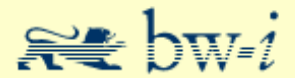


Measuring & Control Technology in Europe



Baden-Württemberg

Baden-Württemberg International



Measuring & Control Technology in Europe

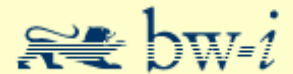
The purpose of this presentation is to:

- Demonstrate the importance of the European Union – the world's largest single market
- Outline its future dimensions as it expands towards the east
- Describe the present status and future prospects for measuring & control technology within this market
- Explain why Baden-Württemberg is the ideal location from which to serve the measuring & control technology market – Europe wide

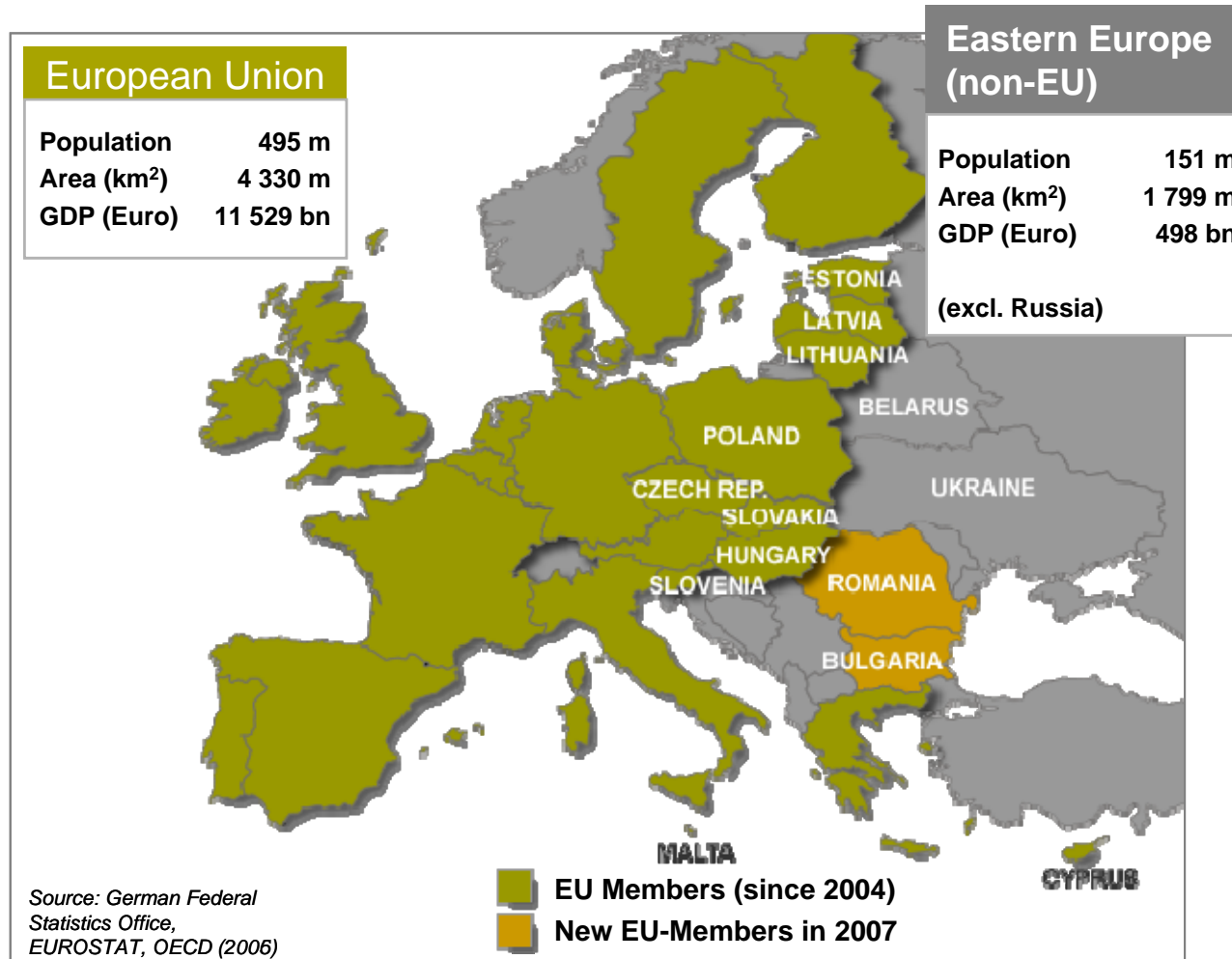


Baden-Württemberg

Baden-Württemberg International



Europe is expanding towards the East



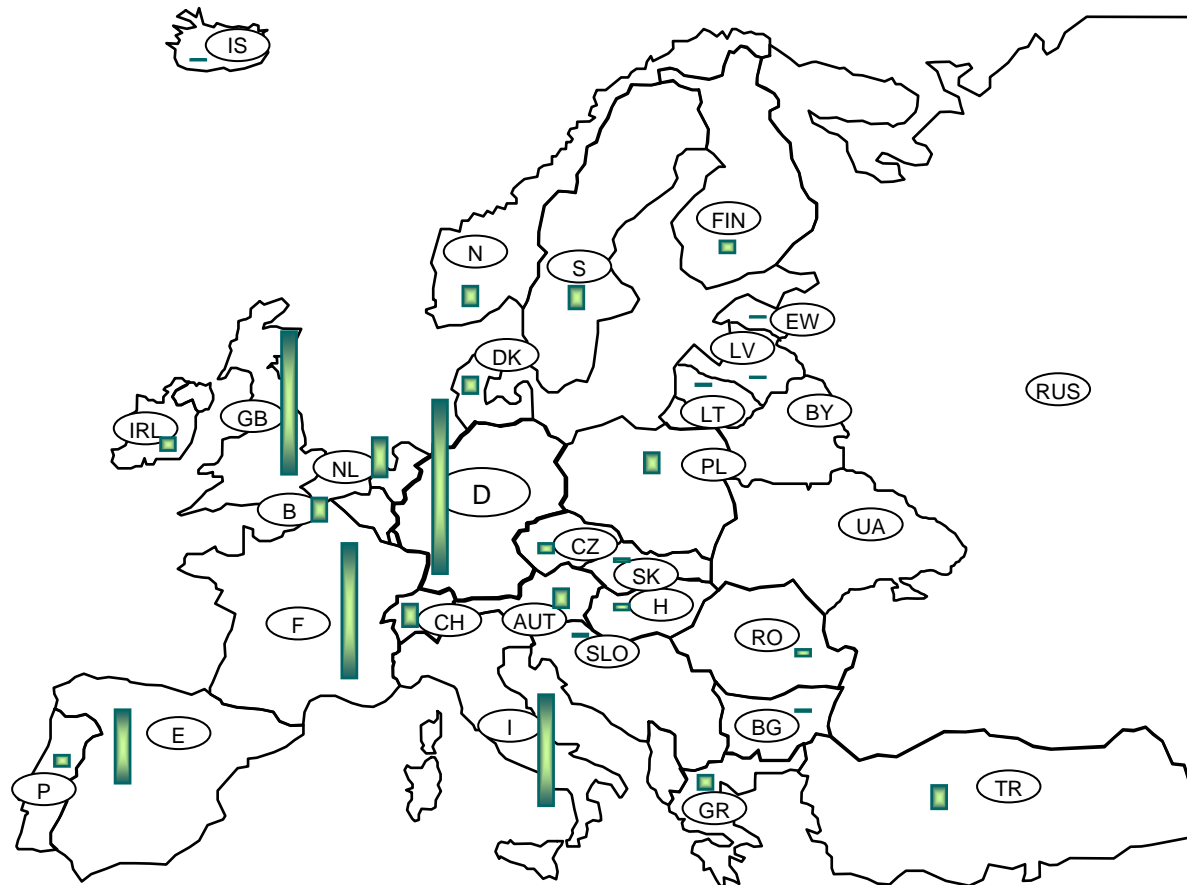
In the last two decades, the sharp contrasts between the Western and the Eastern European countries have been fading and the European Union is the major driver for Europe's integration.

Since May 2004, Poland, the Czech Republic, Slovakia, Hungary, Slovenia, the Baltic States, Cyprus and Malta are members of the European Union. In 2007, Romania and Bulgaria are have joined the EU.

