



NRW – INVESTMENT LOCATION NO. 1
IN GERMANY

NRW – ECONOMIC POWERHOUSE OF EUROPE



STATISTICS 2016

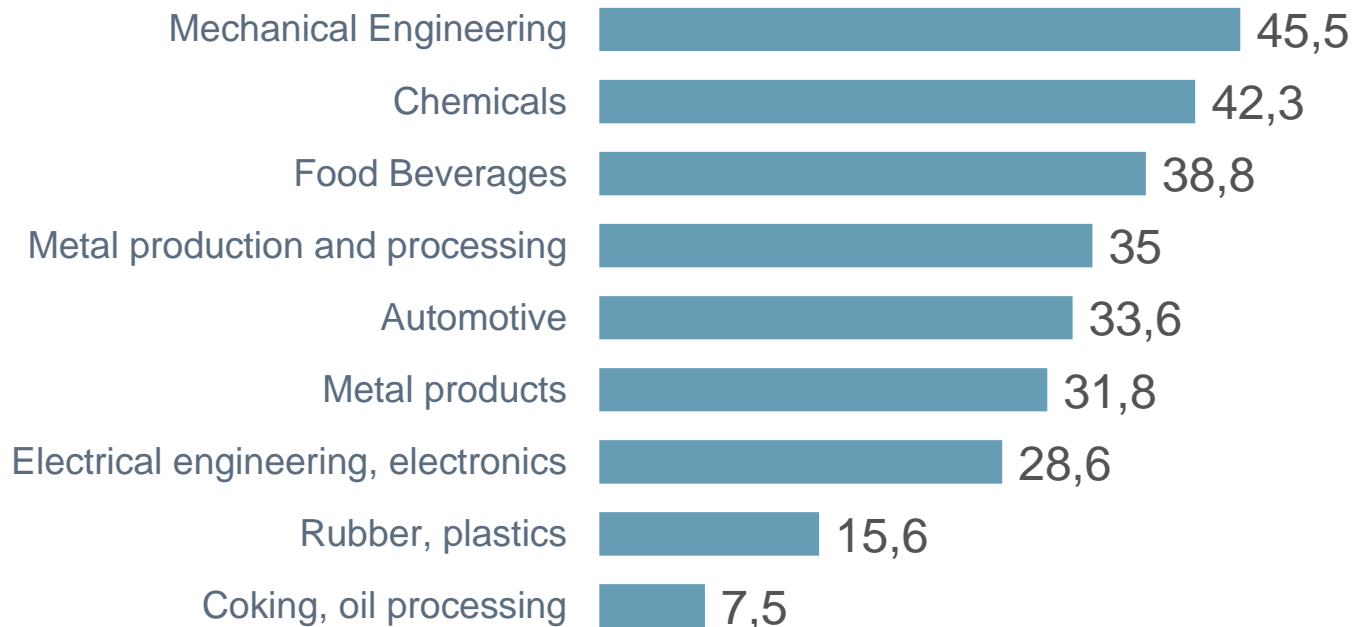
| | |
|----------------------|--------------|
| Area | 34.112 qkm |
| Population | 17,9 Mio. |
| Population density | 524 qkm |
| GDP | 670,0 Mrd. € |
| GDP per capita* | 36.509 € |
| Gainfully employed | 9,3 Mio. |
| Private consumption* | 379,0 Mrd. € |
| Exports | 180,0 Mrd. € |
| Imports | 207,0 Mrd. € |
| FDI** | 181,0 Mrd. € |

