STAATSMINISTERIUM FÜR WIRTSCHAFT ARBEIT UND VERKEHR



Location of Saxony

in comparison with other regions 2016





Foreword

Saxony building on a solid economic foundation is well-equipped for the challenges ahead

On my travels in Saxony I often get into conversation with people telling me about those things which they consider so typical for this country. They talk about freedom, solidarity and the creative and imaginative inventive mind. I meet with entrepreneurs working today on products for tomorrow.

The past years were exciting and successful for Saxony. More than before we are doing well. Unemployment in Saxony is on a record low. Since 2010 the unemployment rate has dropped from 11.8 to currently 6.9 percent (September 2016) and fortunately this trend continues. In the last five years Saxony's economic power has risen by almost 9 percent. It is the third strongest growth of all German states behind Bavaria and Baden-Württemberg.

Saxony is a liberal-minded state, although I often wished this commitment expressed much louder by the people of the Free State. A large number of businesses successfully sell their innovative products and services abroad for years. A number of world market leaders are at home in Saxony. Since 2000 the share of exports in the gross domestic product has risen by almost 150 percent. In 2015 it went up by another 6.8 percent compared to the year before.

Innovative, competitive products in demand worldwide do not fall into someone's lap. It needs qualified and creative professionals, a versatile university and research landscape and above all, enterprises breaking new ground, acting across sectors and thinking out of the box. A recent exhibition at my ministry informed about a network dedicating to future textile solutions for health management and living for this approach. I could mention a lot more examples demonstrating impressively the potential and the inventive spirit in Saxony. For more information visit the website www.simply-saxony.com.

The positive development in many areas and the strength achieved form a solid foundation. We now need new impetus for what is ahead of us. Our living and working environment will be changing drastically in the next few years. To cope with the challenges of the future and shape it actively, we have to pool forces. Only together we can bring Saxony forward. Join it.

Yours

Martin Dulig Saxon State Minister for Economic Affairs, Labour and Transport



Martin Dulig



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1. Basic facts at a glance

Economic performance of Saxony on EU level

With a gross domestic product weighted according to purchasing power of 25,800 euro per inhabitant the Free State of Saxony has now reached 94 percent of the EU average thus ranking ahead of all central and eastern European states. Neighbouring Poland still lags behind with 68 percent and Czech Republic with 84 percent.

The migration of people from Saxony has been stopped lastingly. And so, for a second time in a row, there has been a growth in population in Saxony by plus 29,600 persons.

Highly competitive industry

Industry has made a significant contribution to the economic success of the Free State. The growth rate since 2010 is 15.4 percent (adjusted for price changes) which is clearly above the 12.1 percent achieved on national level in total. The industry gets major impetus for its competitiveness from a potent and attractive research landscape. Besides highly qualified professionals it is one of the most important locational factors and constitutes an essential prerequisite for a sustainable growth of the Saxon industry.

Substantial drop in unemployment, continuous job growth

The success in the economic development is also reflected by the job market. The unemployment rate has fallen since 2010 from 11.8 to 8.2 percent whereas in the new federal states the rate reduced from 12.0 to 9.2 percent only. The drop in unemployment is much stronger in Saxony than on national average. So, the unemployment rate in Saxony is about one third lower than on EU average.

Small and medium-sized businesses shape the local economy

The SME play a central role in the economy of Saxony. 58,300 craft businesses play a great part in the different branches of the manufacturing industry, building industry as well as trade and services. The density of craft businesses is exceptionally high in Saxony: with 14.3 businesses per 1,000 inhabitants it is clearly above the German average of 12.2 businesses per 1,000 inhabitants and ranks third among all German federal states.

Saxony's exports – from record to record

The share of exports in the gross domestic product has risen since 2000 by almost 150 percent. In 2015 the exports increased again by 6.8 percent compared to the year before. It came up to 38.3 billion euro thus topping the previous peak by about 2.4 billion euro. The imports, too, climbed to a new peak of 22.1 billion euro. Over 43 percent of all exports of the new non-city states originate from Saxony.