European integration opens up a vast market for your company with untold market opportunities.



The leading Markets in Europe



In 2006, the 27 member states of the European Union had a total Gross Domestic Product of Euro 11 529 bn, exceeding the GDP of the USA (Euro 10 550 bn) and Japan (Euro 3 478 bn).

Four of the member states – Germany, Italy, France and the UK – are among the six largest economies of the world. Of these, Germany has the highest GDP, the largest population, and the highest purchasing power.

Within Germany, the State of Baden-Württemberg, Germany's southwest, is one of the most prosperous and innovative regions.

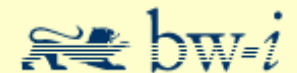
Source: German Federal Statistics Office, EUROSTAT, OECD (2006)

■ Dimension of total GDP

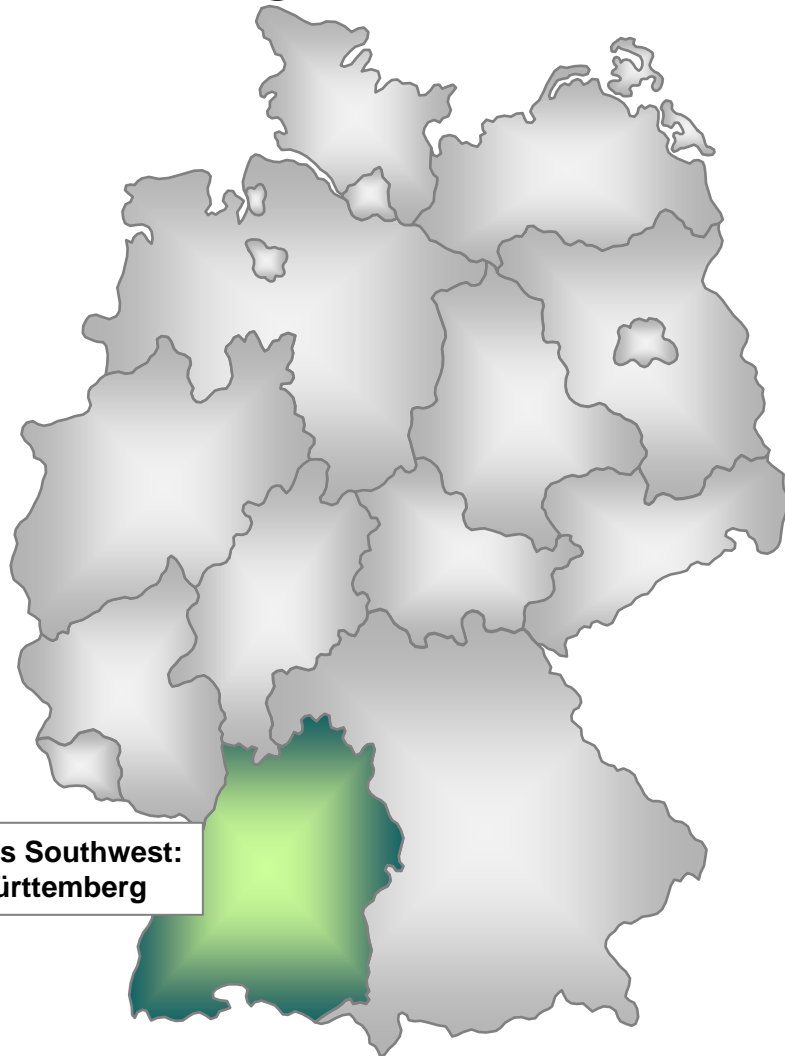


Baden-Württemberg

Baden-Württemberg International



The right Location for Growth and Prosperity



Germany's Southwest:
Baden-Württemberg

Baden-Württemberg is already the most highly industrialized and one of the most prosperous regions in Germany.

