



Niedersachsen

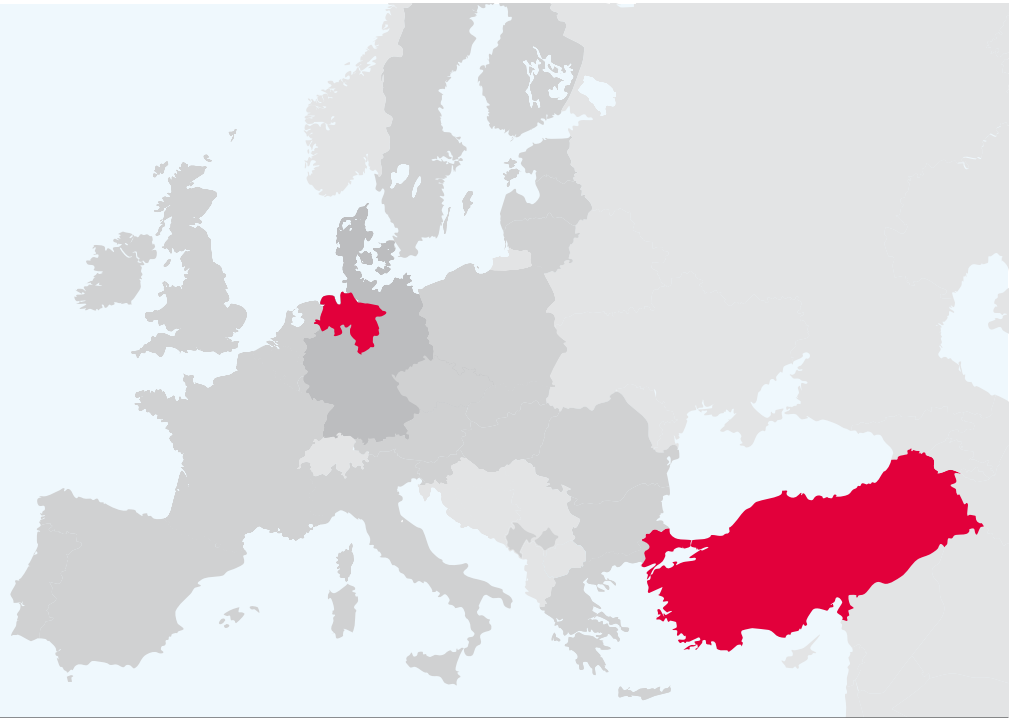
German for Business.

Heading for the Future

Perspectives for Turkey and Niedersachsen



Türk-Alman Business Center · www.tabc-niedersachsen.de



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Welcome to Europe, welcome to Niedersachsen!

This Federal State in the north of Germany provides Turkish companies with superlative access to European markets. Its geographical position in Europe and sustainably developed infrastructure make it a first-class European location.

Niedersachsen-based global players and innovative medium-sized companies provide inspiration and momentum in the energy, mobility, mechanical engineering, tourism and healthcare/life sciences sectors—in Germany and throughout the world. Niedersachsen provides companies that want to expand in Europe with a uniquely positive business environment.

Globally aware businesspeople and tailor-made programmes enable you to identify and exploit successful, long-term business development opportunities in Niedersachsen. Why not use Hannover's international trade fair platforms to enter into dialogue with potential partners and use the range of services provided by the newly established "taBC — Türk-Alman Business Center. 🇹🇷🇩🇪

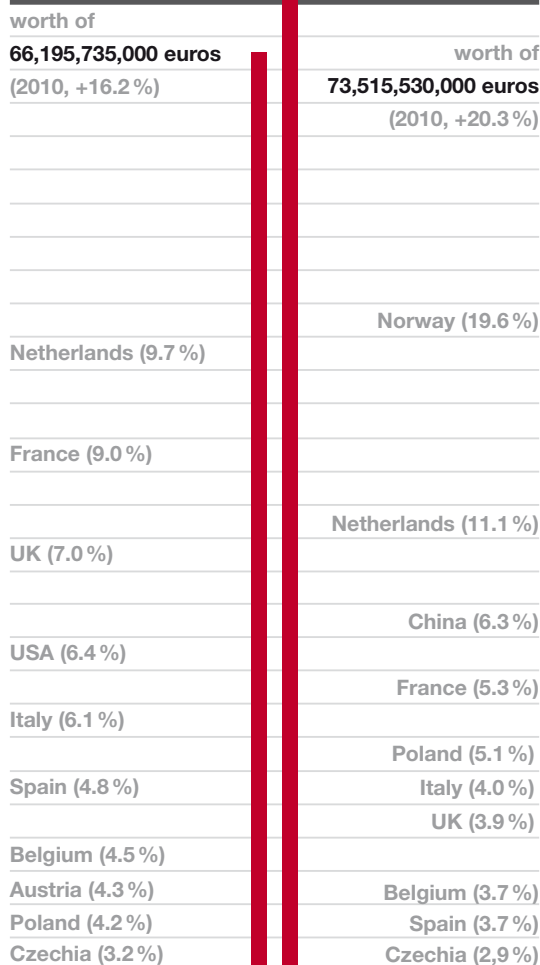
“Niedersachsen attaches enormous importance to internationalization. It is one of the main focuses of our economic policy. At a time of globalization, Niedersachsen is in competition with every region of the world.”

