



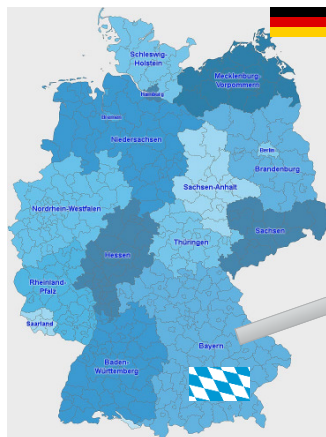
I. The economy of Munich, Upper Bavaria and Bavaria

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I. The economy of Munich, Upper Bavaria and Bavaria



Upper Bavaria - our homebase



Sources: <http://wiki-de.genealogy.net> , <https://www.faqnet.de>

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I. The economy of Munich, Upper Bavaria and Bavaria



Our region in comparison

	Area 01.01.2017		Population 30.08.2016		GDP 2017		Unemployment rate 2017
	in km ²	in %	in mil.	in %	in bn. €	in %	
Germany	357.000	100	82	100	3.263	100	5,7 %
Bavaria	71.000	20	12,8	16	594	18	3,2 %
Upper Bavaria	17.500	5	4,6	6	250*	8	3,3* %
Munich, City	311	0,1	1,5	1,8	104**	3	3,9 %

*Stand 2016; **Stand 2015

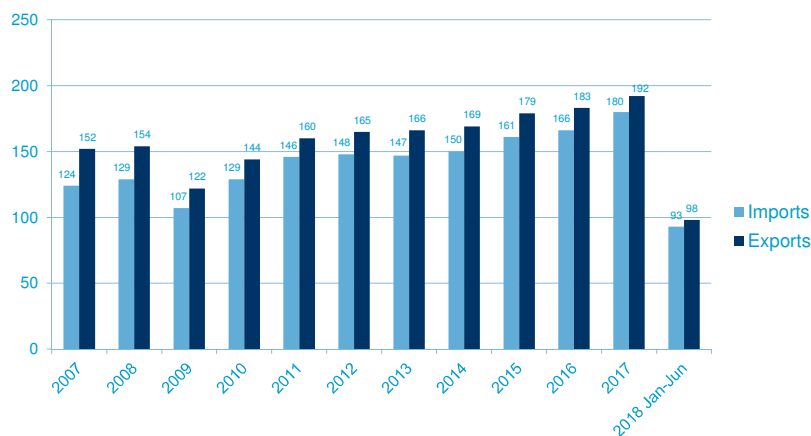
Source: Bayerisches Landesamt für Statistik und Datenverarbeitung, Statistisches Bundesamt Deutschland, Statistical departments of the federal states, Arbeitsagentur, and own calculations.

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I. The economy of Munich, Upper Bavaria and Bavaria



Bavaria's imports and exports 2007 – 2018 (in billion EUR)



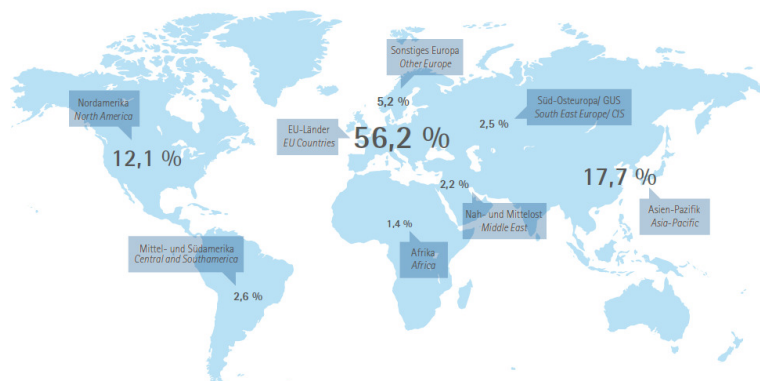
Source: Bayerisches Landesamt für Statistik und Datenverarbeitung own diagram

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I. The economy of Munich, Upper Bavaria and Bavaria



Bavaria's Exports by Regions 2017



Quelle | Source: Bayerisches Landesamt für Statistik
Vorläufige Daten für das Jahr 2017 | Provisional data for the year 2017.