Its proximity to important markets – east and west – makes it an ideal location for pan-European activities.

And it has further merits:

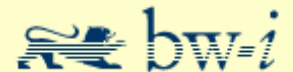
- It has a highly developed infrastructure – suppliers, R&D facilities, business services.
- Its workforce is well trained, innovative and productive.
- Its companies have an established export orientation and know how to penetrate new markets.

It is set to succeed in the 21st Century.



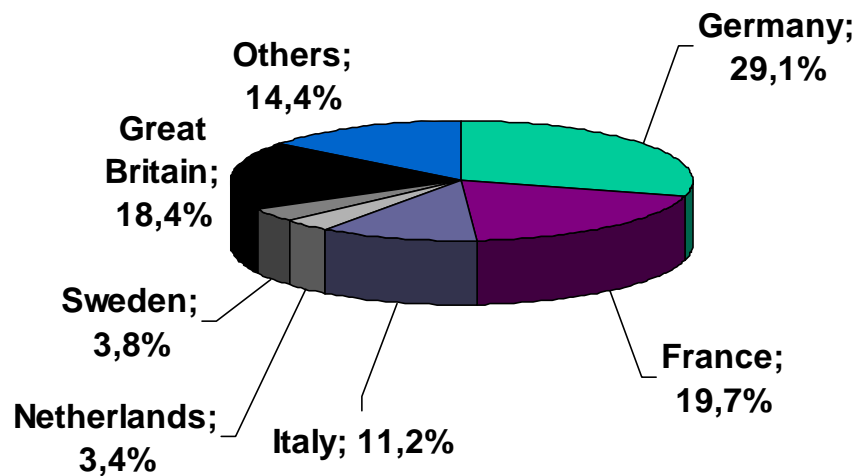
Baden-Württemberg

Baden-Württemberg International



Germany's leading position in the European Measuring & Control Market

Turnover of the EU-Countries in the
Measuring & Control Sector (in %)



Source: Eurostat, figures from 2004

15 % of the companies in this sector are located in Germany. Germany has the leading position in den EU.

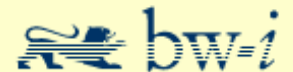
The driving forces behind this are:

- Technological innovations in the user industries
- Rationalization and quality consciousness
- New applications resulting from environmental legislation
- Wider acceptance of EU-norms



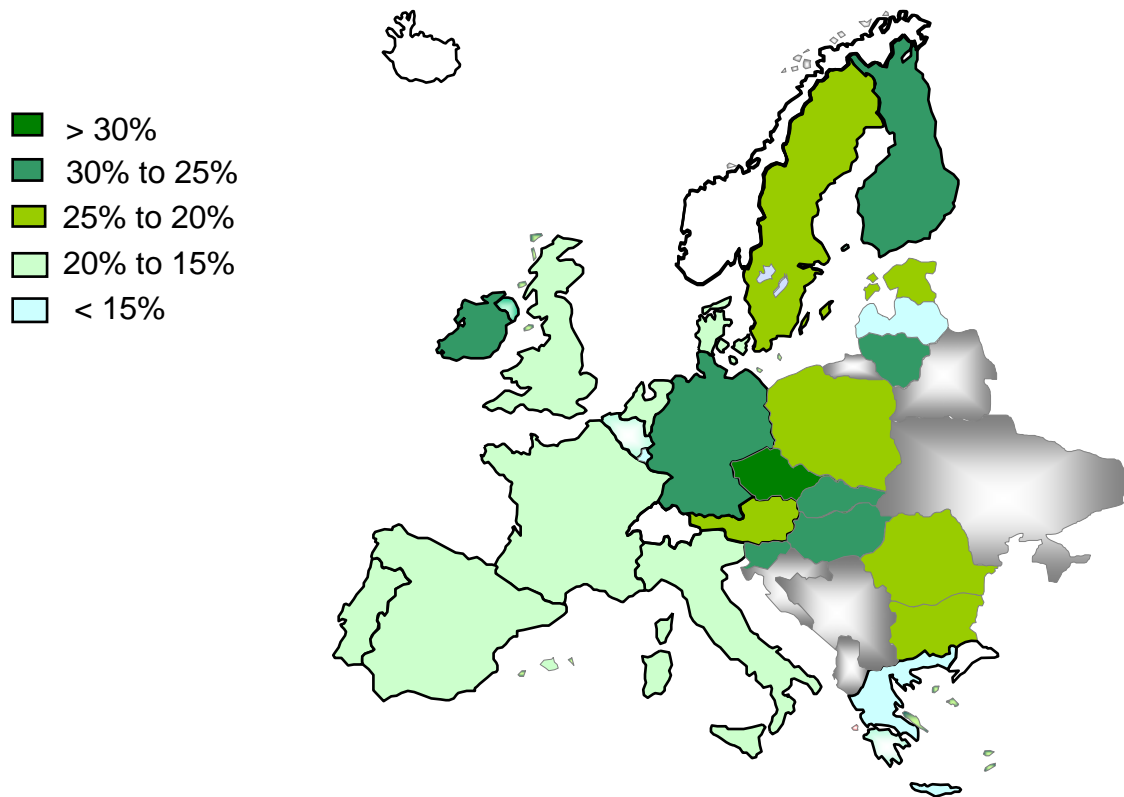
Baden-Württemberg

Baden-Württemberg International



A Foothold in Germany ensures Proximity to Industrial Customers

The Manufacturing Industry Share of the Domestic Content (in %)



Among the Western European countries, Germany has with 26% the highest share of the domestic content in the manufacturing industry.

