEN 3: 7.6%
- Karlsruhe 4: 7.6%
- Berlin 5: 7.0%
- Hamburg 6: 6.9%
- Frankfurt a.M. 7: 6.5%
- Cologne/Bonn 8: 6.3%
- Leipzig 9: 6.2%
- Freiburg 10: 6.0%

Source: EUROSTAT, according to BITKOM (2008)
Welcome to the European Metropolitan Region of Nuremberg

Organization

Council Chairman
1st Deputy
2nd Deputy
Branch Office

Steering Committee

Political Speaker
Expert Speaker
GF

Council

Urban districts
Rural districts
Most heavily populated municipalities

Co-opted: Representatives of the Bavarian state government, District President, Regional Council President

Steering Committee

Political Speaker
Expert Speaker
GF

Forums

Business and Infrastructure Forum
Science Forum
Transport and Planning Forum
Culture and Sport Forum
Tourism Forum
Marketing Service Forum

Regional Conference

Branch Office – Location Policy and Business Promotion

Contact:
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Rathausplatz 2
90403 Nürnberg

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Telephone: (0911) 231-79 73 oder -79 74
Fax: (0911) 231-79 72
metropolregion@stadt.nuernberg.de
Team Approach: Cooperation Agreement between the IHKs in the Nuremberg Metropolitan Region

Joint Declaration of Intent by the IHKs in the Nuremberg Metropolitan Region concerning cooperation between the IHKs in particular in the fields of:

- Joint development model for the Nuremberg Metropolitan Region
- Transport
- Business start-ups
- Technology
- Vocational and professional training
- International affairs
- Social responsibility
The Nuremberg Metropolitan Region – Strengths and Development Perspectives

- IHK
- Metropolitan region

**Success factors**
- Development model
- Infrastructure
- International
- Structural change
- Innovation
- Competence networks

Success factors for the Nuremberg Economic Region
Strategic structure of WaBe Model

- Overall strategy of metropolitan region
- Long-term economic and scientific perspectives for the region
- Mid-term structural goals and/or area-specific development concepts
- New/ongoing projects for attainment of goals
- Sustainability

TOP International Address
Home for creative minds

EMN strategic model

Vision – Core themes – Key projects
Fields of competence – Drivers of innovation
E.g. infrastructure
E.g. technology

Regional concepts

Action programmes

Realisation; verification of success
Significance of the Development Model for the Region

- Joint concept of all regional stakeholders → Consensus region
- Subject-oriented fields of competence → Cluster policy
- Bavarian high-tech offensive → 388 million EURO project support
- Six competence initiatives → Successful network-building
- IZMP (Erlangen), etz (Nuremberg), Technikum (Fürth) → Investments totalling millions
- Development model leads the way Germany-wide → Best practice

Basis for Metropolitan Region
Welcome to the European Metropolitan Region of Nuremberg

Strategic Orientation: Nuremberg Economic Region Development Model

- Core technological competencies
- Cross-sectoral competence
- Cross-sectoral technologies
Regional Development Model and Bavarian Cluster Policy

### Fields of competence

<table>
<thead>
<tr>
<th>Transport &amp; Logistics</th>
<th>Automotive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Railway technology</td>
<td>Logistics</td>
</tr>
<tr>
<td>Propulsion technologies</td>
<td>Telematics</td>
</tr>
<tr>
<td>Information &amp; Communication</td>
<td></td>
</tr>
<tr>
<td>Medicine &amp; Health</td>
<td></td>
</tr>
<tr>
<td>Energy &amp; Environment</td>
<td></td>
</tr>
<tr>
<td>New Materials</td>
<td></td>
</tr>
<tr>
<td>Automation &amp; Production Engineering</td>
<td></td>
</tr>
<tr>
<td>Innovative Services</td>
<td></td>
</tr>
<tr>
<td>Nanotechnology</td>
<td></td>
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<tr>
<td>Biotechnology</td>
<td></td>
</tr>
<tr>
<td>Power Electronics</td>
<td></td>
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<tr>
<td>Mechatronics</td>
<td></td>
</tr>
<tr>
<td>Optics, Laser, Photonics</td>
<td></td>
</tr>
</tbody>
</table>