I. The economy of Munich, Upper Bavaria and Bavaria



Bavaria's Top 10 export markets 2017

	TOP 10 Bavaria's Export Markets	bn. EUR	Variation to 2016 (%)
1.	USA	21,5	4,7
2.	China	16,0	7,1
3.	Austria	15,2	4,6
4.	Great Britain	13,9	-6,6
5.	France	13,1	4,0
6.	Italy	12,7	8,0
7.	Poland	7,0	9,2
8.	Czech Republic	6,5	3,2
9.	The Netherlands	6,5	3,1
10.	Spain	6,2	13,8
20.	Mexico	2,38	33,3
	Total Bavarian exports (2017)	192,1	5,4

Source: Bayerisches Landesamt für Statistik und Datenverarbeitung, Statistisches Bundesamt Deutschland, Statistical departments of the federal states (Updated: 03.07.2018)

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Bavaria's Most Dynamic Export Partners 2017

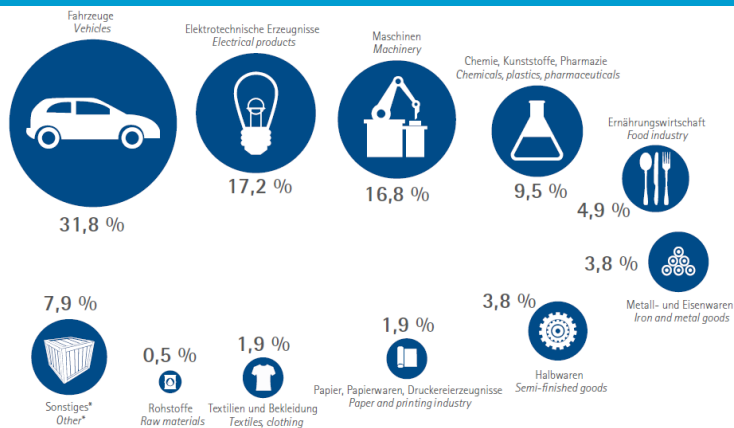


Source: Bayerisches Landesamt für Statistik
Provisional data for the year 2017

I. The economy of Munich, Upper Bavaria and Bavaria



Bavaria's Exports by product groups (2017)



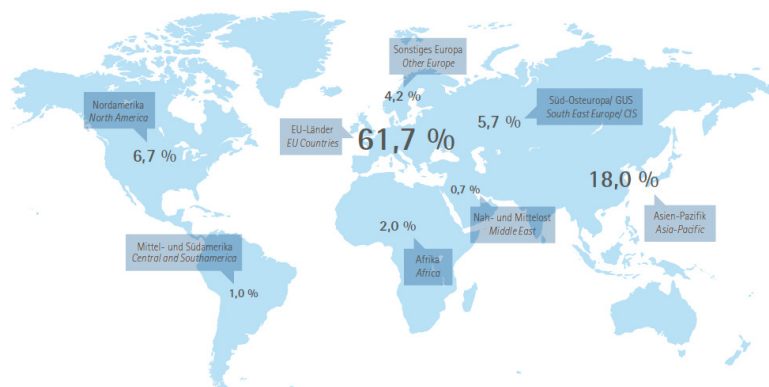
* Fabrikationsanlagen, Hilfslieferungen und weitere Produkte | Plant facilities, aid shipment + others

Quelle | Source: Bayerisches Landesamt für Statistik und Datenverarbeitung
Vorläufige Daten für das Jahr 2017 | Provisional data for the year 2017.

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Bavaria's Imports by Regions 2017



Quelle | Source: Bayerisches Landesamt für Statistik
Vorläufige Daten für das Jahr 2017 | Provisional data for the year 2017

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Bavaria's Top 10 import markets 2017

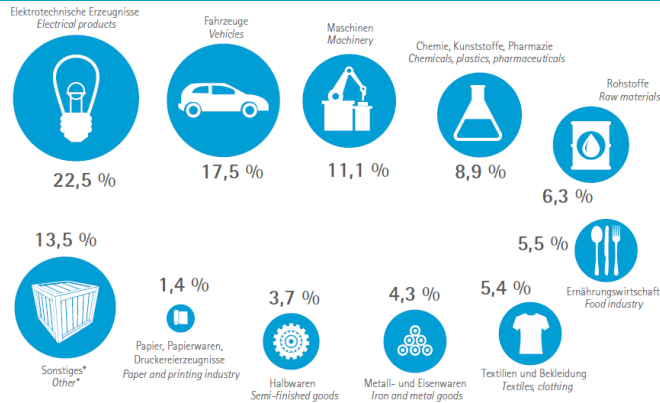
	TOP 10 Bavaria's Sourcing Markets	bn. EUR	Variation to 2016 (%)
1.	Austria	16,3	7,5
2.	China	15,3	6,5
3.	Czech Republic	14,4	10,3
4.	Italy	12,0	7,7
5.	USA	11,6	-0,4
6.	Poland	10,9	12,6
7.	The Netherlands	9,4	3,5
8.	Hungary	9,1	6,5
9.	France	7,6	16,6
10.	Great Britain	6,1	8,1
32.	Mexico	0,88	15,7
	Total Bavarian imports (2017)	179,8	8,2