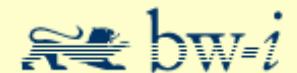
For a producer of Measuring & Control Technology, a foothold in Germany ensures close proximity to a large number of customers and suppliers.

Source: Eurostat



Baden-Württemberg

Baden-Württemberg International



Growth Opportunities in the EU

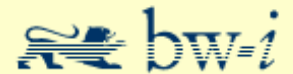


- The market is growing and will increase further
- High quality, high-tech products are particularly in demand
- There is room for new market entrants among the wide range of specialized producers
- EU norms and standards are not a hurdle, but an opportunity to serve an ever-expanding market



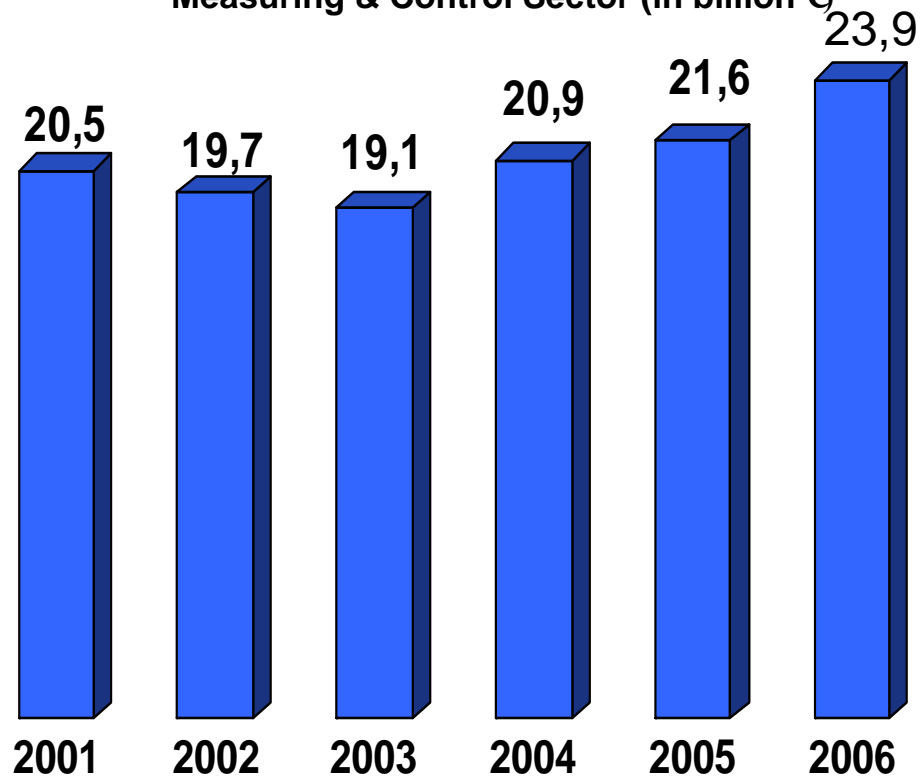
Baden-Württemberg

Baden-Württemberg International



Stable Growth of German Measuring & Control Technology

Sales of German Manufacturers in the
Measuring & Control Sector (in billion €)



In 2006 total sales of German manufacturers amounted to € 23.88 billion.

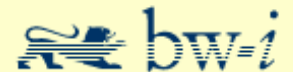
From 2005 to 2006 sales per employee grew from € 148 100 by an average of 9,4% per year - evidence of the steady increase in productivity.

Source: Association of Precision Engineering and Optics Manufacturers, figures from 2006



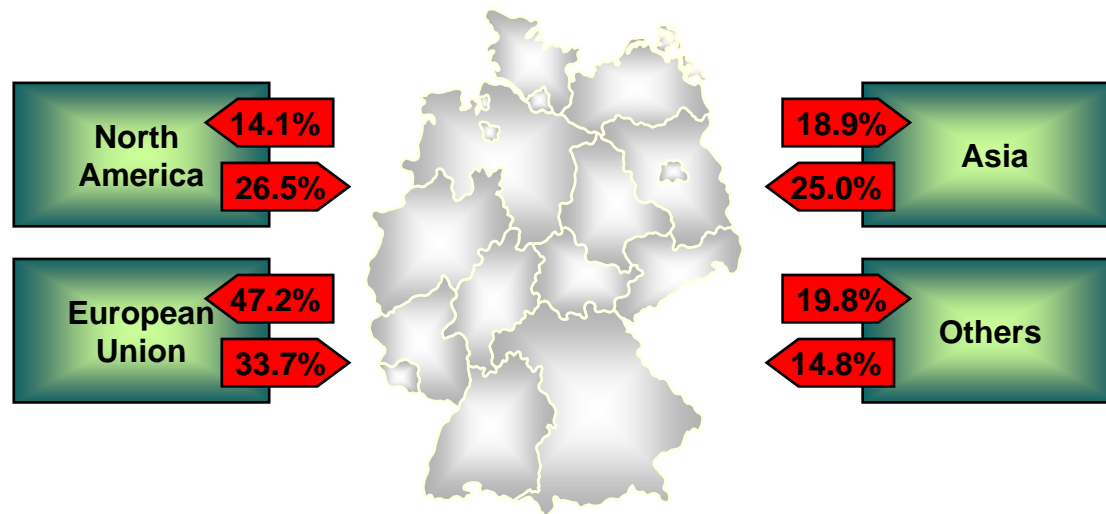
Baden-Württemberg

Baden-Württemberg International



Germany – An important Global Trade Partner

Germany's trade flows in Measuring & Control Equipment
in % of total Imports/Exports in this Sector



Export sales amounted to € 13.96 bn. The other EU countries and Asia are the most important export markets.