### Cross-sectoral technologies

<table>
<thead>
<tr>
<th>Automotive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Railway Technology</td>
</tr>
<tr>
<td>Logistics</td>
</tr>
<tr>
<td>Aerospace</td>
</tr>
<tr>
<td>IT</td>
</tr>
<tr>
<td>Media</td>
</tr>
<tr>
<td>Satellite Navigation</td>
</tr>
<tr>
<td>Medical Technology</td>
</tr>
<tr>
<td>Energy</td>
</tr>
<tr>
<td>Environmental Technology</td>
</tr>
<tr>
<td>New Materials</td>
</tr>
<tr>
<td>Chemical Industry</td>
</tr>
<tr>
<td>Mechatronics &amp; Automation</td>
</tr>
<tr>
<td>Financial Services</td>
</tr>
<tr>
<td>Nanotechnology</td>
</tr>
<tr>
<td>Biotechnology</td>
</tr>
<tr>
<td>Power Electronics</td>
</tr>
<tr>
<td>Food Production</td>
</tr>
<tr>
<td>Forests &amp; Wood</td>
</tr>
</tbody>
</table>

Central role of field of competence and cross-sectoral technology of the regional development model

Cluster Relevant contribution of single enterprises or institutions
Welcome to the European Metropolitan Region of Nuremberg

circa 90,000 students at
18 higher education establishments in the Nuremberg Metropolitan Region

Higher Education Establishments in the Metropolitan Region

- University of Würzburg
- Academy of Music Würzburg
- UAS Würzburg-Schweinfurt
- Hof and Sulzbach-Rosenberg UAS
- Hof University of Bayreuth
- Academy of Sacred Music Bayreuth
- UAS Amberg-Weiden
- Augustana UAS Neuendettelsau
- UAS Ansbach
- UAS Weihenstephan/Triesdorf
- Academy of Fine Arts Nuremberg
- Academy of Music Nuremberg-Augsburg
- Protestant University College Nuremberg
- University of Erlangen-Nuremberg
- UAS Coburg
- UAS for Public Administration &/Administration of Justice Hof and Sulzbach-Rosenberg
- Georg-Simon-Ohm UAS Nuremberg
- University of Erlangen-Nuremberg
- University of Bamberg
- University of Bayreuth
- Würzburg-UAS
- Würzburg-Schweinfurt University of Bamberg
- Coburg University of Würzburg
- Würzburg University of Würzburg
Welcome to the European Metropolitan Region of Nuremberg

Science Region

Fraunhofer - Zentralinstitut für Neue Materialien und Prozeßtechnik

Fraunhofer - Institut Integrierte Schaltungen

Fraunhofer - Entwicklungszentrum Röntgentechnik

Fraunhofer - Institut Integrierte Systeme und Bauelementetechnologie
Transport Connections

- Central position in Europe
- Nuremberg International Airport
- European motorway intersection
- Rail junction for international rail routes
- International waterway
- Local public transport system
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Nuremberg Port Freight Centre

- Nuremberg Port Freight Centre as central hub between North Sea and Black Sea
- Largest multifunctional logistics centre in Southern Germany (337 ha)
- Annual cargo handling volume: 11 million tons
- 260 enterprises providing 5300 jobs
- Container terminal for 125,000 units p.a.
- Port railway terminal, port customs office
Nuremberg Airport

- International airport with 4 million passengers p.a.
- 70 destinations in 21 countries
- Direct connections to the intercontinental hubs:
  - Frankfurt
  - Zürich
  - Paris
  - Munich
  - Brussels
  - Amsterdam
- Hub airport for tourist traffic
- Business Traveller Award: ranked number one each year since 2001
- Short passenger handling times and short distances
- Underground railway link:
  - 20 minutes to Trade Fair Centre
  - 12 minutes to city centre
Welcome to the European Metropolitan Region of Nuremberg