David McAllister,
Prime Minister of Niedersachsen



Photo: Niedersachsen State Chancellery

Exports Imports



And the most important trade partners (shares/2009)

The reunification of Germany and the process of European enlargement have transformed Niedersachsen into a business hub serving the entire continent. This Federal State, with its well-developed road, rail, air and inland waterway infrastructure, is located on major transport routes. This is where continental north-south links intersect with east-west rail, motorway and inland waterway trunk routes. Given its nine sea ports and its close proximity to Bremen, Bremerhaven and Hamburg, Niedersachsen now has a sea port density that is unrivalled in Europe.

Niedersachsen: a Major European Hub

Niedersachsen's economy is to a large extent integrated into the wider European economy. Its economic performance within Germany makes Niedersachsen one of the engines of this new export-driven growth, which Germany is using to provide stability in Europe following the global economic crisis. Niedersachsen has indisputably become an initiator of technological advances in the energy and mobility sectors as well as of Germany's sustained export growth.

The substantial volume of trade that Niedersachsen conducts with its European neighbours not only demonstrates how closely interlinked the entire European Economic Area is. Close trading ties, particularly with Niedersachsen's immediate European neighbours, Netherlands, UK, Denmark and Poland, represent a major opportunity. The figures are based on close personal relationships and networks that have been built up over decades, from which you as a Turkish company can benefit.

And not only in Europe—the State's targeted foreign trade policy that focuses long-term on internationalization has enabled Niedersachsen's economy—including its medium-sized businesses in particular—to exploit new growth potential outside of Europe in global growth markets. Why not take advantage of the full potential of this premier international business location that is closely integrated with Europe and focuses on global markets. 🌐



Photo: Volkswagen

Where Global Players Feel at Home

Niedersachsen's economically important medium-sized business sector provides companies from Turkey that want to do more business in Europe with attractive prospects for cooperation and growth. Around 290,000 companies are based in Niedersachsen. 99.8 percent of these companies are small- and medium-sized businesses, most of which are owner- and family-run. This is an enterprise culture in which quick decisions, flexibility and the personal relationships maintained by businesspeople count for a great deal. As a Turkish businessperson you will feel right at home in Niedersachsen. 🇹🇷

Volkswagen, TUI, Continental, EWE, Rossmann and many other companies of global renown are based in Niedersachsen. Here you will find giants of the automotive, shipbuilding and food industries as well as major media, service sector, healthcare and biotechnology companies.

Niedersachsen's technology champions are ideal partners to assist you with your expansion plans. In their role as customers, who require you as a supplier to provide world-class solutions, they are able to secure new, long-term prospects for you—including in global growth markets, where you also wish to do business. You can find many examples of projects executed by these global players in China, India, Brazil and Russia as well as in the Gulf—and in Turkey.

Enterprises (2009)

214 billion euros GDP; 3,662,400 employees

202,397,700,000 euros: turnover of the 10 biggest companies

Volkswagen		113.8 bn euros
TUI		24,9 bn euros
Continental		24,2 bn euros
Salzgitter		12.5 bn euros
Agravis		5.8 bn euros
EWE		5.5 bn euros
MGL		5.0 bn euros
E.ON Avacon		3.8 bn euros
hagebau		3.7 bn euros
Georgsmarienhütte		3.3 bn euros



Photo: alpha ventus



Photo: Bard

A Leading Role in the Energy Revolution

Niedersachsen is a powerhouse — in providing Germany with security of supply. It has its eye on the future and on sustainability. This applies equally to its deposits of natural resources—90 percent of the natural gas produced in Germany is produced here—and to production and distribution. 18 major conventional power stations are in operation throughout the state. To this you also need to add the large number of smaller plants that generate power from regenerative sources.