** End 2015, *2015

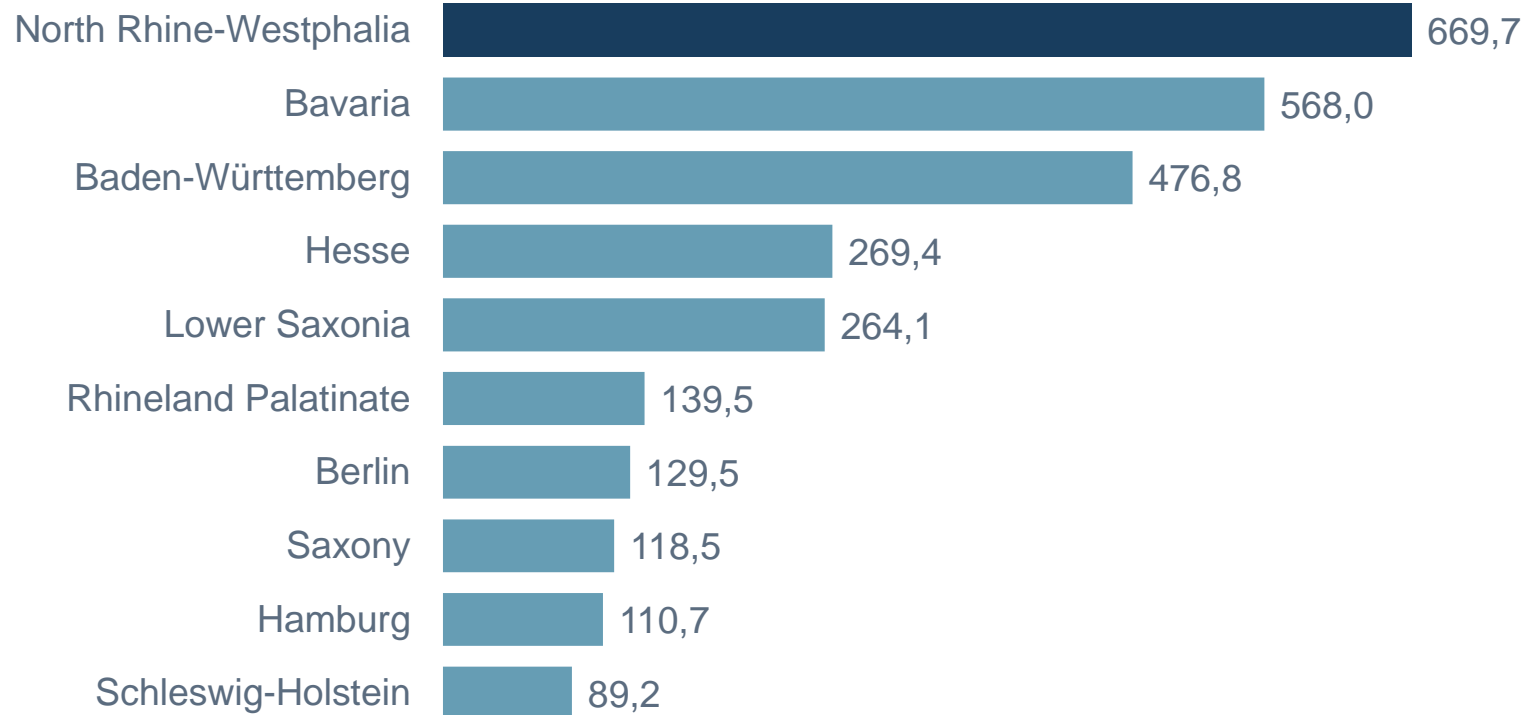
INDUSTRIAL HEARTLAND OF GERMANY



Sales 2016 (in Mrd. €)



