

Welcome to Bavaria: Europe's Leading Innovation Hub.

SDI Delegation – Nuremberg 27.06.2018

Europe's Powerhouse

Bavaria – a strong economy in the heart of Europe.

- > $70,550 \text{ km}^2$ - Germany's largest federal state.
- > Population 12.98 m (6/2017) - # 11 in the EU.
- > GDP (2017) €594 bn - # 7 in the EU.
- > GDP development (2010 – 2017) 18.3% - # 1 in Germany.
- > Unemployment rate (5/2018) 2.7 % - # 1 in Germany.
- > Patent registrations – regularly # 1 in Germany.



Europe's Powerhouse

Bavaria – a strong economy in the heart of Europe

2.7%

Unemployment rate (5/2018)

18.3%

GDP growth (2010 to 2016)

€ 594 bn.

GDP (2016)



€ 192 bn

Export volume (2017)

€ 24,290

Purchasing power per capita (2017)

15,867

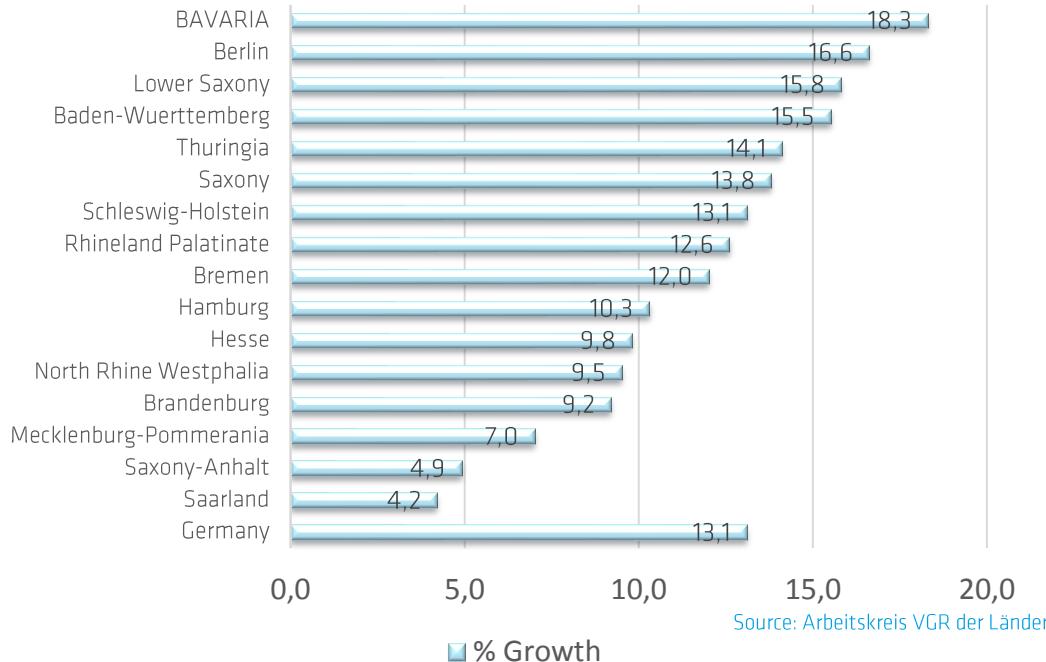
Patent applications (2016)
No. 1 in Germany

Bavaria - Germany's Powerhouse.