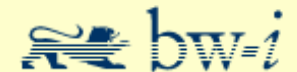
Exports to the „Rest of the world“ have increased significantly, evidence of the continuing globalization in this sector.

Source: Association of Precision Engineering and Optics Manufacturers, figures from 2006



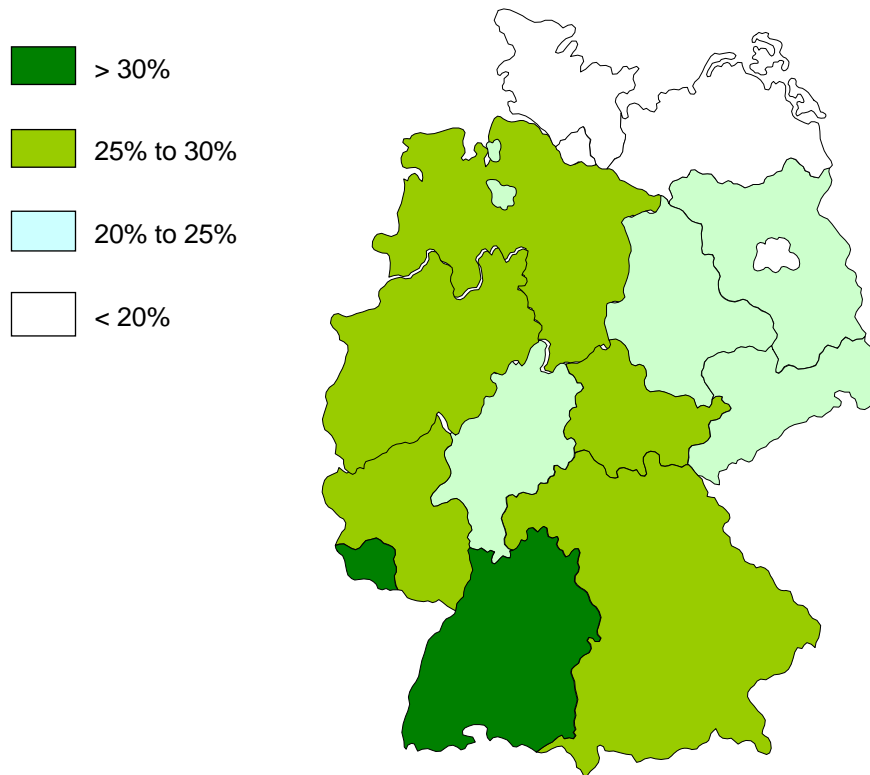
Baden-Württemberg

Baden-Württemberg International



Baden-Württemberg – Germany's most industrialised State

The Manufacturing Industry's Share of National Economy (in%)



Source: German Federal Statistics Office

The measuring and control industry draws on all the high-tech skills of the modern age: mechanical engineering, electronics, vehicle construction, precision machinery and optics – and needs high-quality suppliers.

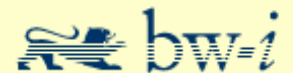
Within Germany, 22% of the companies in these sectors are in Baden-Württemberg.

With its industrial density and dedication to quality, Baden-Württemberg is the ideal location for companies in the measuring & control equipment market.