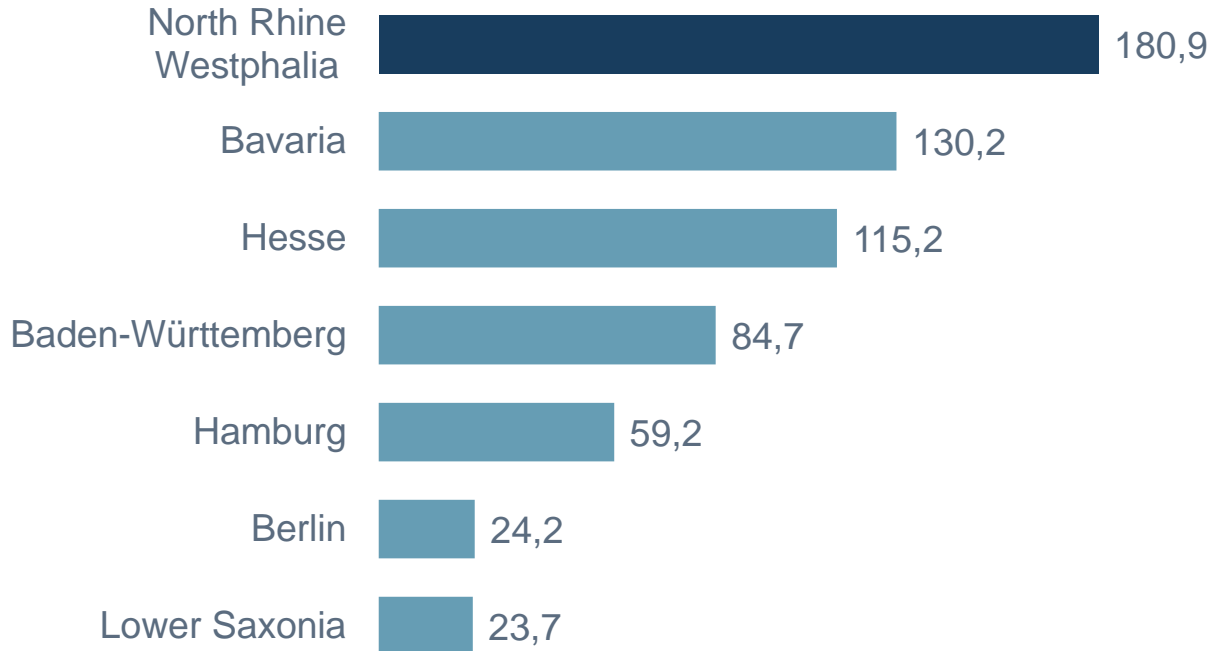
GERMANY'S GDP 2016 IN TOTAL: 3.133 MRD. EURO



INVESTMENT LOCATION NO. 1 IN GERMANY



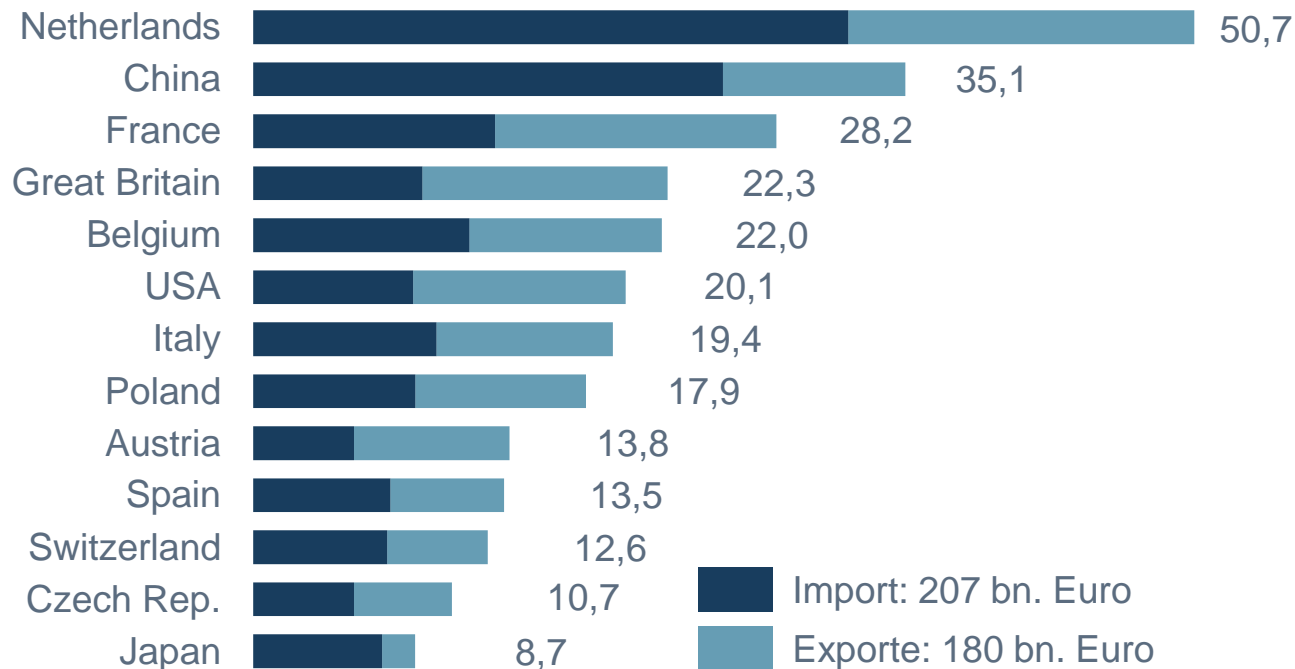
Foreign Direct Investment in Germany end of 2015 (in Bn. €)