GDP Growth by State in Germany

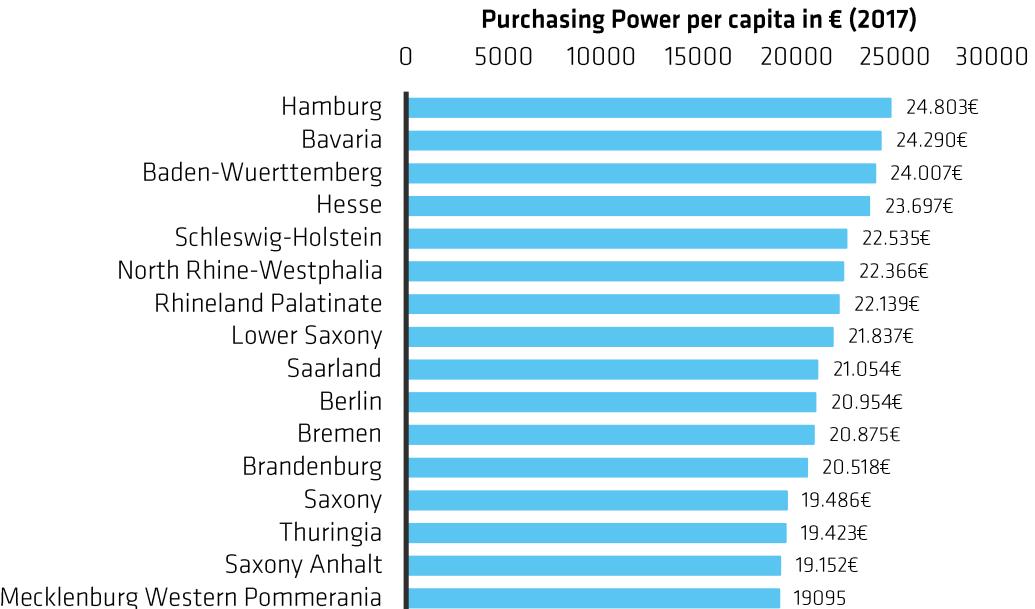
Bavaria Ahead

GDP Growth 2010 - 2017

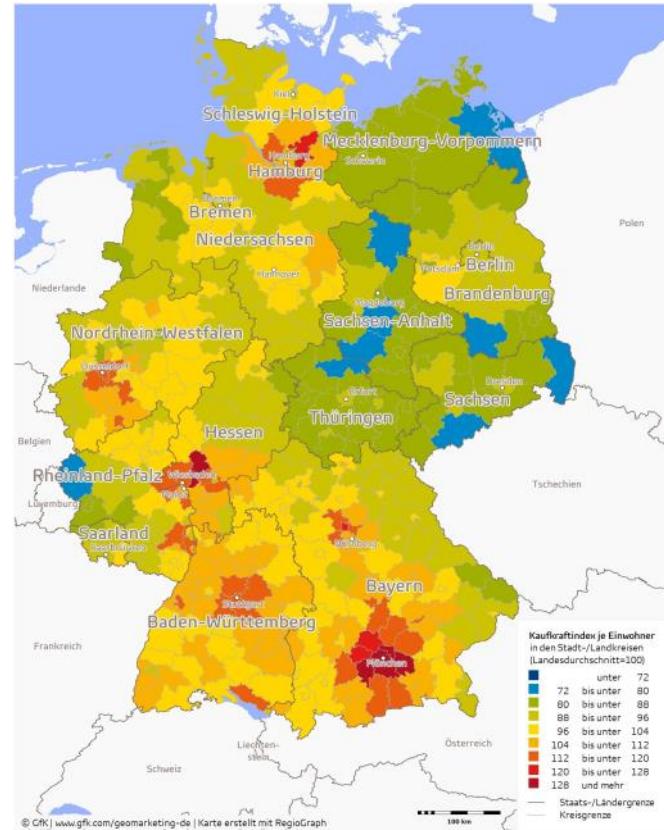


Purchasing power in Germany

Bavaria Ahead



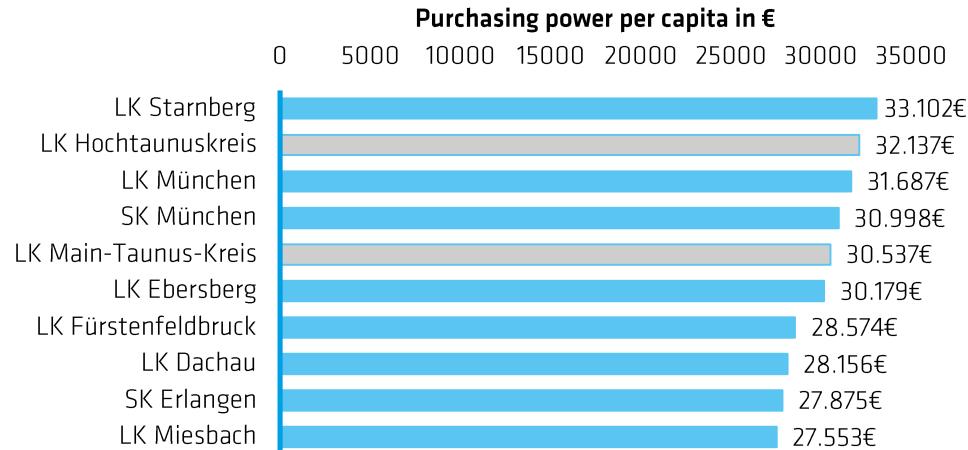
Source: GfK (GeoMarketing)



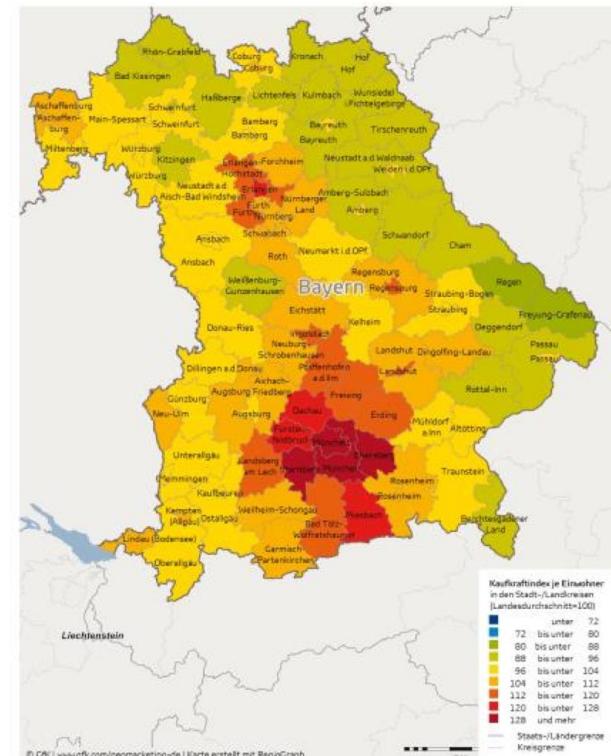
Purchasing Power in Bavaria

Munich & Nuremberg regions ahead

The top ten urban and rural districts with **the highest purchasing power** in Germany include **eight in Bavaria**



