

# WHICH REGION IS THE GATEWAY TO EUROPE'S IOT MARKET? IT'S BAVARIA, GERMANY.



Don't take it from us, take it from unbiased observers:

EU Study mapping IT activity: **Bavaria is the European #1**

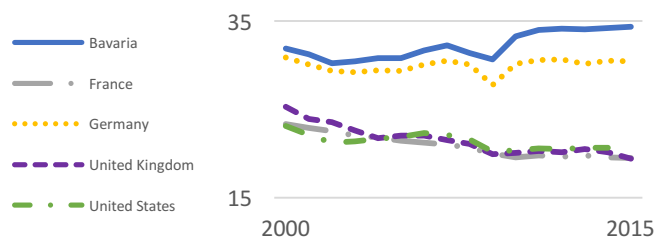
Incoming companies: **"Bavaria is Global #1 for Industrial IoT"**

## HOW DID WE GET THERE?

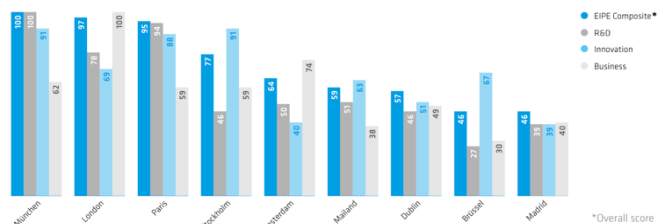
The backbone of the Bavarian economy are globally known exporting industrial corporations and SMEs (see below). Through these global leaders, Bavaria has nurtured and refined its position as the **developed world's current top manufacturing location.**

In parallel, Bavaria has developed a continental lead in digital due to **unique strengths**: Top universities and research facilities; close collaboration between business and academia; high quality of life.

Industry, Value Added (% of GDP)



#1 with a perfect score of 100 pts from EIPE (European ICT Poles of Excellence)



SOME of the globally recognized brands from Bavaria are:



## RECENT IOT DEVELOPMENTS & INVESTMENTS

- 2014: GE Research European HQ in Bavaria celebrate 10<sup>th</sup> anniversary
- 2014: Intel opens IoT Ignition Lab, announces its expansion one year later
- 2015: IBM chooses Bavaria to house global Watson IoT headquarters, creating 1,000 jobs
- 2015: VW, German carmaker from outside of Bavaria, opens its 1st Data Lab in – Bavaria
- 2015: Bavarian Adidas launches its first automated 'Speedfactory' in Bavaria
- 2016: Huawei launches Openlab to foster innovation in IoT with 25 industry partners
- 2016: Kii, the leading IoT cloud platform, sets up in Bavaria
- 2016: Google moves into its new centralized Bavarian campus
- 2016: Microsoft inaugurates its new German 280,000 ft<sup>2</sup> headquarters in Bavaria
- 2017: SAP launches its IoT Analytics brand Leonardo with a lab in Bavaria
- 2017: Cisco expands its Bavarian presence with new German headquarters
- 2017: Bavarian entrepreneurial center UnternehmerTUM receives federal status as Germany's chosen Digital Hub for mobility – German efforts will be bundled here
- 2017: Germany overtakes UK as most active European commercial property market

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*“Berlin might be nice to start with in Germany. However, if you wish to do **serious business**, you have to set up in Munich.”*

– Dr. Wieland Holfeder, Site Lead, **Google Germany GmbH**

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*“We could have put [the Watson IoT Headquarters] any place in the world, and most places in the world wanted [it]. But we felt there was a very **unique combination of industrial sector participants** [in Bavaria]. A lot of our [partners] are right from this neighbourhood. But also, there's **tremendous technical expertise, tremendous universities, tremendous infrastructure and a government which is very friendly towards business** [and] **investment**. So we decided that [...] we would put [it] here. And it's the first time we're bringing Watson [...] outside the United States, [so this is] a huge step for us to make, but we have complete confidence that with the help of our partners, the government here, the university system, we will be hugely successful.”*

– Dr. John E. Kelly III, Senior VP, **IBM Solutions Portfolio and Research**

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*“Bavaria is a great location **for many reasons**. [...] What I tell people when they come to see us in Garching and say 'What is [...] one of the biggest advantages?', is: If I need to get in touch in personal dialogue with someone who is a **world leader in their respective industries** – [ranging] from automotive, to industry automation, to chemical industry, to **whatnot** – it typically takes me a 30-60 minutes' drive. [...] If you're in the innovation game, proximity matters a great deal. [...] So in my view, one of the biggest advantages here in Bavaria is that you have so many leading companies, in a variety of industries, so that **it's easy to connect** [...]. [In addition to the corporations,] there are also many mid-sized companies across the state, that offer either great services to us or might be partners for research consortia. It is essential that you are in touch with a broad variety of experts in various fields. [...] That is why you want to be located in a **hotbed of innovation and research and advanced technology**, that Bavaria truly is.”*

*“**Bavaria has a great pool of talents**. That's partly thanks to the industry in Bavaria that attracts people from outside the state as well, but it's also thanks to its great universities. [They] are leaders in academic research, and in educating top, top people – nationwide [...]. You might even go on a global scale and say that you wouldn't find many universities like the ones in Bavaria that have the same level of quality in the education of young engineers. [...]*

*The third element I've mentioned is you want to be sitting somewhere where it is easy to attract people, and to retain people. [...] **Bavaria is a great place to live**. It's in the heart of Europe. It has to offer lots of value outside of your daily job.”*

– Dr. Carlos Härtel, CEO, **GE Germany & GE European Research Center**

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