387 BILLIONEN OF TRADE VOLUME



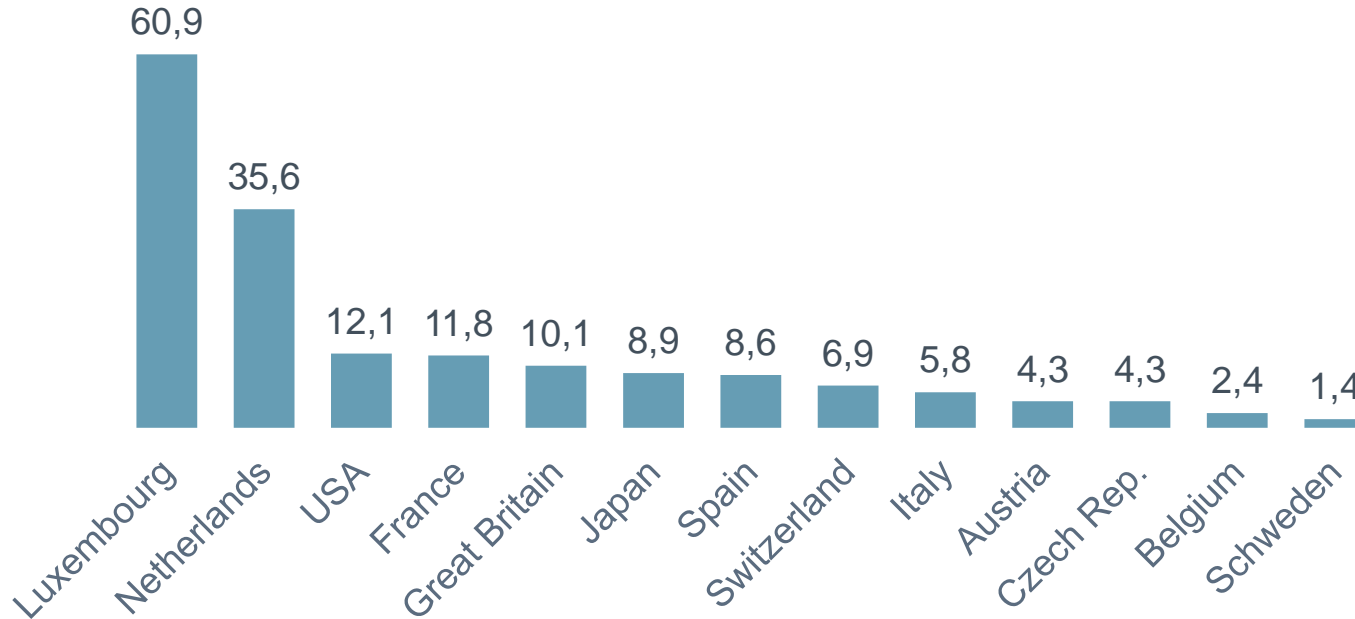
Important trading partners of NRW 2016 (in bn. €)



NETHERLANDS AND USA ARE LEADING INVESTORS



Biggest Foreign Investor Countries in NRW (in bn. EUR)