Source: Bayerisches Landesamt für Statistik und Datenverarbeitung, Statistisches Bundesamt Deutschland, Statistical departments of the federal states (Updated: 03.07.2018)

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Bavaria's Imports by product groups (2017)



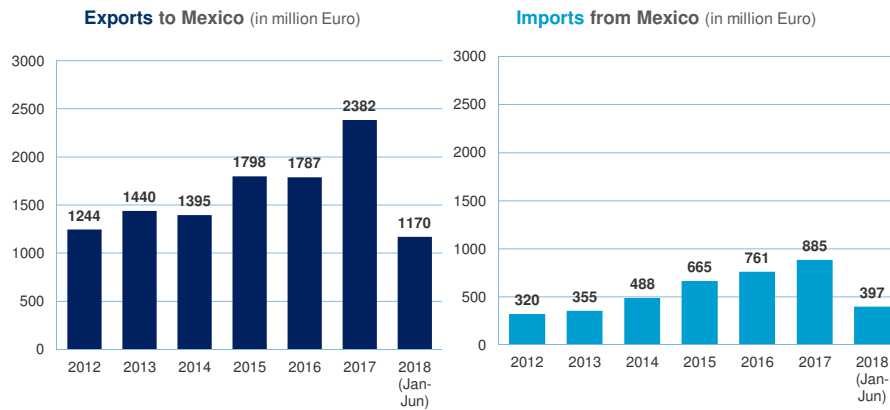
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Bavarian Foreign Trade with Mexico 2012 - 2018



I. The economy of Bavaria, Upper Bavaria and Munich



Global players in Upper Bavaria



Sources: www.bmw.de, www.audi.de,
www.allianz.de, www.siemens.de

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I. The economy of Bavaria, Upper Bavaria and Munich



Hidden champions in Upper Bavaria



Sources: www.krebs-nachrichten.de,
www.hstt.net

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I. The economy of Bavaria, Upper Bavaria and Munich



Education and science

Higher education in Bavaria:

- 13 universities
- 28 universities of Applied Sciences
- 8 art colleges
- 7 church driven universities



Sources: www.commonswiki.org, www.nebenbei-studieren.de,
www.munich-startup.de, www.make-munich.de,
www.institut-seltene-erden.de



- Scholarship system for outstanding students („Elitenetzwerk Bayern“)
- Intense cooperation of science and private industry
- Plenty of research institutes in Bavaria: 33 Fraunhofer Institutes + HQ, Max-Planck Society: HQ + 13 Institutes, 2 Helmholtz Research Centres, etc.

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I. The economy of Bavaria, Upper Bavaria and Munich



Innovation clusters

- “Cluster Initiative Bavaria” by the Bavarian state government
- 17 cluster platforms
- Focus: Technology- and industry-oriented innovation
- Clusters link up multinational companies, small- and medium enterprises (the “Mittelstand”), and research institutions from all over Bavaria



Sources: <https://www.cluster-bayern.de>, <http://chemiecluster-bayern.de/>

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Trade fair location Munich

Messe München GmbH:

Revenue	428 million €
Exhibitors	37.000
Exhibition area	470.000 m ²
Visitors (p. A.)	2.000.000

- Host of fairs in China, India, Turkey and South Africa
- More than 60 agencies abroad



Sources: www.muenchen.de,
www.hotel-villa-hofmann.de

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Trade fair location Nuremberg

NürnbergMesse GmbH:

Revenue	168 million €
Exhibitors	27.800
Exhibition area	170.000 m ²
Visitors (2017)	1.192.000

- 50 representations in 116 countries
- 5 fully owned subsidiaries abroad: Brasil, China, India, Italy, USA