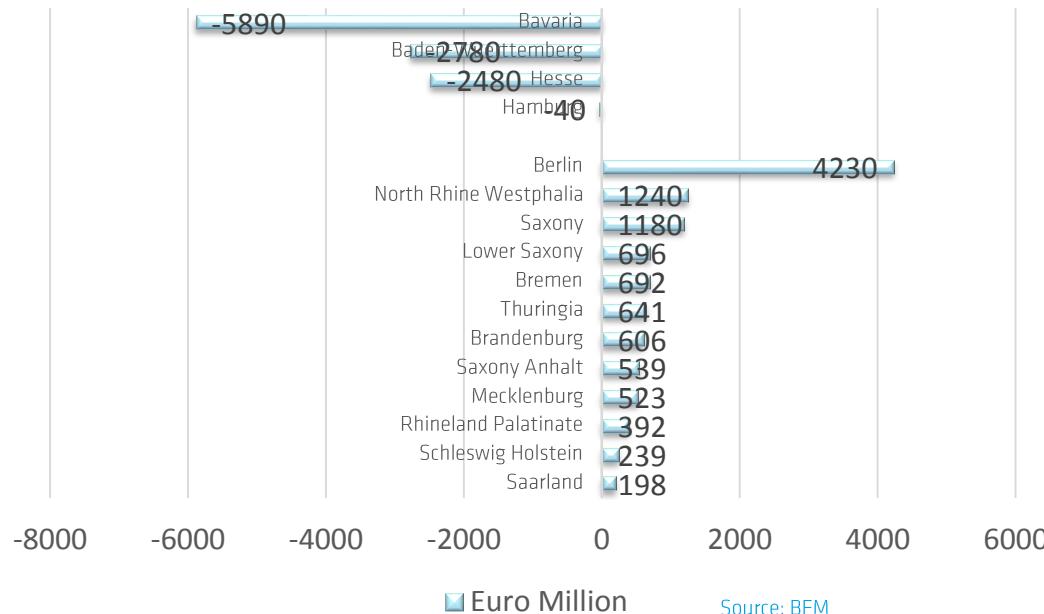
Source: GfK (GeoMarketing)



Redistribution of Tax Yields in Germany

Paymaster Bavaria

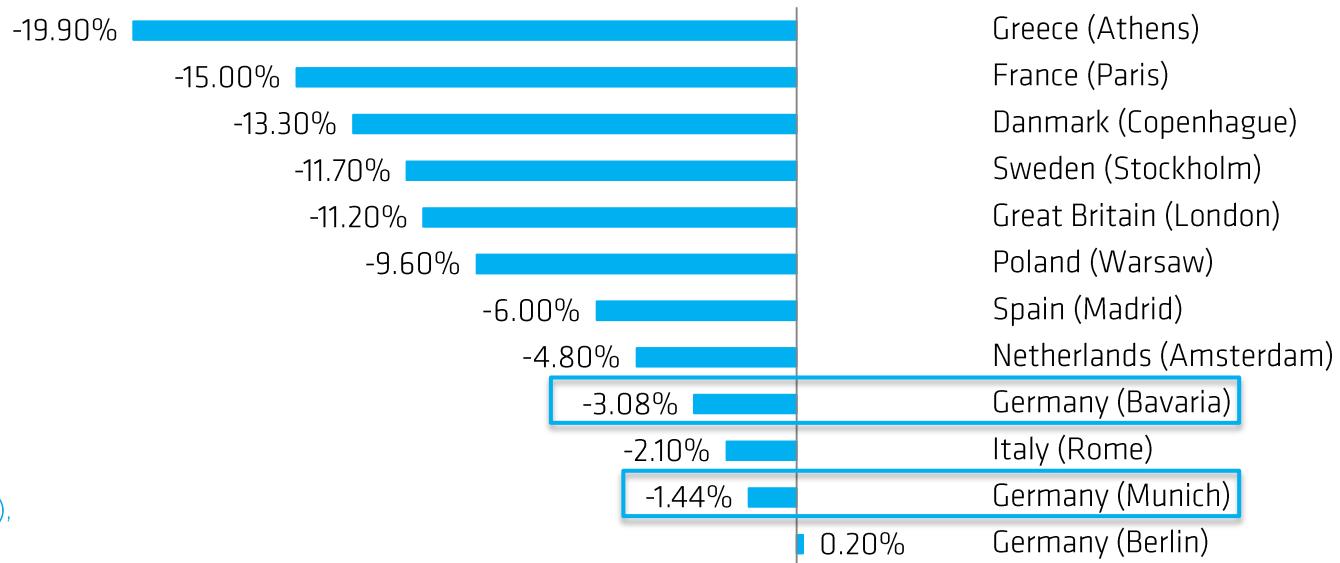
Interstate Finance Equalization 2017



Bavaria and Munich as an important economic factor for Germany

Munich is the economic capital of Germany

Difference of the GDP per capita (2014) in selected countries **without the economic performance** of the capitals (+ Bavaria or Munich in Germany)



Source: [Own calculation based on Statista & Frankfurter Allgemeine \(2016\), Wirtschaftsfaktor Hauptstadt.](#)

Europe's Powerhouse

International trade (2017)