Nuremberg Trade Fair and Congress Centre

- One of Europe’s TOP-10 trade fair venues
- 152,000 m² exhibition space, 76,000 m² open-air area
- Approx. 8000 international and 14,000 national exhibitors p.a.
- Approx. 1.2 million visitors p.a.
- High degree of internationality: depending on event, up to 70% of exhibitors and more than 60% of visitors from outside Germany
- Leading international fairs: International Toy Fair, Brewery, IWA, Embedded Systems, etc.
- CongressCenter Nuremberg (CCN) Capacity for congresses ranging from 15 to 11,000 participants
Trans-European Networks and Pan-European Corridors

Intersection of three Trans-European axes
- TEN 1: Railway axis
  Berlin-Nuremberg-Rome-Palermo
- TEN 18: Inland waterway
  Rhine/Maas-Main-Danube
- TEN 22: Railway axis
  Nuremberg-Prague-Budapest-Bucharest/Istanbul

Starting point of two Pan-European corridors
- Corridor IV: Nuremberg-Prague-Bucharest
- Corridor VII: Danube
China Landbridge
中国大陆桥
Nuremberg – Beijing
纽伦堡–北京

duration: 15–18 days
distance: approx. 10,500 km

duration: 26–30 days
distance: approx. 18,000 km
Region Nuremberg Strategy International Orientation

- 2500 export trading companies with 8700 agencies and branch offices all over the world
- Export quota over 45%
- EU classification "Gateway to Eastern Europe"
- New focus "Asia-Pacific"
- Location of:
  - 12 Representative Offices
  - European Office of Shenzhen (People's Republic of China)
  - Bavarian Foreign Trade Centre
European Economic Region

Key figures for EU27

Population 493 million
thereof in new (since 2005) 25 %
EU member states

Gross domestic 11 trillion EURO
thereof in new (since 2005) 5 %
EU member states

Extra–EU27–trade 2.2 trillion EURO
volume 2005 (exports and imports)

Intra–EU trade 66 %
(share of national exports to EU partner countries)
Welcome to the European Metropolitan Region of Nuremberg

Export and Total Turnover Volume of Central Franconian Industry 1990 to 2008

<table>
<thead>
<tr>
<th>Year</th>
<th>Export quota</th>
<th>Total sales volume</th>
<th>Foreign sales volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>32.6</td>
<td>25.3</td>
<td>8.2</td>
</tr>
<tr>
<td>1992</td>
<td>31.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td>33.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1996</td>
<td>40.0</td>
<td>34.0</td>
<td>13.9</td>
</tr>
<tr>
<td>1998</td>
<td>38.6</td>
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<tr>
<td>2000</td>
<td>40.8</td>
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<td>2001</td>
<td>41.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>41.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>41.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>41.2</td>
<td></td>
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<td>2005</td>
<td>42.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>43.1</td>
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</tr>
<tr>
<td>2007</td>
<td>47.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>48.4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bavarian State Office for Statistics and Data Processing
Worldwide Presence

Foreign trade connections of Central Franconia’s 2500 companies to international trade regions

- Europe (Total): 2400
- Central/Eastern Europe: 1100
- Asia/Pacific: 1200
- North/South America: 900
- Near/Middle East: 520
- Africa: 500
Economic Structure – Broad Industry Mix

111,227 IHK member companies (1.1.06)
Company split by sectors of industry:

- Agriculture and forestry: 1.5%
- Manufacturing industry: 1.8%
- Building industry: 4.6%
- Retail trade; repairs: 20.7%
- Wholesale trade, trade agencies: 11.1%
- Hotel and restaurant industry: 7.0%
- Transport and telecommunications: 11.1%
- Banking and insurance industry: 6.0%
- Housing, real estate: 11.3%
- Services for companies: 4.9%
- Other services: 9.8%

in percentage
Gross Value Added in Central Franconia

Gross value added to manufacturing prices:

- Total
  - 1991: 33.6
  - 1995: 38.3
  - 1999: 42.6
  - 2000: 44.4
  - 2001: 46.2
  - 2002: 46.9
  - 2003: 48.5
  - 2004: 48.4
  - 2005: 49.4
  - 2006: 51.7