Business networks and research institutes have pooled their resources to create a renewable energies cluster, focusing on wind power in particular, which is unique in Europe. State-of-the-art wind power plants are designed and manufactured in Niedersachsen and exported all over the world. Niedersachsen-based global players, such as Enercon, GE Wind Energie and the Bard Group, are wind power pioneers and global market leaders.

Niedersachsen has become Germany's leading wind power location. Over 40 percent of all wind power plants in Germany are manufactured here. 5000 direct and several thousand indirect jobs in Niedersachsen are dependent on how the wind power sector performs and develops. Bordering the North Sea and featuring a large area of non-urbanized land,

94 %
of Germany's
natural gas is found in
Niedersachsen

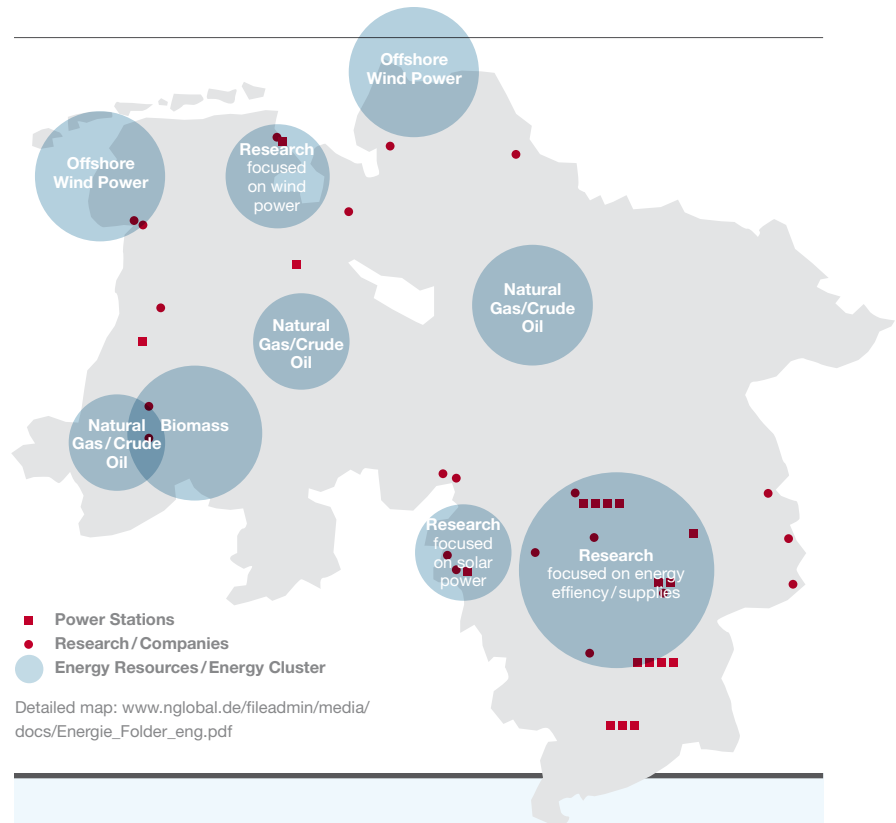


Photo: Baker Hughes

5,365
wind turbines in
Niedersachsen

Niedersachsen has optimum locational advantages in relation to the increased use of offshore wind power. The scheduled major expansion of the Alpha Ventus offshore project will boost economic growth in Niedersachsen's coastal regions considerably. The major energy providers, such as E.ON, RWE, Vattenfall and Niedersachsen-based EWE are investing massive amounts of money in upgrading Niedersachsen's energy infrastructure. That generates opportunities for companies that operate along the entire power generation and distribution value-added chain. That also applies to plant engineering and construction - Niedersachsen is a forward-looking manufacturing location for generators, transformers and electricity distribution systems.

A wide range of companies from here are already competing very successfully in international markets. If you are actively involved in the energy sector, you won't find a comparable concentration of skills and future prospects anywhere else in Europe. 🚀



230,000 ha had been used to plant energy crops – equivalent to 8.8 percent of the total agricultural land



Photo: Meyer Werft



Photo: Meyer Werft

Niedersachsen Gets the World Moving

The automotive industry is the most important sector of Niedersachsen's economy. Production facilities for limousines, convertibles, off-road vehicles, trucks and buses are located in Emden, Hanover, Osnabrück, Salzgitter and Wolfsburg.