Figures for 2017
Source: <https://www.nuernbergmesse.de>

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I. The economy of Bavaria, Upper Bavaria and Munich



Munich airport

Flughafen München (Munich Airport):

Traffic	2 nd in Germany, 9 th in Europe, 38 th worldwide
Airline companies	102
Destinations	74 countries, 266 cities
Passengers	44,6 million per year

- Opened in 1992
- Flughafen München GmbH: Full service operator covering all fields of airport management



Figures for 2017
Source: <https://www.munich-airport.de>

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II. The Chamber of Commerce and Industry for Munich and Upper Bavaria and its network

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II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



Where we are



- 79 Chambers of Commerce and Industry in Germany
- Umbrella organization:
 - DIHK (Association of German Chambers of Commerce and Industry)
 - BIHK (Association of all 9 Bavarian Chambers of Commerce and Industry)

CCI for Munich and Upper Bavaria



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II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



Bayerischer Industrie- und Handelskammertag (BIHK)



- 990,000 enterprises in membership (CCI Munich: 390.000 members)
- More than 53,500 enterprises active as voluntary examiners
- 560 events on export opportunities with 12,500 participants
- Connected on local and regional levels



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History of the CCI for Munich and Upper Bavaria

1842



Legal basis for Bavarian CCIs under the
rule of King Ludwig I. of Bavaria

1843



CCI for Munich and Upper Bavaria was established
First President: Joseph Anton von Maffai

Today



President:
Dr. Eberhard
Sasse



CEO:
Peter Driessen



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Tasks of the CCIs (§ 1 Chamber of Commerce and Industry act)

- Safeguard the overall interests of trade and industry
- Support trade and industry
- Provide vocational training (dual system) and professional training
- Assist authorities through proposals, opinions and reports
- Maintain decency and manners of the honorable businessman
- Accomplish tasks delegated by the state

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II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



Self-regulating body of the economy

Obligated to members only

Public administrative tasks

Enterprise related solutions

- Intensive exchange with its members
- ability to fulfill tasks in a more enterprise-centric fashion than the German state



Examples:

- Authentication of foreign trade documents
- Exams in connection with the dual vocational system

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II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



The Department of Internationalization – Our Services

- Individual support for companies regarding all international issues
- Major Events, Business roundtables, Roadshows and Workshops



- Foreign trade and investment information
- Free monthly newsletter and publications



- Exporttag Bayern
- "Exportpreis Bayern" - Bavarian Exporters Award

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The Department of Foreign Trade – Our Services

- Authentication of foreign trade documents
- Access to the worldwide AHK network and to the Bavarian and German foreign trade programmes
- EU programmes and coordination of EU politics



II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



The German AHKs



- Foreign Chambers of Commerce
- 140 locations in 92 countries
- 45.000 member companies worldwide
- Support German and foreign businesses in their activities abroad and in Germany
- 500.000 queries each year
- Coordinated by the DIHK e.V.



AHK Mexiko - CAMEXA

- Cámara Mexicano- Alemana de Comercio e Industria, founded in 1929
- More than 800 member companies
- Service provider for German and Mexican companies
- Representation of the interests of the German economy in Mexico
- Regional offices: Puebla, Jalisco, Bajío Region, Northern Region

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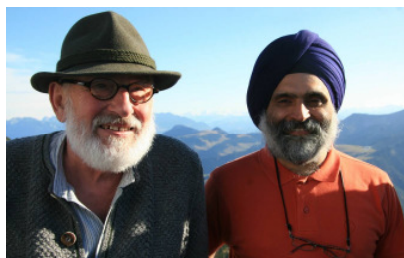
II. Chamber of Commerce and Industry for Munich and Upper Bavaria and its Network



Bavarian international business assistance

- Delegation trips with the Minister of Economics
- 27 Bavarian representative offices: one in Mexico
- "Bavarian pavilions" - International trade fair programme
- "Bayern – Fit for Partnership"
- "Solutions – Made in Bayern"
- "Go International"
- AWZ: Backoffice for all Bavarian CCIs
- www.auwi-bayern.de

- Bayern International
- Financial support by the LfA Förderbank Bayern
- "Exportpreis"- Bavarian Export Award
- Management Training International



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Support for Bavarian SMEs at trade fairs abroad

- The trade fair participation program offers Bavarian SMEs the opportunity to present themselves within a Bavarian joint booth (Bavarian pavilion) at trade fairs worldwide.
- The participation is partially funded by the Bavarian Ministry of Economic Affairs.
- The participation program is organized by the team of Bayern International GmbH in cooperation with the Bavarian Chambers of Commerce and Industry (IHKs).