More than 19.000 foreign companies in NRW

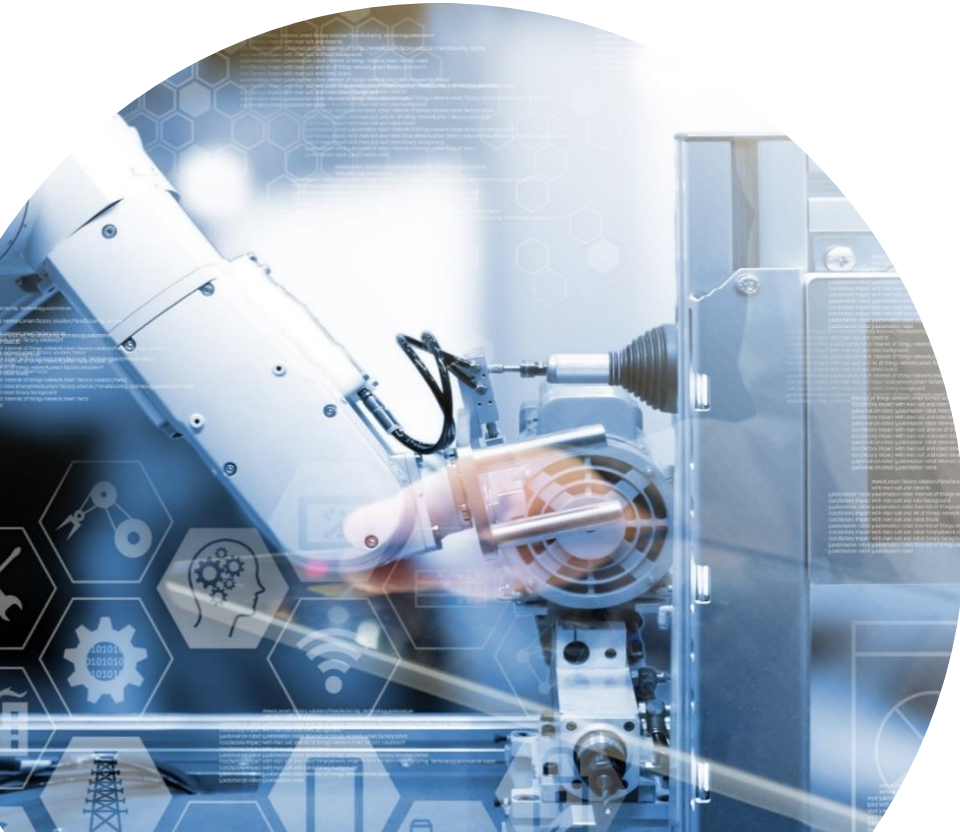


NRW – BEST LOCATION FOR FOREIGN COMPANIES

- 21,8 % of all foreign companies in Germany are located in NRW
- Foreign investors offering more than 1 Mio. jobs
- Major investors coming from Netherlands, USA, Swiss, Great Britain, France and PR China.

SELECTED US COMPANIES IN NRW





ONE OUT OF 5 GERMAN START-UP HAS ITS ORIGIN IN NRW

- App. 1/3 of IT-sales are generated in NRW
- 20 % of all Startups are located in NRW including success stories like auxmoney, trivago oder bitstars.
- App. 80.000 students studying information technology and electrical engineering – core competences for the digital economy



LOGISTICS COMPETENCE 1ST CLASS

- 25 % of all Logistics Centers of Germany are located in NRW (e.g. Amazon/ Rheinberg, Esprit/ Mönchengladbach, TK Maxx/Bergheim, Zalando/ Bergheim, UPS Cologne, Herne)
- 9 out of 25 of the biggest players operate their HQ in NRW (e.g. Deutsche Post DHL, Rhenus, UPS)
- More than 1 million sqm of logistics infrastructure per year under development in NRW

LOGISTICS COMPANIES (E.G.)