The name Volkswagen is synonymous with international competitiveness. The Group's presence in global growth markets provides new international perspectives for the automotive supplier industry operating along the entire vehicle manufacturing value-added chain. The one million vehicles that come off the production lines in Niedersachsen every year illustrate how forward-looking the state's vehicle manufacturing industry is.

Major automotive suppliers such as Conti, Varta and WABCO make Niedersachsen one of the top locations in the globally integrated automotive business. In particular the south-east region of Niedersachsen, incorporating the cities of Braunschweig and Salzgitter and the VW City of Wolfsburg features a significant concentration of skills and is therefore one of the world's most competitive automotive regions.

Niedersachsen's engineers and research scientists play a leading role in the development of green or sustainable mobility concepts and technologies. Niedersachsen's automotive sector employs a total of around 145,000 people. The sector's proactive approach to innovation is supported by the activities of well-known research institutes, particularly in the fields of production engineering or modes-of-transport-related technologies. Other research institutions in Niedersachsen focus on mobility, or put more accurately, telematics — an attractive environment for any company from the mobility sector.

Yet it's not just cars and commercial vehicles that are manufactured in Niedersachsen. State-of-the-art trains, trams, aerospace components and luxury liners are made here too. The railway vehicle, aircraft and shipbuilding segments are also firmly embedded in this Federal State in the north of Germany.

Niedersachsen can provide companies that develop solutions for mobility in the future with the necessary integrated infrastructure. We give your international plans the required momentum. 🚀



Photo: VW

145.000

people in Niedersachsen employed in the automotive industry.



Mechanical Engineering: Technology Skills and International Partnerships



Photo: Leibniz Universität Hannover

Knowledge (2008) 11 Universities,
7 Technical colleges, 5 Private technical colleges, 140,000 Students,
16,000 Foreign students, 34,000 Employees at universities,
1,500 Cooperations with foreign, partner universities,
1,755 Billion euros budget, 7 Max-Planck Institutes,
3 Fraunhofer Institutes, 120 Other extra-university research facilities

The mechanical and plant engineering sector in Niedersachsen incorporates some 480 companies, employing more than 60,000 people. Figures released by the German Engineering Federation (VDMA) and Niedersachsen's State Statistics Office show that this primarily medium-sized business sector is very active in foreign markets. Around half of annual sales, worth approximately EUR 12 billion, are generated abroad.

Know-how from Niedersachsen is also in demand from emergent industrial countries, such as China, Russia and India. Those companies that are able to serve customers worldwide are skilled at establishing partnerships at locations in their home markets. Their power to innovate and their competitiveness make Niedersachsen's companies prized partners on high-tech projects—for instance special-purpose machinery, services and system solutions. Companies based here work closely with universities and research institutions in Niedersachsen. For example a large number of industrial and technology companies are working together under one roof on industrial process solutions at the Hannover Centre for Production Technology (PZH), which has an area of more than 20,000 m². Your European perspective is to locate and to form integrated networks in the place where our sustainable future is being developed. 🌱



Photo: PZH

Niedersachsen as an ICT Market: Innovation and Modern Services



Photo: Cebit

The fact that Niedersachsen's economy is multifaceted represents an opportunity for a service-focused ICT industry. Innovative solutions are not only required in a continuously modernising manufacturing industry but also in the service sector. This is where more than 70 percent of the working population work and they generate two-thirds of gross value-added. More than 10,000 companies employing around 60,000 people in Niedersachsen's ICT industry generate revenues of around EUR 8 billion.

The state capital, Hannover, has evolved to become one of Germany's most dynamic ICT locations. Niedersachsen launched its "ikn2020" initiative to specifically enhance and promote its innovation capabilities. As part of this initiative, the eight ICT regions in Niedersachsen, Braunschweig, Emsland, Göttingen, Hannover, Hildesheim, Lüneburg, Oldenburg and Osnabrück, have teamed up to jointly exploit growth potential.

The global ICT platform, CeBIT, is a showcase for the global market in solutions that enable administrative,



Photo: Cebit

production, marketing and customer service costs to be reduced and new potential to be exploited. Hundreds of thousands of people from all over the world beat a path to Hannover at trade fair time. You as an ICT company in Niedersachsen can benefit from this interaction.