Imports

180bn €

17% of German imports



Exports

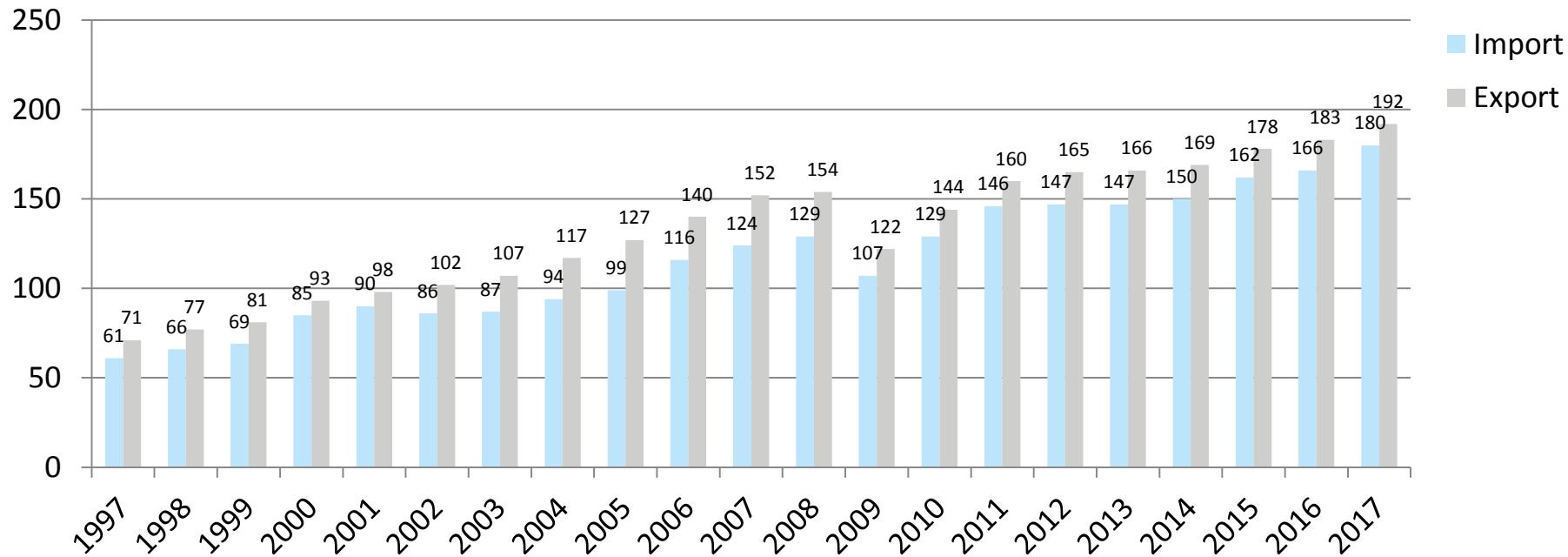
192bn €

15% of German exports



Europe's Powerhouse

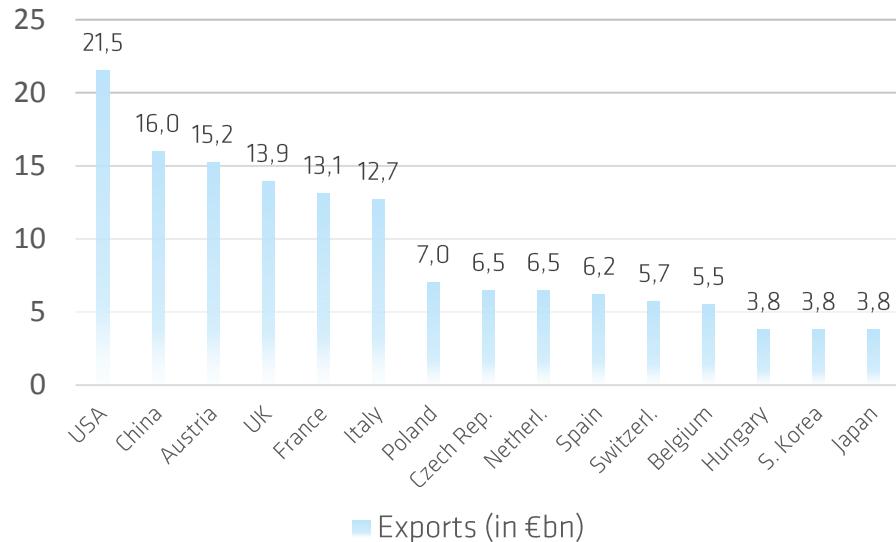
Development of international trade in billion €