LOGISTICS INFRASTRUCTURE



MÜNSTER OSNABRÜCK AIRPORT

PADERBORN LIPPSTADT
AIRPORT

AIRPORT WEEZE

DORTMUND AIRPORT

DÜSSELDORF AIRPORT

- 3rd biggest passenger airport of Germany

KÖLN BONN AIRPORT

- Airfreight center for UPS, FedEx

Gateway Europes

ROAD NETWORK

- More than 2.200 km interstates
- 4.500 km motorways
- 13.100 km highways



RAILWAY NETWORK

- Dense railway network app. 6.000 km
- Turntable for European high speed train network
- Germanys biggest container transshipment point at Cologne-Eifeltor

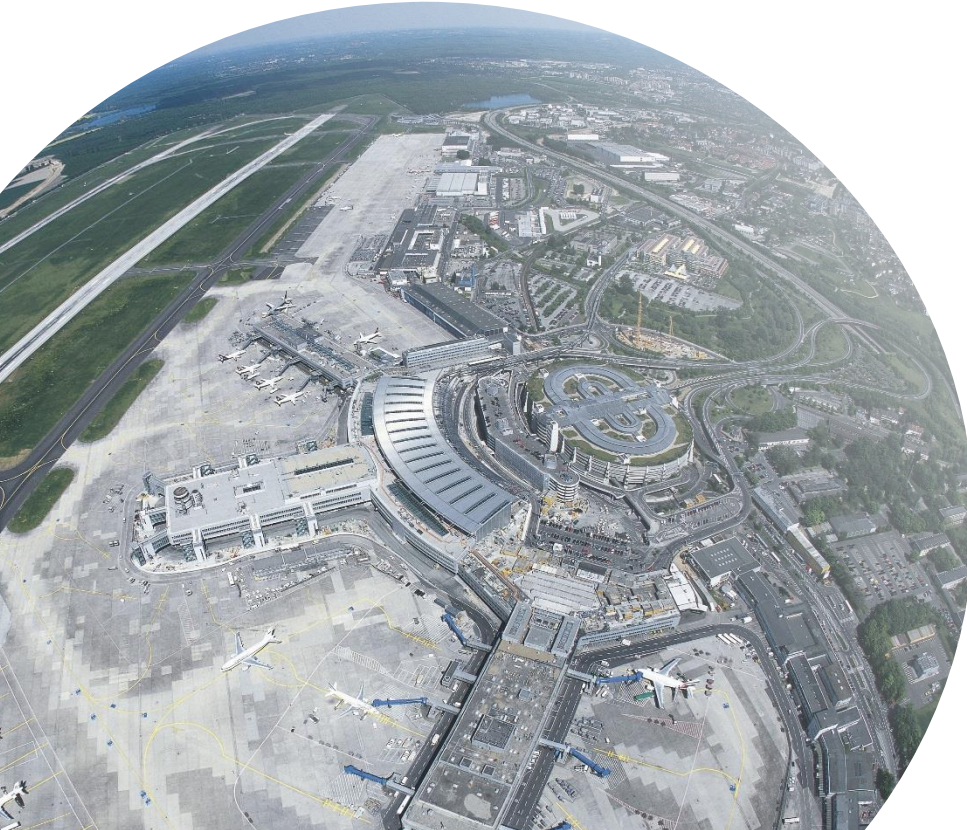


WATERWAYS

- Direct access to North Sea (Rotterdam), Baltic Sea, zum Atlantic, Mediterranean und Black Sea with more than 720 km waterways
- 226 km of river Rhine flow through NRW
- Biggest Inland-shipping harbour network in Germany with app. 120 harbours
- World biggest Inland-shipping harbour at Duisburg with app. 133 Mio tons handling goods



EXCELLENT INFRASTRUCTURE – EASY TO REACH



GATEWAY EUROPES WITH BEST INFRASTRUCTURE

- 2 international airports with intercontinental connections, 4 additional airports with european links
- More than 400 direct routes to the world
- Cologne/Bonn is Germanys Airfreight Center- No. 3