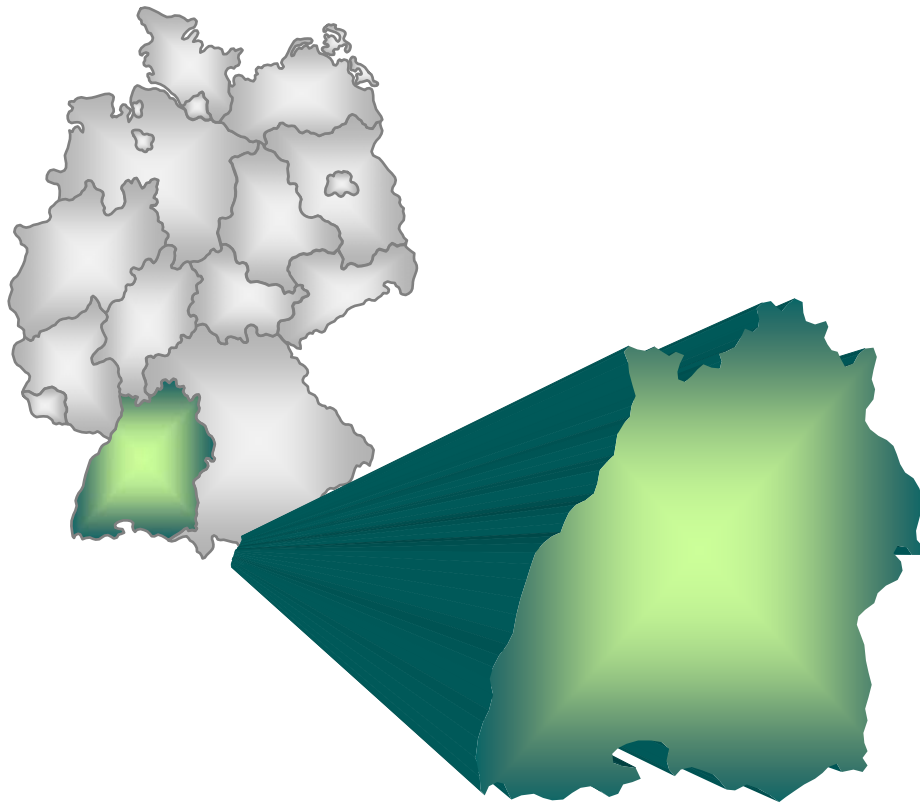


Baden-Württemberg

Baden-Württemberg International



Measuring & Control Technology in Baden-Württemberg



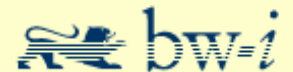
There are about 403 600 companies in the EU in five important sectors of industry: electronic engineering, mechanical engineering, motor vehicle construction and parts, precision instruments, optics and office machines, about 50 000 of these are in Germany.

Within Germany, 22 % of the companies in these sectors are in Baden-Württemberg.

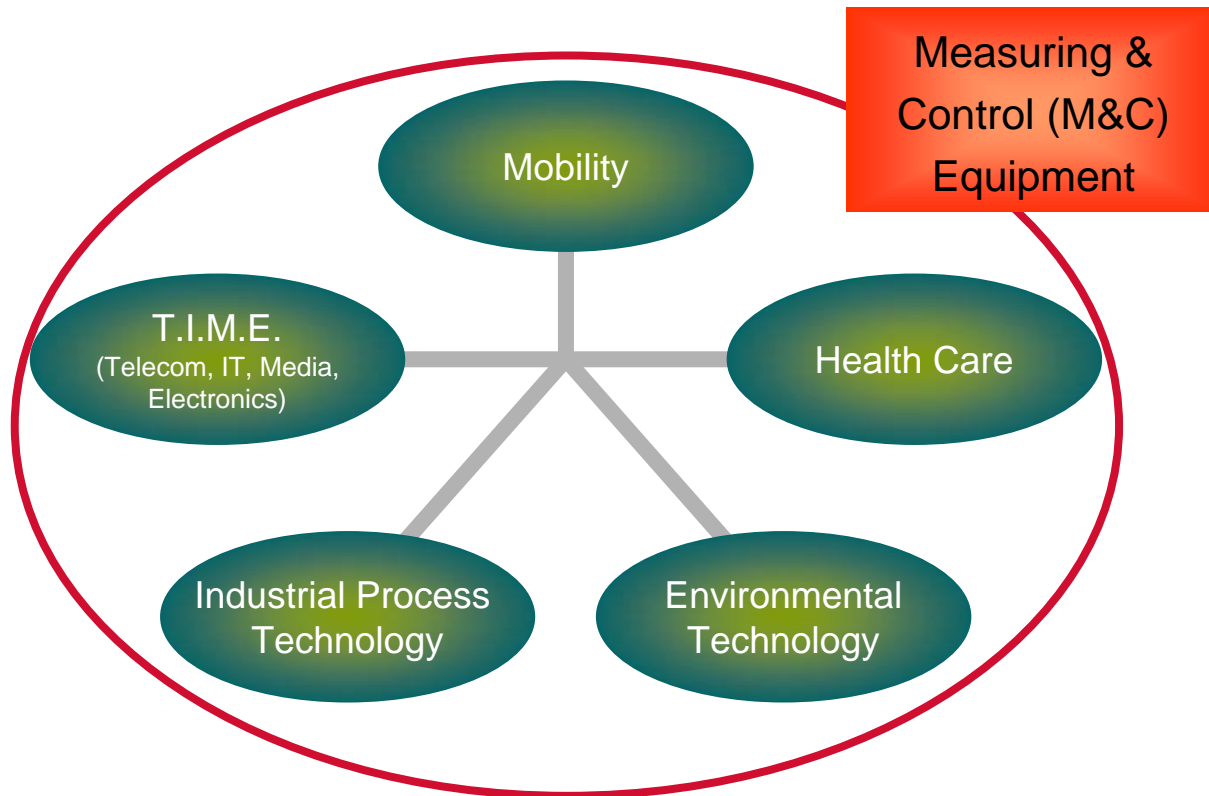


Baden-Württemberg

Baden-Württemberg International



Measuring & Control Technology in Baden-Württemberg



The Measuring & Control Equipment Industry is an important supplier to all of the 5 most important cluster industries in Baden-Württemberg.

In Baden-Württemberg, all relevant industries are present in great density – one of the few regions worldwide that offers this advantage.