Niedersachsen provides companies from Turkey, which have know-how and resources at their disposal, with plenty of business opportunities—in 2011, when Turkey is acting as Partner Country at CeBIT, and beyond. 🇹🇷



Photo: Gartenbauzentrale Papenburg



Photo: istockphoto

Food in Niedersachsen: Opportunities Along the Entire Value-added Chain

772,858

milk cows

1 in 2

chicken produced
in Germany comes from
Niedersachsen

The food industry, which generates annual revenues of well over EUR 20 billion and employs more than 100,000 people, is the second most important sector of Niedersachsen's economy, behind vehicle manufacturing. A large number of manufacturers of branded products—from Bahlsen to Wiesenhof—are based in Niedersachsen. These global players combine their long-standing traditions of producing premium-quality foods with cutting-edge production processes and smart marketing strategies.

Niedersachsen is Germany's top agricultural location and therefore meets all the requirements for manufacturing premium food products locally, based on integrated value-added chains. This sector is dynamic. It needs to generate solutions to address new trends, such as functional, bio and convenience foods as well as solutions for the price-sensitive German market and an effective response to competition from global corporations.

43,772

tons of fish, crabs
and clams were caught
in 2009

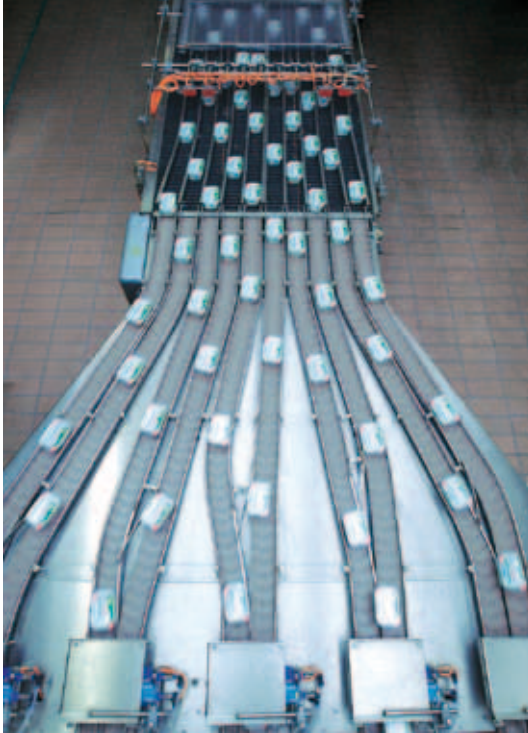
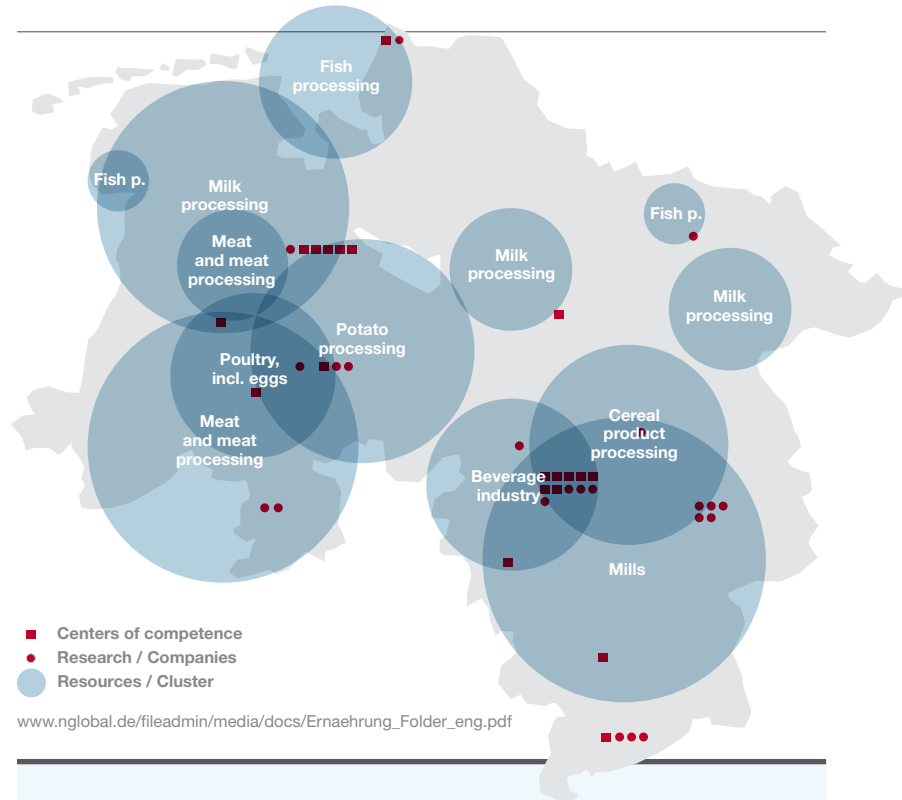