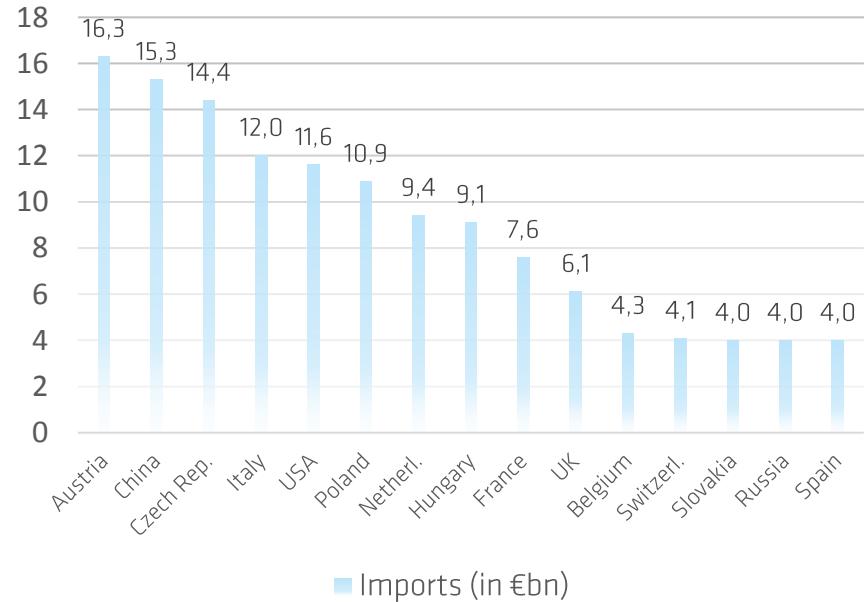
Europe's Powerhouse

International trade by countries in billion € (2017)