- Service sector
  - 1991: 20.2
  - 1995: 24.8
  - 1999: 28.3
  - 2000: 29.2
  - 2001: 30.4
  - 2002: 31.9
  - 2003: 32.5
  - 2004: 33.0
  - 2005: 33.6
  - 2006: 34.7
  - 2007: 35.3

- Manufacturing sector
  - 1991: 12.9
  - 1995: 13.1
  - 1999: 14.0
  - 2000: 14.8
  - 2001: 13.5
  - 2002: 13.8
  - 2003: 13.9
  - 2004: 15.0
  - 2005: 14.5
  - 2006: 14.3
  - 2007: 16.0

Data source: Bavarian State Office for Statistics and Data Processing
Development of Gross Value Added in Central Franconia

From industrial to service society:

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of manufacturing sector</th>
<th>Share of service sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>55.4%</td>
<td>42.6%</td>
</tr>
<tr>
<td>1990</td>
<td>58.2%</td>
<td>40.3%</td>
</tr>
<tr>
<td>2000</td>
<td>65.6%</td>
<td>33.3%</td>
</tr>
<tr>
<td>2004</td>
<td>68.8%</td>
<td>30.3%</td>
</tr>
</tbody>
</table>
National Insurance Contributors in Central Franconia

Employees subject to social insurance contributions (as at 30 June each year)

Data source:
Bavarian State Office for Statistics and Data Processing
Employment Development in Central Franconia

From industrial to service society:

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of industrial sector employees</th>
<th>Share of service sector employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1974</td>
<td>38.2%</td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>49.4%</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>36.4%</td>
<td></td>
</tr>
</tbody>
</table>
Employment Structure in Central Franconia
Growth of Skill-Intensive Services

Share of total number of persons employed in Central Franconia

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Services</th>
<th>High-Tech, Finance &amp; Management</th>
<th>Skill-Intensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>57.1</td>
<td>13.5</td>
<td>28.0</td>
</tr>
<tr>
<td>1998</td>
<td>59.9</td>
<td>15.0</td>
<td>29.3</td>
</tr>
<tr>
<td>2000</td>
<td>56.0</td>
<td>13.5</td>
<td>27.5</td>
</tr>
<tr>
<td>2002</td>
<td>63.0</td>
<td>15.0</td>
<td>31.1</td>
</tr>
<tr>
<td>2004</td>
<td>62.8</td>
<td>15.0</td>
<td>32.5</td>
</tr>
<tr>
<td>2006</td>
<td>68.1</td>
<td>15.2</td>
<td>35.7</td>
</tr>
</tbody>
</table>

Data source: EUROSTAT 2006
Companies and Brands of International Standing

adidas
SIEMENS
playmobil
INA
Alcatel-Lucent
DIEHL
STABILO
GfK
STAEDTLER
ARAL
LEONI
DATEV
uvex
Faber-Castell
BOSCH
Strategic Orientation:
Nuremberg Economic Region
Development Model

Innovative Services:
- Market research
- Call centres
- eCommerce
- Tax and management consultancy
- Financial broking
- Facility Management
Transport and Logistics

- International hub for transport and logistics
- 770 companies with 75,000 employees in Greater Nuremberg area
- Transrapid Shanghai: 30% regional value added
- Fraunhofer workgroup for technologies of the logistics service industries
- Transport initiative CNA Neuer Adler e.V. with cluster platform rail engineering

Main focus:
- Drive engineering
- Automotive
- Logistics
- Telematics
- Rail engineering
Information and Communication

- Among the TOP-10 I&C locations in Europe
- Development of mp3 standard in Central Franconia (awarded the German Research Prize by the Federal President)
- Nuremberg Initiative for the Communications Industry (NIK)
- Facts:
  - 8000 companies
  - 90,000 employees
  - 11 billion EURO sales
- Main focus:
  - Linux/open source
  - Voice recognition
  - Optical communication technology
  - Publishing/printing industry
  - Call centres
  - eCommerce/Data and IT services
Medicine and Health

- **Medical Valley with**
  - More than 70,000 employees in the health sector, including approx. 5000 in small and medium-sized companies (medical products and technologies)
  - Large companies and 150 small and medium-sized enterprises