Photo: Nordmilch

Companies from Niedersachsen's food industry are not left to their own devices in this high-tech business, which features the highest standards of product and process safety. Specialist research and educational establishments, marketing organisations, skills and technology centres and partnership models along the entire value-added chain enable Niedersachsen to provide a know-how cluster that generates key competitive advantages when penetrating international markets. ↗



1 in 2 potatoes produced in Germany were grown and harvested in fields in Niedersachsen. **1 in 3** of raspberry crops and nearly **two thirds** of Germany's bilberry production are based in Niedersachsen. **21 mills** grind 500 tons a year. **6.2 million tons** of sugar beet crop.



Photo: Bodo Kremmin/Rebirth

Life Sciences, Health Sector: Life is the Future

Niedersachsen provides companies from the life sciences and health sector with outstanding opportunities to develop their businesses. The large number of universities and universities of applied sciences (17) plus non-university research organisations (28), from which new biotechnology firms are spun off every year, constitute a key locational advantage. These companies will discover excellent growth opportunities at Niedersachsen's six business start-up and biotechnology parks.

Niedersachsen, where around 250 life science companies employing more than 10,000 people are based, is one of Germany's leading life science locations. Experts work together in interdisciplinary teams in a wide range of issue-specific networks. BioRegionN, the state's health sector "Life Sciences Niedersachsen" initiative coordinates the life sciences network in Niedersachsen.

Research focuses on infectious diseases, neurobiology and regenerative biology. Niedersachsen has also acquired further key skills in biomedical and hearing aid technologies.

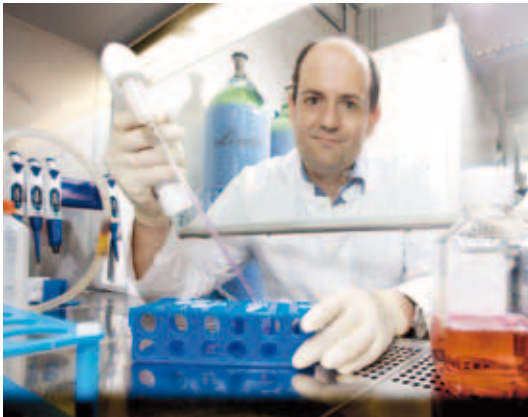
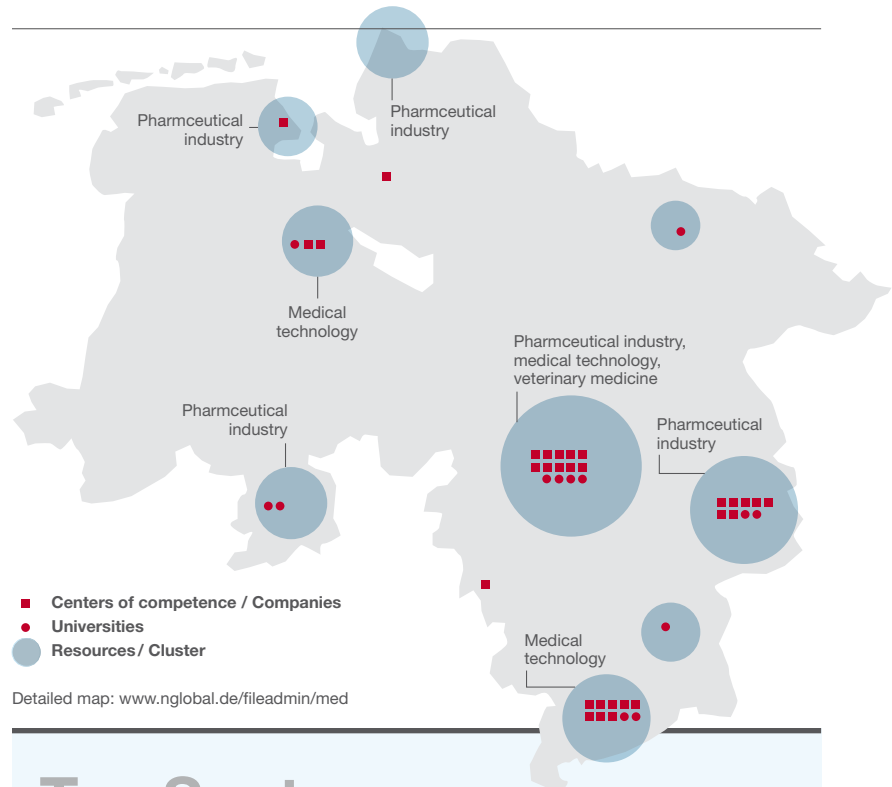