For the seventh time in a row China is number one among the buyer countries. About 28 percent of all Saxon exports go to Asia. Nevertheless, Europe remains the most important destination of Saxon exports with 54 percent. The trade with our direct neighbours, the Czech Republic as second most important trade partner and Poland in fourth place makes an important contribution.

Innovations from Saxony – substantial increase in patent applications

Research and development play a vital role for the future development of Saxony. Compared to other European countries Saxony is well-positioned already. The share of R&D spending in the GDP has risen by 12 percent from 2005 to 2014. At a share of 2.66 percent Saxony ranks seventh among all German federal states. Compared to the other new non-city states Saxony is by far holding a top position.

The success becomes obvious when looking at the development of patent applications. As against 2005 the number of applications increased by 10 percent per 10,000 inhabitants.

Efficient transport infrastructure – Foundation of a first-class economic structure

A well-developed transport infrastructure is a vital prerequisite for the mobility of people and the transport of goods. Measured in terms of area and number of inhabitants the density of the road network is clearly above the German average.

Sustainably successful – solid public finances and a high level of investments

Solid public finances are both a mirror of the economic power and an essential prerequisite for the future prospects of a business location. At an investment rate of 20.0 percent (2015) Saxony has been continuously spending a greater share of its funds for investments than other German federal states. The new non-city states (without Saxony) reach 13.3 percent whereas the old German noncity states invest not more than 8.3 percent. Compared to the other German federal states Saxony has an outstandingly low level of debt thus sets the right course for the future. It needs a sound budget management without new debt to maintain flexibility for current and future investments.

2. The Free State of Saxony at a glance

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Registration of brand new cars 2015Image: cars 2015as 1,000114.4per 1,000 inhabitants28Level of qualification of working population 2015 (%)Image: cars 2015	
as 1,000 114.4 per 1,000 inhabitants 28 Level of qualification of working population 2015 (%) 1	548
per 1,000 inhabitants 28 Level of qualification of working population 2015 (%) 6	2 200 0
Level of qualification of working population 2015 (%)	3,206.0
	39
with no formal vocational qualification 6.8	16.5
Apprenticeship, vocational school 56.6	51.4
Training as master craftsman, technician, college 17.0 University, university of applied sciences 19.6	11.2

Source: German Federal Office of Statistics, Statistical Office of the Free State of Saxony, "Regional Accounts of the Federal States" working group (as of July 2016), "Employment Statistics of the Federal States" working group (as of October 2016), Federal Employment Agency, own calculations