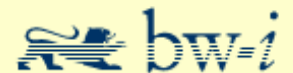


Companies

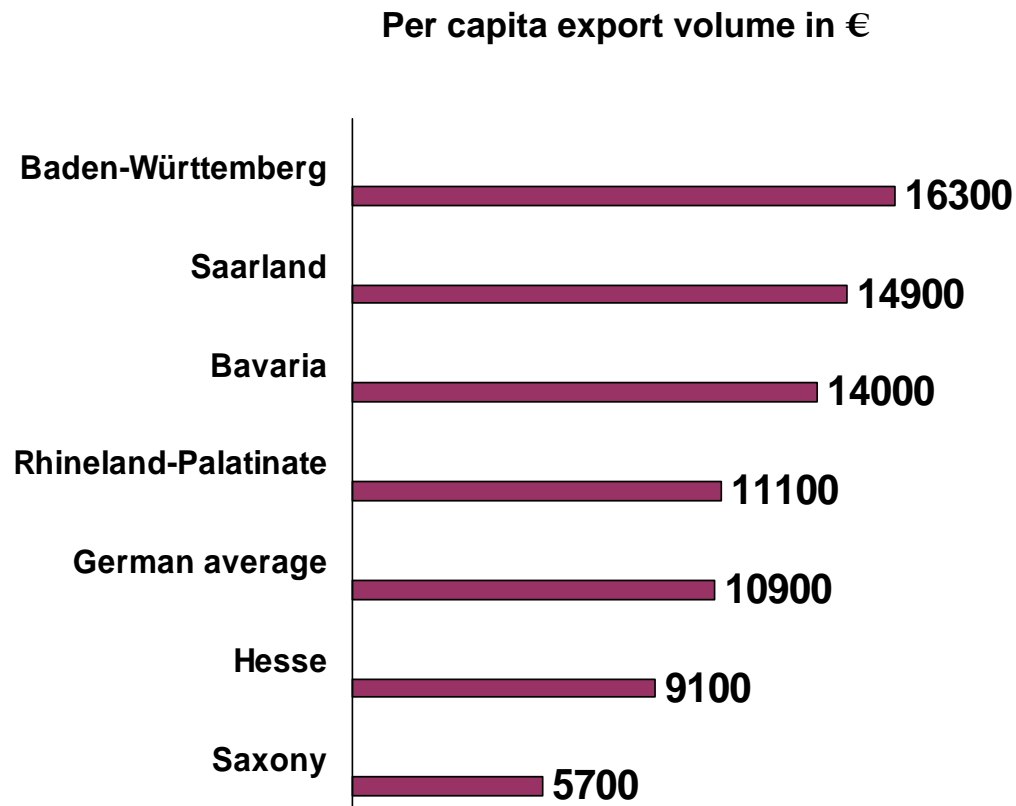


Baden-Württemberg

Baden-Württemberg International



Baden-Württemberg – One of the World's leading Exporters



Baden-Württemberg accounts for only 0.17% of the world's population and for an impressive 1.8% of total world exports. This is 15,7% of total German exports.

Baden-Württemberg yearly exports € 175 billion worth of goods (2006). With a per capita export volume of € 11502 Baden-Württemberg outstrides all other German States.

Exports account for more than 52% of the State's GDP, making Baden-Württemberg Germany's No. 1 exporter.