Photo: Bodo Kremmin/Rebirth

The “From Regenerative Biology to Reconstructive Therapy” excellence cluster and the postgraduate “Hannover Biomedical Research School” were amongst the Federal and States’ Excellence Initiative’s winners, whilst the University of Göttingen has joined the elite university ranks. The health sector is one of the most promising industries of the future. It includes not only healthcare provision and healthcare services but also wellness, health tourism, e-health and medical technology. In Niedersachsen one in nine of the working population is employed in the health sector.

Partnerships with businesses in Niedersachsen provide companies and organisations from Turkey, which already have resources in place in these segments, with opportunities to conduct joint projects. ✈



Top Spots

Medical Park Hannover, www.medicalparkhannover.de

BioTec Gründerzentrum, Braunschweig, www.biotech-bs.de

Science Park, Göttingen, www.gwg-online.de

Biotechnologie Zentrum, Wilhelmshaven, www.biosphere-ag.de

Technisches Innovationszentrum Wolfenbüttel, www.tiw-wf.de

Niedersachsen and Turkey: Perspectives in Europe

**Foreign trade
Niedersachsen 2010
(in Euros)**

944 m.

Exports to Turkey

817 m.

Imports from Turkey

Relations between Niedersachsen and Turkey, at a business and political level, are both multi-tiered and cordial and have been proactively fostered and enhanced over the course of many years. Turkey's economy is booming and Germany has been its most important trading partner for years. In 2009 the volume of bilateral trade amounted to approx. EUR 19.8 billion, whilst trade between Niedersachsen and Turkey amounted to around EUR 1.48 billion. Dynamic growth in Turkey provides both global players and German medium-sized businesses with tangible sales and partnership opportunities. In this respect the fo-

cus is on the automotive, infrastructural upgrade (including logistics), alternative energies, environmental protection, tourism, ICT and service sectors.

The Turkish market absorbs many high-quality products from Niedersachsen: power generation equipment, cars and motor homes, plastics, and machinery constitute a significant portion of exports from Niedersachsen. Imports are dominated by clothing, buses, automotive components and cotton. Tourism contributes its fair share to this good relationship.

Niedersachsen's tourism giant TUI has operated successfully for many years in Turkey's attractive holiday destinations. And there are good reasons for this: Turkey has rapidly overcome the impact of the global economic crisis.

Niedersachsen cultivates relationships: delegations—such as the one headed by the Minister for Economics, Labour and Transport, Jörg Bode, last May—explore new business opportunities. Those businesspeople setting out from Hannover to Istanbul, Ankara or Izmir are mainly made up of business leaders, who know Turkey exceptionally well and have excellent contacts within the country. German companies with a great deal of experience and market success in Turkey as well as successful businesspeople of Turkish origin: both, for their part, motivate Turkish businessmen to consider Niedersachsen as their location for accessing the European market.

The Federal State of Niedersachsen is using the platform provided by Hannover Messe, the world's largest industrial trade fair, to establish new business leads in international growth markets. The 8th Niedersachsen Foreign Trade Day 2011 is to focus on Turkey. 🇹🇷



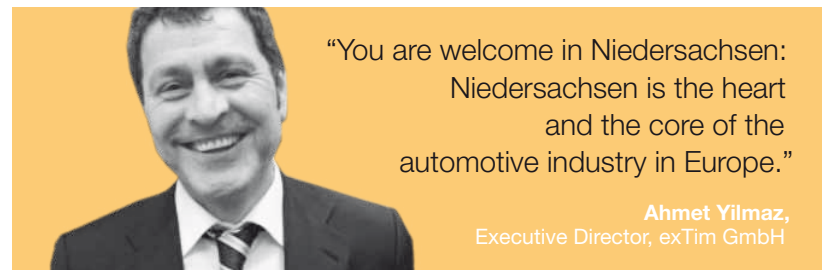
Photo: Niedersächsisches Ministerium für Wirtschaft, Arbeit und Verkehr

« Meeting with international partners at the exhibition centre here in Hannover is especially important to me. We look forward to seeing you there! »

Jörg Bode, Niedersachsen Minister for Economics, Labour and Transport

Trading relationships develop into personal relationships. Nowhere is this more apparent than in the business relationships that link Niedersachsen with Turkey.