3. Saxony's position in Europe¹

				Unemplo	oyment rate ³	Gr	oss domestic proc	luct
	Area 2015		Employment rate ² 2015	2015	Change as against previous year	Per inhabitant (PPS) 2014 ⁴		Growth 2015/2014 (adj. f. price changes)
	1,000 km ²	million	0,	6	%-points	1,000	EU 28 = 100	%
Saxony	18.4	4.1	75.2	6.3	-0.9	25.8	94	1.5
Germany	357.4	82.2 ⁶	74.0	4.6	-0.4	34.5	126	1.7
France	633.2 ⁶	66.7 ⁵	63.7	10.4	0.1	29.3	107	1.3
United Kingdom	248.5	65.3 ^{5 6}	72.7	5.3	-0.8	29.9	109	2.2
Italy	302.1	60.7	56.3	11.9	-0.8	26.4	96	0.8
Spain	505.9	46.45	57.8	22.1	-2.3	25.0	91	3.25
The Netherlands	41.5	17.0	74.1	6.9	-0.5	35.9	131	2.05
Greece	132.0	10.856	50.8	24.9	-1.6	19.9	72	-0.25
Belgium	30.5	11.3	61.8	8.5	0.0	32.5	118	1.4
Portugal	92.2	10.36	63.9	12.4	-1.5	21.4	78	1.56
Sweden	438.6	9.9	75.5	7.4	-0.6	33.7	123	4.2
Austria	83.9	8.7	71.1	5.7	0.1	35.5	129	1.0
Denmark	42.9	5.7	73.5	6.2	-0.4	34.2	125	1.0
Finland	338.4	5.5	68.5	9.4	0.7	30.3	110	0.5
Ireland	69.8	4.76	63.3	9.4	-1.9	36.8	134	7.8
Luxembourg	2.6	0.6	66.1	6.7	0.8	73.0	266	4.8
Poland	312.7	38.0	62.9	7.5	-1.5	18.6	68	3.6
Czech Republic	78.9	10.6	70.2	5.0	-1.1	23.2	84	4.5
Hungary	93.0	9.8	63.9	6.8	-0.9	18.6	68	2.9
Slovakia	49.0	5.4	62.7	11.5	-1.7	21.1		3.6
Lithuania	65.3	2.9	67.2	9.1	-1.6	20.6	75	1.6
Latvia	64.6	2.0	68.1	9.9	-0.9	17.5	64	2.7
Slovenia	20.3	2.1	65.2	9.0	-0.7	22.6	82	2.9
Estonia	45.2	1.3	71.9	6.2	-1.2	20.9	76	1.1
Cyprus	9.3	0.85	62.7	14.9	-1.2	22.4	82	1.65
Malta	0.3	0.4	63.9	5.4	-0.4	23.6	86	6.4
Bulgaria	110.4	7.2	62.9	9.1	-2.3	12.8	47	3.0
Romania	238.4	19.85	61.4	6.8		15.2	55	3.85
Croatia	56.6 ⁷	4.2	55.8	16.3	-1.0	16.1	59	1.6
EU-28	4,463,4	510.156	65.6	9.4	-0.8	27.5	100	2.0

¹ The data have been standardized for international comparison and may therefore deviate from national figures
 ² Working population between 15 and 64 years related to the population of the same age
 ³ Unemployment rates are based on definitions in line with the International Labour Organisation recommendations. Unemployed in percent of labour force (employed and unemployed) from the age of 15
 ⁴ as of February 2016. PPS = purchasing power standards
 ⁵ preliminary figure
 ⁶ estimated
 ⁷ 2014
 Deviations as to sume due to rounding.

Deviations as to sums due to rounding Source: Eurostat





Source: "Regional Accounts of the Federal States" working group (as of July 2016)



5. Economic power of Saxony and Germany as compared to the weakest and strongest regions of the EU (NUTS 2 level) 2014 (EU-28 = 100)

BE: Belgium, BG: Bulgaria, DE: Germany, FR: France, LU: Luxembourg, RO: Romania, SK: Slovakia, UK: United Kingdom 'Purchasing Power Standard (PPS) Source: Eurostat (as of September 2016)

6. Employment rates of the EU member states and German federal states 2015 (%) Labour force, total

	Regions	Employment rate ¹		Regions	Employment rate ¹
1	Sweden	81.7	9	Austria	75.5
	Dresden	80.9		Saarland	75.0
	Saxony	80.4		North Rhine-Westphalia	74.7
	Chemnitz	80.3	10	Spain	74.3
	Saxony-Anhalt	80.1	11	Lithuania	74.1
	Bavaria	80.0	12	Czech Republic	74.0
	Brandenburg	79.9	13	Cyprus	73.9
	Leipzig	79.9	14	Portugal	73.4
2	The Netherlands	79.6		EU-28	72.5
	Baden-Württemberg	79.4		Bremen	72.0
	Thuringia	78.9	15	Slovenia	71.8
	Hamburg	78.6	16	France	71.2
3	Denmark	78.5	17	Luxembourg	70.9
	Schleswig-Holstein	78,0	17	Slovakia	70.9
	Mecklenburg-Western Pomerania	77.8	19	Ireland	70.0
4	Germany	77.6	20	Bulgaria	69.3
	Rhineland-Palatinate	77.0	21	Hungary	68.6
5	United Kingdom	76.9	22	Poland	68.1
	Hesse	76.8	23	Greece	67.8
	Lower Saxony	76.8	24	Belgium	67.6
6	Estonia	76.7	24	Malta	67.6
	Berlin	76.3	26	Croatia	66.8
7	Finland	75.8	27	Romania	66.1
8	Latvia	75.7	28	Italy	64.0