TOP 15 EXPORT MARKETS 2017

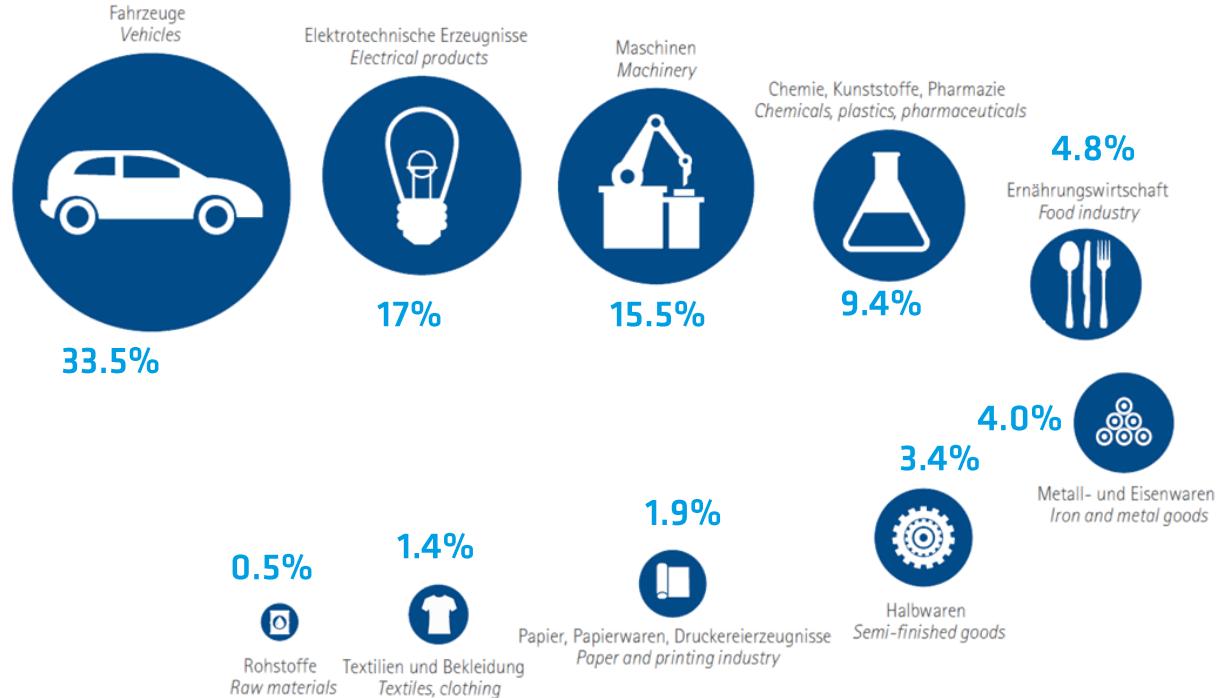


TOP 15 IMPORTERS 2017



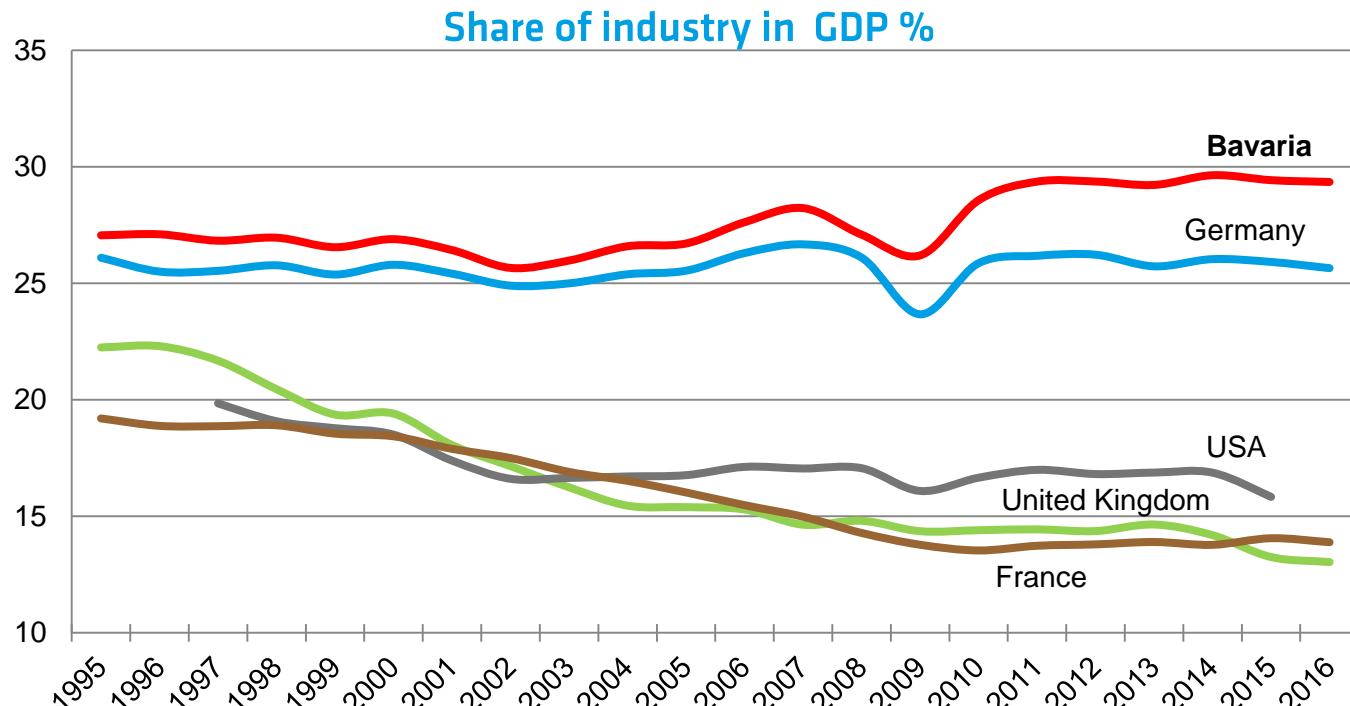
Europe's Powerhouse

Key exports (2016)



Bavaria - Europe's Powerhouse.

THE Manufacturing Hub in Europe



State of intelligent factories.

Bavaria's global players are leading the way.



Giesecke & Devrient



THE LINDE GROUP



Bavaria - In Great Company

National & Global Players in Munich

Industrial



Life Sciences



Tech



Media



Hidden champions – the unknown world market leaders.

The backbone of the German & Bavarian economy.

Hidden Champions are relatively unknown medium-sized companies that are European or international market leaders in niche market segments.



Internationality:



A significant number of hidden champions employ more than 1,000 employees worldwide



Strong **export performance**

1,500

Hidden champions in Germany



Distinctive ability to innovate:



Per 1,000 employees, they are granted five times as many patents as large companies

Valued employers:



Secure and well-paid jobs



Long-term business orientation



Almost 70% of the international market leaders from Germany are not listed on the stock exchange and **completely Family-owned** (managed by the owner)

Proximity to customers:



38% of employees are regularly in contact with customers

The states of **Bavaria**, Baden-Württemberg and North Rhine-Westphalia account for just over 70% of all German international market leaders.

Trade Shows in Bavaria!

Where To Find New Partners:

Visit Trade Shows in Bavaria!

Messe München International portfolio covers 40 trade fairs for industrial goods, consumer goods and new technologies, e.g.:



Where To Find New Partners: Visit Trade Shows in Bavaria!

Messe Nürnberg



Messe Augsburg



Company Database!

Where To Find New Partners In Bavaria:

Use Company Database!

Make use of the “**Key Technologies in Bavaria**”-database to find your Bavarian business partner – free of charge!

www.bayern-international.de/en/company-database/

Choose your Key Technology

Choose your preferable location

Key Technologies in Bavaria

Quick text search:

Key Tech: All industries

Sub-sector: please choose

State Administrative Province: All administrative provinces

District: please choose

Advanced search ▶

Start search ▶



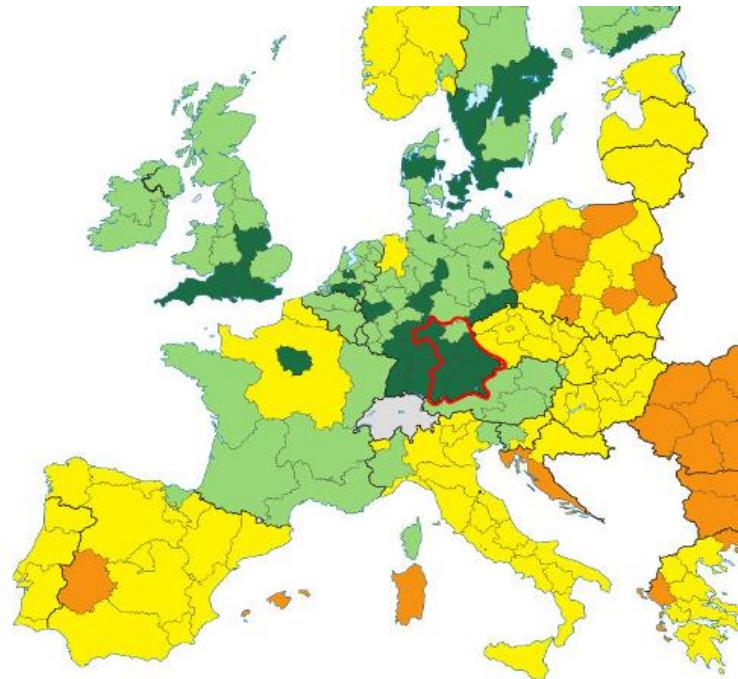
Bavaria - Technology & Innovation Hub

Bavaria – Technology Innovation hub

Innovation Leader

Regional Innovation Scoreboard 2016 developed by the European Commission:

- **6 out of 36 Innovation Leaders** in Europe are located in Bavaria
- **All** of the regions in Bavaria are “**Strong**” or “**Leaders**” in terms of Innovation
- All regions in Bavaria have **120% more EPO patent applications** than the European average



Source: Regional Innovation Scoreboard 2016 by the European Commission

Bavaria - Technology Innovation Hub

Innovation Leader

brand eins innovation survey 2018:

- Munich is Germany's leading city in terms of innovative companies



Source: brand eins

invest in bavaria

brand eins innovation survey 2018:

- Bavaria is Germany's leading state in terms of innovative companies

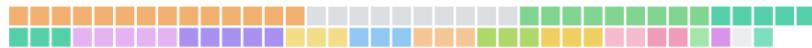
Bayern (130)



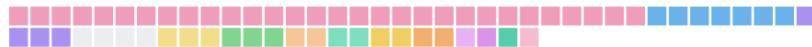
Nordrhein-Westfalen (84)



Baden-Württemberg (74)



Berlin (63)



Hessen (54)



Hamburg (36)

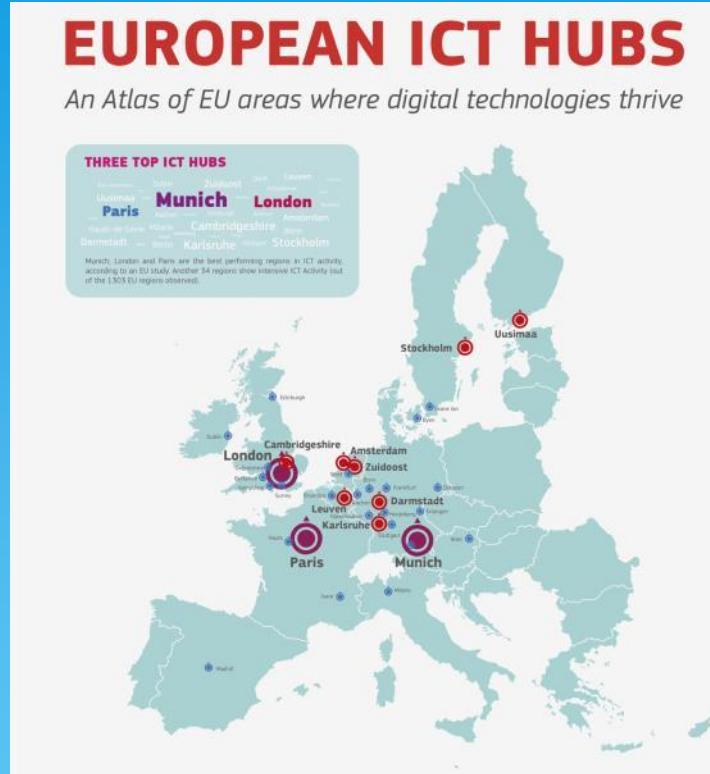




Bavaria - where Europe's digital future
is taking place

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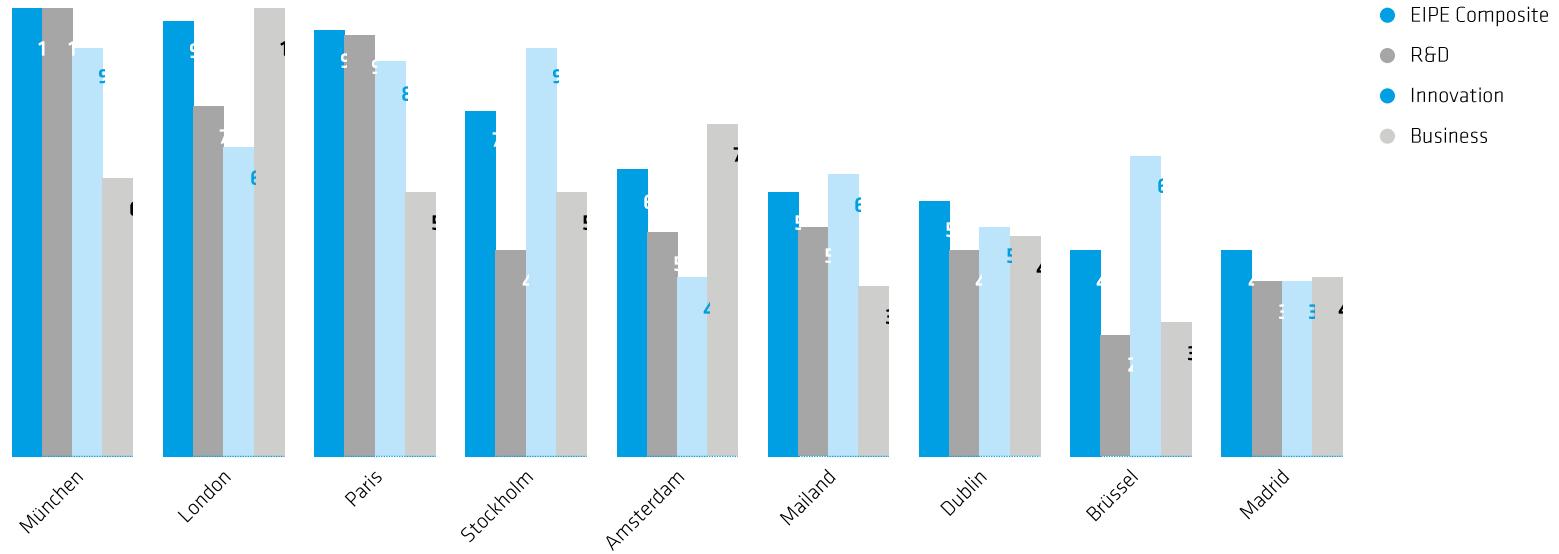
Munich is
by composite indicators
of 1,303 EU regions examined