INFRASTRUCTURE FOR INVESTMENT IN NRW I



- App. 800 vacant industrial sites for investment and settlement
- Competitive pricing in comparison to international standards
- Industrial real estate „PrimeSite Rhine Region“ with 205 ha for big investments
- Internet - based infrastructure tool GERMAN.SITE for online site research:

FREE APP

**GERMAN.
SITE**



INFRASTRUCTURE FOR INVESTMENT IN NRW II

YOUR

PLUG & PRODUCE

SITE OPPORTUNITIES

TOTAL AREA

- 521.4 acres (*more possible*)
- unique in Western Europe

AVAILABILITY

- immediately

SUPPLY LINES

- the development of supply lines will be realized according to investors individual specifications

TECHNICAL/LEGAL RESTRICTIONS

- none

ELECTRICITY CONNECTION

- >>2.400 MWh/d
- Electricity supply from the substation at the location

DEVELOPMENT

- drinking water, industrial water and ground water well
- sewage disposal
- highpressure natural gas pipeline
- broadband internet



Example:
PRIME.SITE in
the Cologne
area

A satellite is shown in orbit above the Earth. The satellite has a central body with a large black lens-like structure, two large solar panel arrays extending outwards, and a parabolic antenna. The Earth's horizon is visible in the background, showing blue oceans and white clouds. The sky is dark with some stars.

- INNOVATIVE PROJECTS DEPEND ON INPUT FROM BRIGHT PEOPLE AND PARTNERS...

- ...WE OFFER INVESTORS AN ABUNDANCE OF JUST THE (B)RIGHT PARTNERS FROM INDUSTRY AND THE R&D-COMMUNITY.



BEST PREREQUISITES FOR TECHNOLOGY TRANSFER

- 70 universities
- 53 speciality R&D sectors at the universities
- More than 50 external R&D facilities
- More than 60 technology centers
- 30 technology transfer facilities



TOP-LEVEL R&D AND SCIENCE

- 14 Fraunhofer Institutes for applied R&D
- 12 Max-Planck-Institutes
- 11 Institutes of „Leibniz-Gemeinschaft“
- 15 Johannes-Rau-R&D institutes

MORE THAN 768.000 STUDENTS AT 70 UNIVERSITIES



GERMANY'S TALENT CENTER NO. 1

- 70 Universities
- More than 92.000 foreign students (12,0 % of all students) at NRW-universities
- More than 4.000 different courses
- More than 107.000 students successfully finishing their university studies.
- Elite-Universities: RWTH Aachen and University of Cologne

SME – BACKBONE OF THE ECONOMY



APP. 751.000 SMALL AND MEDIUM SIZED ENTERPRISES (SME)

- 99,5 % of all companies in NRW are SME
- 79,0 % of all jobs with social insurance contribution are represented by SME
- 82,1 % of all training courses are provided by SME



NRW - WORLDWIDE LEADING TRADE FAIR LOCATION

- Düsseldorf, Cologne, Essen and Dortmund
- More than 100 international leading trade fairs
- demexco, gamescom and medica etc
- More than 6 Mio. visitors



Who we are

- State owned Economic Development Agency
- HQ at Düsseldorf,
15 offices abroad



Competences

- International Location Marketing
- Direct Acquisition in Target Countries
- Settlement Consulting
- Key Account Management



Business Development

- Market- und Sectorenvironment
- Network and Partners



Know-how

- Talent and Recruitment
- R&D-Cooperation



Infrastructure

- Site Selecton
- Company Foundation



Netzwerk and Partnering

- Established SME environment
- Startup-Ecosystem & Digital Hubs
- Associations



10 good reasons



Strong, dynamic and central in Europe



Industrial heartland of Germany



Home to world market leaders



Germany's No. 1 investment location



Gateway to Europe with top transport infrastructure



10 good reasons



World class in research & development



One of the best talent pools in Europe



World-renowned logistics expertise



Poised to become Germany's leading digital location



Surprisingly varied: the quality of life in NRW

GET IN TOUCH



Michael Kordus
Head of Division
Western Europe, North America



Stephan Jungen
Project Manager North America

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