¹ working population (employed and unemployed) from the age of 15 to 64 related to the population of the same age Source: Eurostat (as of September 2016)



7. Development of employees subject to social insurance contributions by federal states Change 30 June 2016 as against 30 June 2010 (%)

Source: Federal Employment Agency (preliminary results based on job location principle, as of September 2016), own calculations

8. Unemployment rate¹ (%)



¹ % unemployment of entire civilian labour force, annual average Source: Federal Employment Agency

9. Unemployment rates¹ in the border areas of Saxony, Poland and the Czech Republic 2015 (%)



¹ unemployed percentage of labour force (employed and unemployed), 15 years and older

Definition of unemployment rates is based on definitions that are in keeping with the recommendations by the International Labour Organisation (ILO), therefore the unemployment rates determined on national level may vary

Source: Eurostat (as of September 2016)



10. Gross value added in Saxony for selected business sectors (million euro)

Source: "Regional Accounts of the Federal States" working group (as of July 2016)





Source: "Regional Accounts of the Federal States" working group (as of July 2016)

12. Overnight stays of foreign guests in lodging establishments and at camping sites¹ in Germany 2015

	Overnight stays of foreign guests			
		Changes as against 2014	Share in total number of overnight stays of foreign guests	
	1,000	%	%	
Bavaria	17,556	5.9	22.0	
Berlin	13,648	9.2	17.1	
Baden-Württemberg	11,124	7.6	14.0	
North Rhine-Westphalia	10,139	1.0	12.7	
Hesse	7,121	6.3	8.9	
Rhineland-Palatinate	5,360	1.9	6.7	
Lower Saxony	3,652	2.7	4.6	
Hamburg	3,108	5.9	3.9	
Schleswig-Holstein	1,974	5.5	2.5	
Saxony	1,907	3.5	2.4	
Mecklenburg-Western Pomerania	1,021	2.0	1.3	
Brandenburg	961	5.3	1.2	
Thuringia	584	-0.9	0.7	
Saxony-Anhalt	552	5.6	0.7	
Bremen	500	3.0	0.6	
Saarland	464	0.2	0.6	
New German federal states incl. Berlin	18,673	7.5	23.4	
Old German federal states excl. Berlin	60,998	4.8	76.6	
Germany	79,671	5.4	100.0	

¹ Lodging establishments of min. 10 beds and camping sites of min. 10 pitches Source: German Federal Office of Statistics (as of August 2016), own calculations

13. Craft businesses 2015

	Craft businesses existing on 31 December 2015 (annex A, A simple activities, B1 and B2)			
	Number	Businesses per 1,000 inhabitants	Share in Germany (%)	
Baden-Württemberg	132,841	12.2	13.2	
Bavaria	202,254	15.7	20.1	
Berlin	30,015	8.5	3.0	
Brandenburg	39,523	15.9	3.9	
Bremen	5,360	8.0	0.5	
Hamburg	15,092	8.4	1.5	
Hesse	74,538	12.1	7.4	
Mecklenburg-Western Pomerania	20,271	12.6	2.0	
Lower Saxony	82,958	10.5	8.3	
North Rhine-Westphalia	188,863	10.6	18.8	
Rhineland-Palatinate	51,795	12.8	5.2	
Saarland	12,005	12.1	1.2	
Saxony	58,299	14.3	5.8	
Saxony-Anhalt	27,761	12.4	2.8	
Schleswig-Holstein	31,472	11.0	3.1	
Thuringia	30,947	14.3	3.1	
New German federal states incl. Berlin	206,816	12.8	20.6	
Old German federal states excl. Berlin	797,178	12.1	79.4	
Germany	1,003,994	12.2	100.0	