Source: Studie „European ICT Poles of Excellence“ (EIPE)

Bavaria - where Europe's digital future is taking place

Munich is Europe's top ICT hub



Bavaria – Digitalization Initiative



Bavaria - Digitalization Initiatives

“Bayern Digital” and “Bayern Digital II”

- New **strategic program** by the Bavarian state government (2015-2022)
- Goal: Make Bavaria **a leading region of digitization** – Creating jobs of tomorrow
- Investments in infrastructure for broadband expansion: **2.5 bn €**
- Support for business-related projects **3.5 bn €** (cybersecurity, IT applications, education, 5G, AI and others)

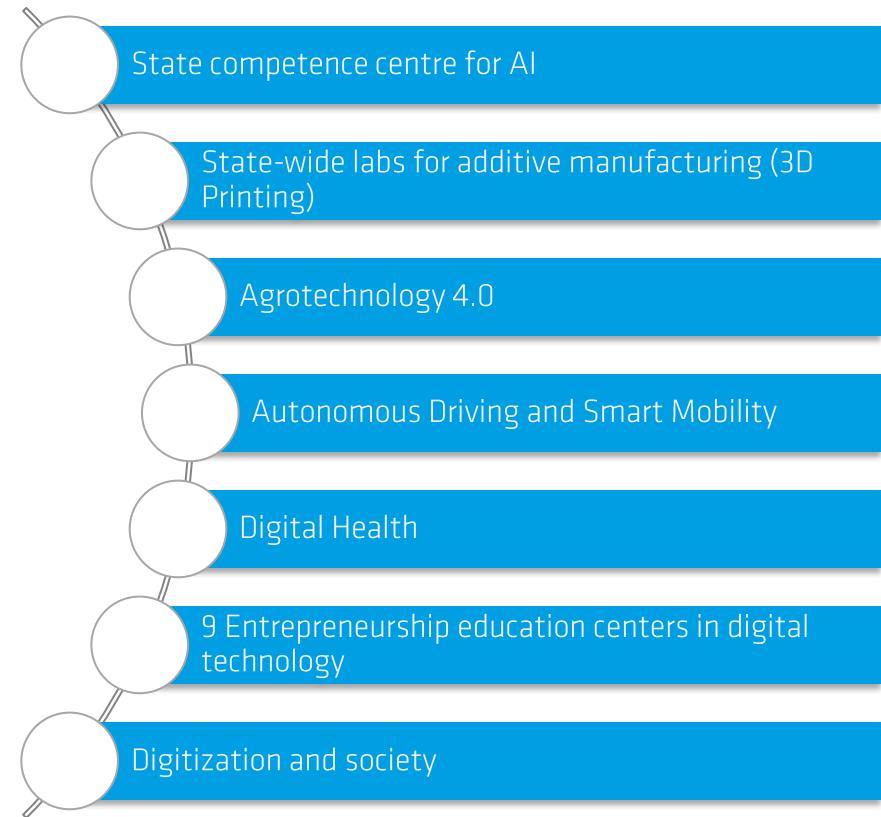


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Dr. Markus Söder
Minister President of Bavaria

Bayern Digital II

- €3billion programme for 2018-2022
- Location-specific projects for:
 - 5G (Nuremberg Metropolitan region)
 - Secure networked systems (Munich)
 - Robotics (Garching, Lower Franconia, Oberpfaffenhofen)
 - Autonomous Driving (Dingolfing, Ingolstadt, Kempten, Aschaffenburg)
 - State Bureau for Cybersecurity LSI (Nuremberg, Wuerzburg, Bad Neustadt/Saale)



Invest in Bavaria:

Partner for Business

Invest in Bavaria: Business promotion agency of the Free State of Bavaria

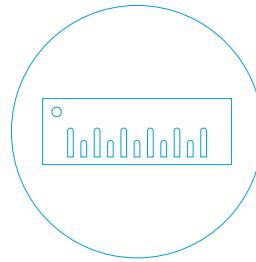
First point of contact for interested investors in
case of **setting up a new business or expanding
present facilities in Bavaria**

One-stop service for investors

The Business
Promotion Agency
of the State
of Bavaria



invest
in
bavaria



customized



free



confidential

Bavaria



Peter Englert

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