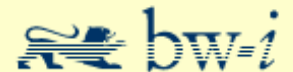
2006 figures

Sources: German Federal Statistics Office

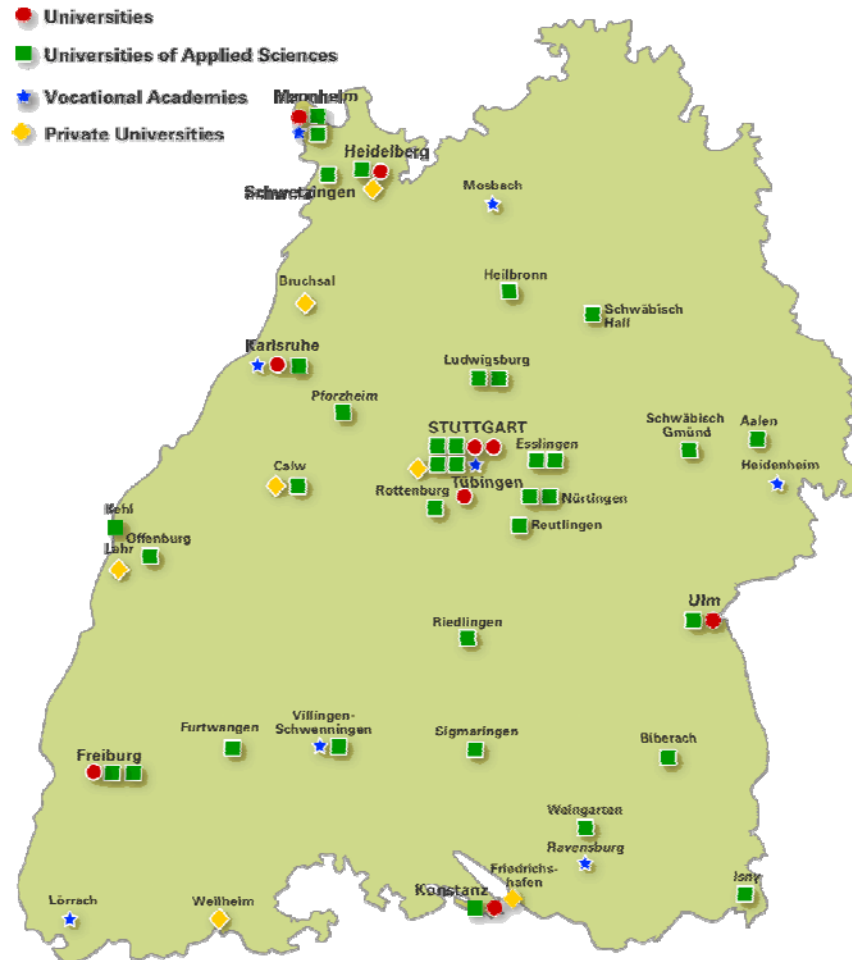


Baden-Württemberg

Baden-Württemberg International



Baden-Württemberg – An excellent structure for higher education



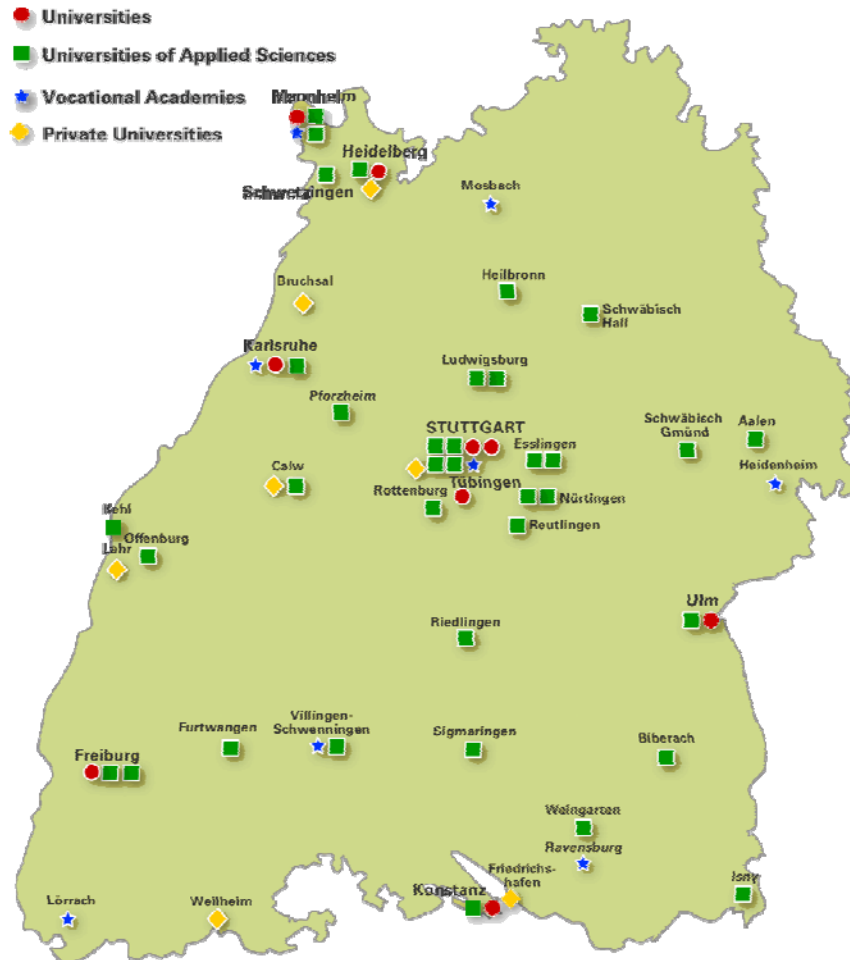
Baden-Württemberg has the most densest and the most modern structure of Universities and Academies for higher education, including

- 9 Universities
- 36 Universities of Applied Sciences
- 6 Universities of Education
- 8 Universities of Arts
- 8 Vocational Academies
- 7 Private Universities

A network of technology transfer centers provides the bridge between private industry and research institutes and guarantees rapid access to new results.



Baden-Württemberg – A highly developed Research Infrastructure



Baden-Württemberg has the most densest and the most modern structure of Universities and Academies for higher education, including

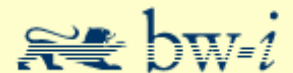
- 9 Universities
- 37 Universities of Applied Sciences
- 6 Universities of Education
- 9 Universities of Arts
- 9 Vocational Academies
- 7 Private Universities

A network of technology transfer centers provides the bridge between private industry and research institutes and guarantees rapid access to new results.



Baden-Württemberg

Baden-Württemberg International



Baden-Württemberg – Good access to the East and the West

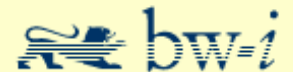


Distance	in km	flight time
Athens	1677	3hrs/40
Berlin	512	1hr/10
Brussels	416	1hr/5
Budapest	749	1hr/20
Copenhagen	802	1hr/40
Helsinki	1621	2hrs/40
Istanbul	1776	4hrs
Lisbon	1841	2hrs/10
London	727	1hr/50
Madrid	1378	2hrs/20
Milan	369	1hr/5
Moscow	2067	5hrs/10
Paris	502	1hr/20
Prague	408	1hr
Rome	808	1hr/35



Baden-Württemberg

Baden-Württemberg International



Baden-Württemberg Facts & Figures

Population	10.7 million inhabitants
Gross domestic product (GDP)	Euro 353 billion
Expenditure on R&D	Euro 13.7 billion = 4,2% of the State's GDP
Patent applications per year	> 13 638 = 28,5% of German total
Number of manufacturing plants (with more than 50 employees)	4 500
Export quota (manufactured products)	51 %
Value of exports	Euro 150 billion = 1.8 % of the World's exports
Research facilities	> 100 major research institutes
University, technical and vocational college students	242 938



Baden-Württemberg

Baden-Württemberg International



Services provided by Baden-Württemberg International

Baden-Württemberg International is your central port of call if you are looking for a location or a Baden-Württemberg partner with whom to establish fruitful business relations. Our range of services includes:

When you are looking for an industrial location:

- Information on Baden-Württemberg and on individual industrial sites.
- Consulting on government subsidies and programs.
- Assistance with all contacts to authorities, including permit procedures.
- Support in the search for suppliers and the selection of service companies.

When you are looking for cooperation partners:

- Information on market potential and market specifics.
- Planning of information visits, including appointment scheduling.
- Identification of potential partners that meet your specific demands.
- Assistance with trade fair activities in Baden-Württemberg.

Baden-Württemberg International
Willi Bleicher Strasse 19, D -70174 Stuttgart
Phone: ++49-711-2 27 870 • Fax: ++49 711 2 27 87 22
Internet: www.bw-invest.de • E-Mail: info@bw-i.de



Baden-Württemberg

Baden-Württemberg International The logo for Baden-Württemberg International, consisting of a stylized blue and white graphic followed by the lowercase letters 'bw-i'.