Source: German Confederation of Skilled Crafts, German Federal Office of Statistics, own calculations

14. Human resources in science and technology (HRST)¹ in EU member states and for Germany in the NUTS-2 regions 2015

	Regions	% of working population
1	Luxembourg	56.2
	Hamburg	55.0
	Upper Bavaria	54.3
	Berlin	54.0
2	Sweden	52.0
3	United Kingdom	51.9
4	Finland	51.2
	Darmstadt	50.7
5	Ireland	50.0
6	Belgium	48.9
	Stuttgart	48.5
7	Denmark	48.4
8	France	48.4
9	The Netherlands	48.4
	Karlsruhe	48.3
	Cologne	48.2
10	Cyprus	48.2
	Hesse	47.9
11	Estonia	47.7
	Baden-Württemberg	47.2
	Dresden	47.1
12	Lithuania	47.1
	Tübingen	46.9
	Bavaria	46.9
13	Austria	46.8
	Rhinehesse-Palatinate	46.7
	Leipzig	46.7
	Middle Franconia	46.5
	Braunschweig	45.9
14	Germany	45.8
	Giessen	45.6
	Hanover	45.6
	Saxony	45.4
	Rhineland-Palatinate	45.0
	Düsseldorf	44.9
	Brandenburg	44.8
	Lower Franconia	44.6

	Regions	% of working population
	North Rhine-Westphalia	44.4
	Schleswig-Holstein	44.3
	Bremen	43.9
	Freiburg	43.8
	Lower Saxony	43.4
	Lüneburg	43.3
	Koblenz	43.3
	Trier	43.3
	EU-28	43.3
15	Slovenia	42.9
	Chemnitz	42.7
	Upper Palatinate	42.4
	Münster	42.4
	Schwaben	42.3
	MecklW. Pomerania	42.0
	Arnsberg	42.0
16	Latvia	41.6
	Upper Franconia	41.5
17	Spain	41.5
	Detmold	41.4
	Thuringia	41.3
	Kassel	40.8
	Saarland	40.6
	Saxony–Anhalt	40.6
18	Poland	40.1
	Weser-Ems	40.0
	Lower Bavaria	37.4
19	Malta	37.2
20	Czech Republic	37.0
21	Bulgaria	35.5
22	Hungary	35.3
23	Greece	35.0
24	Italy	34.1
25	Croatia	33.9
26	Portugal	33.0
27	Slovakia	32.3
28	Romania	25.1

¹ persons working in a science and technology occupation and/or persons who have completed a scientific-technological study, HRST as share in working population aged between 15 and 74 Source: Eurostat

15. R&D intensity¹ (%)



left bar Saxony, right bar Germany 'share of R&D expenditure in GDP Source: German Federal Office of Statistics

16. Patent applications per 100,000 inhabitants Change 2015 as against 2005 (%)



Source: German Patent and Trademark Office, own calculations

17. Road network length and density as of 01 January 2016

	Road network length		Road network density			
	k	m	km per 1,000 km ²		km per 1,000 inhabitants	
	Germany	Saxony	Germany	Saxony	Germany	Saxony
Federal motorways	12,993	567	36	31	0.16	0.14
Federal roads	38,303	2,307	107	125	0.47	0.56
State roads	86,850	4,820	243	261	1.06	1.18
District roads	91,936	5,748	257	312	1.12	1.41
Total	230,082	13,442	644	729	2.80	3.29

Source: German Federal Office of Statistics, Federal Statistical Office and the statistical Offices of the German federal states, own calculations