- **Life Sciences as main point of focus in research**
  Medical technology, Bioinformatics, Infection and Inflammation Research, Immunology and Transplantation Medicine, Genetics and Genomics, Public Health

- **IZMP Innovation and Start-Up Centre Medical Technology and Pharmaceuticals**

- **Networks:**
  Competence Initiative Medicine – Pharmaceuticals – Health Region Nuremberg, Medical Valley Bayern e.V., IHK User Club Medical Technology, Breathing Centre Erlangen, National Genomic Research Network – Genomic Network "Cancer"

- **Main focus:**
  - Medical technology (in particular imaging, medical informatics, implantation technology)
  - Pharmaceuticals/Biotechnology (drug development and production processes)
  - Health (health economics, research and pedagogics, quality of life research)
Energy and Environment

- Power industry:
  - Approx. 50,000 employees in over 300 enterprises
  - Responsible for more than 50% of the industry’s total export turnover
- Extensive environmental expertise in the region:
  - 18,000 employees in 700 companies and institutes of the environmental industry
  - R&D at four ASU locations and at the Fraunhofer Institute (IISB)
  - Energy Region Nuremberg e.V.
  - Energy Technology Centre Nuremberg (etz)
  - Initiative “Environmental Competence Northern Bavaria”
- Main focus:
  - Turbine manufacturing and power station construction
  - Measuring and control technologies
  - Development and use of efficient and regenerative energy technologies
  - Waste-disposal and sewage technology
New Materials

- Cross-sectoral technology: (materials processing, process development)
  - Several ten thousand jobs in companies in all sectors
- Research establishments:
  - FAU Erlangen-Nuremberg
  - University of Applied Sciences in Nuremberg and Ansbach
  - Fraunhofer Workgroup: Nanofocus X-Ray Centre
  - Central Institution for New Materials and Process Technology (ZMP) New Materials Fürth (NMF)

- Networks:
  - Competence Initiative New Materials Nuremberg Metropolitan Region (KINEMA)
  - Competence Network Plastics Ansbach
  - Centre for Materials Analysis Lauf (ZWL)
  - IHK User Clubs (AWC) “New Materials” and “Non-destructive Testing”
- Main focus:
  - Metals, particle technology, lightweight construction, plastics, ceramics, surface treatment, materials testing, nanotechnology
  - Composite materials, material compounds
Automation and Production Technology

- Sector and cross-sectoral technologies:
  - Around 40,000 jobs in 300 companies
  - This corresponds to one third of all jobs in Bavaria and 10% of all jobs in Germany in the sector of electrical automation technology

- Research establishments:
  - FAU Erlangen-Nuremberg
  - University of Applied Sciences Nuremberg
  - Fraunhofer Institutes IIS and IISB

- Leading trade fairs:
  - SPS/IPC/DRIVES, "Embedded World", SENSOR, SMT/HYBRID/PACKAGING, PCIM

- Automation Valley Northern Bavaria:
  - Cooperation network for automation technology

- Main focus:
  - Electrical drive technology
  - Measuring and control technologies
  - Software for automation
  - Manufacturing technologies, system integration
Innovative Services

- European centre for market research
- Pilot region for eCommerce,
  Winner of the MEDIA@Komm multimedia competition
- Stronghold of the call centre industry in Bavaria
- Multi-faceted consultancy services, centre of auditing,
  tax consultancy, corporate consultancy
- Pioneer region for financial broking
- Growth region for personnel services
- Facility Management:
  - Dynamic company growth
  - DIFMA (German Institute for Facility Management)
Focus of Research Cross-Sectoral Technologies

- Mechatronics:
  - Mechatronics course of studies
  - Mechatronics at the Nuremberg Research Factory
- Power Electronics:
  - Centre for Automotive Power Electronics ZKLM
  - Engineering Centre for Power Electronics ECPE e.V.
- Optics, Laser, Photonics:
  - Max-Planck Research Group
  - POF User Centre
- Nanotechnology:
  - Nanoparticle Centre
  - Molecular Science
- Biotechnology:
  - BioMedTec Franconia
  - Bioprocess Engineering