Willkommen! Hoş geldiniz!



Trade Fairs 2011 Building Bridges

The role of trade fairs can hardly be overestimated in the fact that Niedersachsen has become known in Turkey. More and more Turkish exhibitors intend to gain global market access by way of the platforms offered by the Deutsche Messe, and not only in Hannover. Its subsidiary in Turkey has been expanding quickly and has become the dominating player in the Turkish trade fair market. Trade fairs such as WIN, CeBIT Bilisim, and the newcomer Renex are where companies from Niedersachsen meet new international customers.

In 2011 the trade fair city Hannover returns as a focus of interest to Turkey. The ambition with which Turkey

“The lack of qualified personnel is manifesting not only in the area of ICT but in many other industrial fields as well. I think that a collaborative bridge can be built between Germany and Turkey, not only in the area of information and communication technology but also in other industrial sectors.”

Dr. Murat Yalcintas, President Istanbul Chamber of Commerce (ICOC)



pursued its role in 2007 as an active partner country of the Hannover Messe was suggesting that Turkey will also want to make its mark in 2011, at the world leading ICT platform of CeBIT. 90 exhibitors, successfully organized again by Istanbul Chamber of Commerce showcased Turkey's ICT sector.

Turkey has evolved to become a market with high potential. CeBIT Bilisim fair in Istanbul, which has become the region's most important ICT event (attracting 180,000 visitors), demonstrate that this country, which boasts double-digit growth figures in the ICT sector, has enormous potential and is serving as hub to the entire Eurasian region.

Turkey is also the market to which the Niedersachsen Foreign Trade Forum at the Hannover Messe is dedicated. As an international forum, the event serves as a platform on which Turkey can present itself and its business strengths to an interested audience drawn from the areas of business, science and politics.

As the international trade fair in the Renewable Energies sector, Renex 2011 points out attractive investment opportunities and potentials in the areas of energy, efficiency and environment in the Southeast European economic area. Key topics will be: wind energy, solar systems, geothermal resources, water supply and disposal, recycling and environmental technologies, hot water production, and biofuel. In South East Europe, there is a particularly high need for investment in the energy sector.

As in previous years Niedersachsen will use the marketplaces created by Deutsche Messe, to step up dialogue with the more with Turkish entrepreneurs and their networks. 🌐

taBC

Türk-Alman Business Center

The newly established Türk-Alman Business Center (taBC), a joint initiative by NGlobal and hannoverimpuls, the state capital's business development agency, provides support to Turkish companies commencing business activities in Niedersachsen. It provides market entry, cooperation partner search and business location services from a single source. The taBC, which has already been introduced to Turkish companies at CeBIT in Hannover and at CeBIT Bilisim and RENEX in Istanbul as a first point of contact, can be contacted at CeBIT and HANNOVER MESSE 2011. ➔

Services at a Glance

Information

- › Facts and figures for decision-making – market data, sector-specific information, locational conditions
- › Proposals for suitable sites and commercial real estate
- › Information about costs (personnel, energy, rent etc.), tax regulations and relevant legal context

Consulting

- › Identification of market opportunities, competitor analyses, strategies for market entry

- › Individual advice on locations with project-specific offers
- › Advice on financing, business promotion schemes, and government grants and subsidies

Implementation

- › Brokering of contacts to banks, suppliers, partners
- › Coordination of application and approval procedures
- › Organisation of location visits
- › Assistance in finding the right personnel

Steps to Success

1. Get in touch with taBC

- a. company information/company profile
- b. project description (taBC provides information)

2. Setting up a personal meeting / investment workshop

- a. Project-specific information
- b. Meeting with experts
- c. Discussion of strategy (Aim: Agreement of market entry strategy)

3. Performing market entry

- a. Market analysis, finding potential cooperation partners: ProMAP
- b. Sales outsourcing: GemS
- c. Project-specific offer
- d. Finding suitable location
- e. Arrangement of site visits
- f. Identification of subsidies
- g. Accompanying talks and negotiations with financing institutions and local authorities
- h. Project coordination and founding process: legal information, visa formalities etc.



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