	The length of the Federal motorways network in Saxony comprises the following sections:				
A 4 Aachen – Görlitz 211.1 km					
A 9 Berlin – Munich		20.4 km			
A 13	Berlin – Dresden	26.4 km			
A 14 Magdeburg – Dresden		98.5 km			
A 17	Dresden – Praha	44.6 km			
A 38	Göttingen – Halle / Leipzig	38.2 km			
A 72	Hof – Leipzig	 126.6 km			

Source: Saxon State Ministry for Economic Affairs, Labour and Transport

18. Gross electricity generation by energy carriers 2014¹ in billion kWh (%)



¹ Preliminary data, as of January 2016 Source: AG Energiebilanzen, Statistical Office of the Free State of Saxony

19. Foreign trade, Saxony

	Exp	ort	Im	port
	million euro	Change to previous year %	million euro	Change to previous year %
1991	2,581.6	-	2,086.8	-
1992	2,587.2	0.2	2,641.2	26.6
1993	2,721.9	5.2	2,648.9	0.3
1994	3,099.3	13.9	3,319.4	25.3
1995	3,645.9	17.6	3,858.2	16.2
1996	3,804.6	4.4	4,315.4	11.9
1997	5,376.3	41.3	4,865.1	12.7
1998	7,873.7	46.5	5,785.0	18.9
1999	8,876.7	12.7	5,823.7	0.7
2000	10,425.4	17.4	7,327.2	25.8
2001	13,209.1	26.7	8,046.1	9.8
2002	13,931.7	5.5	8,309.3	3.3
2003	15,143.9	8.7	9,002.3	8.3
2004	16,259.6	7.4	9,732.2	8.1
2005	17,696.2	8.8	10,623.5	9.2
2006	19,589.9	10.7	13,746.9	29.4
2007	23,432.6	19.6	14,856.3	8.1
2008	23,200.0	-1.0	15,388.8	3.6
2009	19,501.1	-15.9	13,605.3	-11.6
2010	24,743.4	26.9	16,902.7	24.2
2011	29,408.4	18.9	20,252.9	19.8
2012	31,827.7	8.2	19,477.9	-3.8
2013	31,430.3	-1.2	18,988.8	-2.5
2014	35,907.1	14.2	20,616.0	8.6
2015	38,349.8	6.8	22,115.1	7.3

	Major foreign trade partners:		
	Export	Import	
	China	Czech Republic	
	USA	Poland	
2015	United Kingdom	China	
	France	The Netherlands	
	Poland	Russian Federation	

Source: German Federal Office of Statistics, own calculations





Source: German Federal Office of Statistics, own calculations



21. Major buyer and supplier countries of Saxony 2015 (million euro)



22. Investment rates of the old and new non-city states (excluding Saxony) and Saxony (%)¹

¹ Rates as proportions of the adjusted figures (federal states budgets)

Source: German Federal Office of Statistics, Saxon State Ministry of Finance (figures for Saxony)





	1991	1992	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012	2014	2015
Saxony-Anhalt	168	906	2,130	3,512	4,409	5,154	6,111	7,172	7,857	8,259	8,761	9,103	9,169	8,987
Thuringia	266	637	1,907	2,882	3,731	4,460	5,069	5,945	6,803	6,724	7,243	7,437	7,280	7,222
Brandenburg	153	974	2,786	3,855	4,510	4,921	5,666	6,384	6,716	6,781	7,081	7,330	6,820	6,774
Mecklenburg-Western Pomerania	124	405	1,537	2,754	3,704	4,200	4,955	5,958	6,312	5,928	5,956	5,976	5,867	5,777
Saxony	325	734	1,377	1,883	2,180	2,317	2,511	2,752	2,849	2,849	2,847	2,844	2,807	2,782

¹ Debt of capital market funds and with public core budgets of the federal states (Saxony: budgetary debt level);

Population as of 30 June of the year concerned

Source: German Federal Office of Statistics, Saxon State Ministry of Finance

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