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Support for Bavarian SMEs at trade fairs abroad



2017:

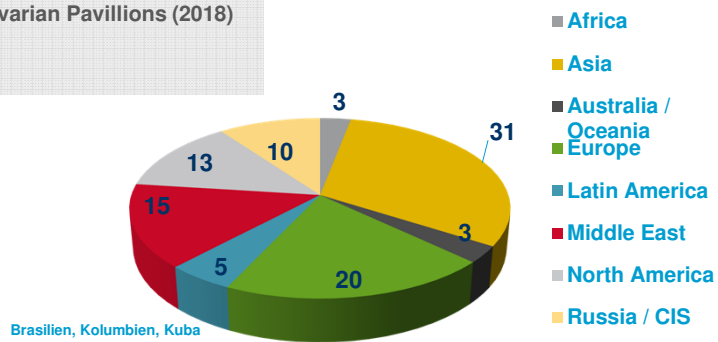
- 23 financially supported joint booths
- 4 joint booths without financial support
- 20 information and service centers
- 6 ConferencePlus booths
- Participation in 29 countries
- 453 exhibitors

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Support for Bavarian SMEs at trade fairs abroad

Regional distribution of the Bavarian Pavillions (2018)



III. Opportunities and challenges for the Bavarian economy

III. Opportunities and challenges for the Bavarian economy



Opportunities: Migration and the shortage of skilled workers



Source: Bayerischer Rundfunk

- Economic worsening foreseeable due to demographic change
- CCIs support integration of refugees in the job market
- Today: 139.000 open positions without suitable applicants in Bavaria, many of them in the dual education system
- [„Fachkräftemonitor Bayern“](#)

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III. Opportunities and challenges for the Bavarian economy



Opportunities: Nuclear phase-out and expansion of renewable energy

- Shutdown of all German nuclear power plants until 2022 enacted
- Change to renewable energy threatens service security of electric grid
- Construction of 1015 km electrical power lines planned in Bavaria



Source: www.bilder4.n-tv.de

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III. Opportunities and challenges for the Bavarian economy



Opportunities: Digitization and expansion of broadband internet



ZD.B ZENTRUM
DIGITALISIERUNG
BAYERN

Sources: www.zentrum-digitalisierung.bayern,
www.sat1bayern.de

- 18% of small and medium-size enterprises use possibilities of digitalization intensely
- Investments of state government until 2018:
 - 1,5 billion Euro for expansion of high-speed internet
 - 500 million Euro for digitalization of the Bavarian economy

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III. Opportunities and challenges for the Bavarian economy



Opportunities: Innovation and disruptive business models




Source: www.theculturelp.com

Potentially disruptive technologies:

- Mobile internet
- Cloud-technology
- 3-D printing
- Renewable energies
- Autonomous driving
- Energy storage
- Advanced robotics
- Next-generation genomics
- ...

(Source: McKinsey, 2015)

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IV. The German System of Vocational Education and Training (VET)

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IV. Vocational Training

The Concept of Dual Vocational Education

Around 350 different jobs, e.g. in industry, commerce or administration



© Melling liudmila / pixelio.de

Company



Apprentice



© Karl-Heinz Laube / pixelio.de

Vocational Training School



München und Oberbayern

„IHK-Lehrstellenbörse“

Tasks of the CCI:

- Screen and advise companies
- Register vocational training contracts
- Administer interim and final exams

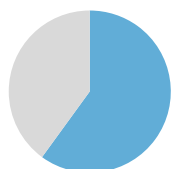
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Vocational Training in numbers

Average costs of a trainee in the dual system a year: **€ 15.000**

About **1,5 million** trainees all over Germany working for approximately **500,000 companies** providing training

More than **92,000** new apprenticeship agreements in Bavaria (2015)



Percentage of each age group starting an apprenticeship in the dual system:

60%

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Training in companies and schools

2 - 3.5 Years Training Period

on the job training in companies

- 3 - 4 days a week
- based on training contract between company and trainee

theoretical training in vocational schools

- 1 - 2 days a week
- run by the state



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IV. Vocational Training IHK

The role and main responsibility of enterprises in VET

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IV. Vocational Training IHK

Preconditions for implementation of VET

1. VET needs a commitment in society to concede a leading role to enterprises.
2. VET can only bring benefit for economic development, if the training and learning topics are created to match the needs
3. VET can only occur in a legal framework with good balance of regulations and flexibility.
4. External evaluation of learning outcomes safeguard minimum standards for the level of competences targeted

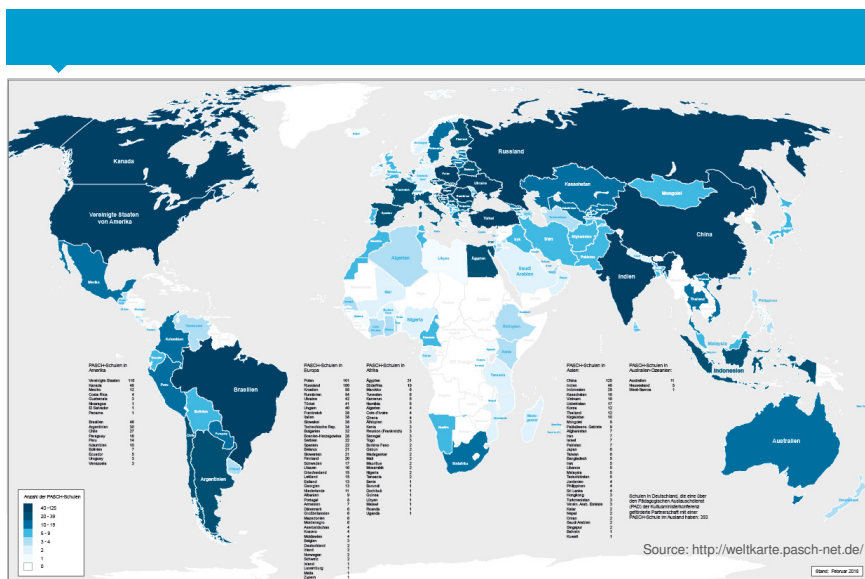
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V. The Global network of schools teaching German abroad

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V. Global network of schools teaching German abroad



V. Global network of schools teaching German abroad



PASCH - The "Schools: Partners for the Future" Initiative

The PASCH initiative

- network of 1,800 schools
- with an emphasis on teaching German:
 - German schools abroad
 - Schools within the national education systems with a high focus on German
- Worldwide 450.000 learners of German language at schools,



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V. Global network of schools teaching German abroad



PASCH-schools in Mexico



Number of schools in Mexico:

- **DAS: 5**
German schools abroad
- **DSD-Schools: 2**
schools within the national education systems offering the German language diploma
- **Fit-Schools: 5**
schools within the national education systems starting to teach German

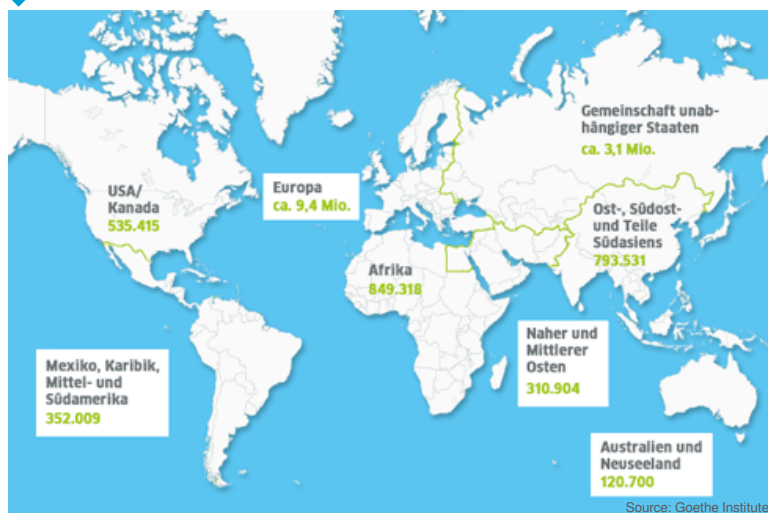
German Schools in Mexico (since 1894): Colegio Alemán Alexander von Humboldt
 3x in DF: Xochimilco, Lomas Verdes, La Herradura
 1x Puebla and 1x Guadalajara

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Global network of schools teaching German abroad



German as foreign Language - worldwide



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Any questions - preguntas?

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Muchas gracias!



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