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# Doing Business in Eastern Germany

## **How far East?**

Eastern Germany – the No. 1 Business Location for North American Investment Success

Chicago, 11 Jun 2009



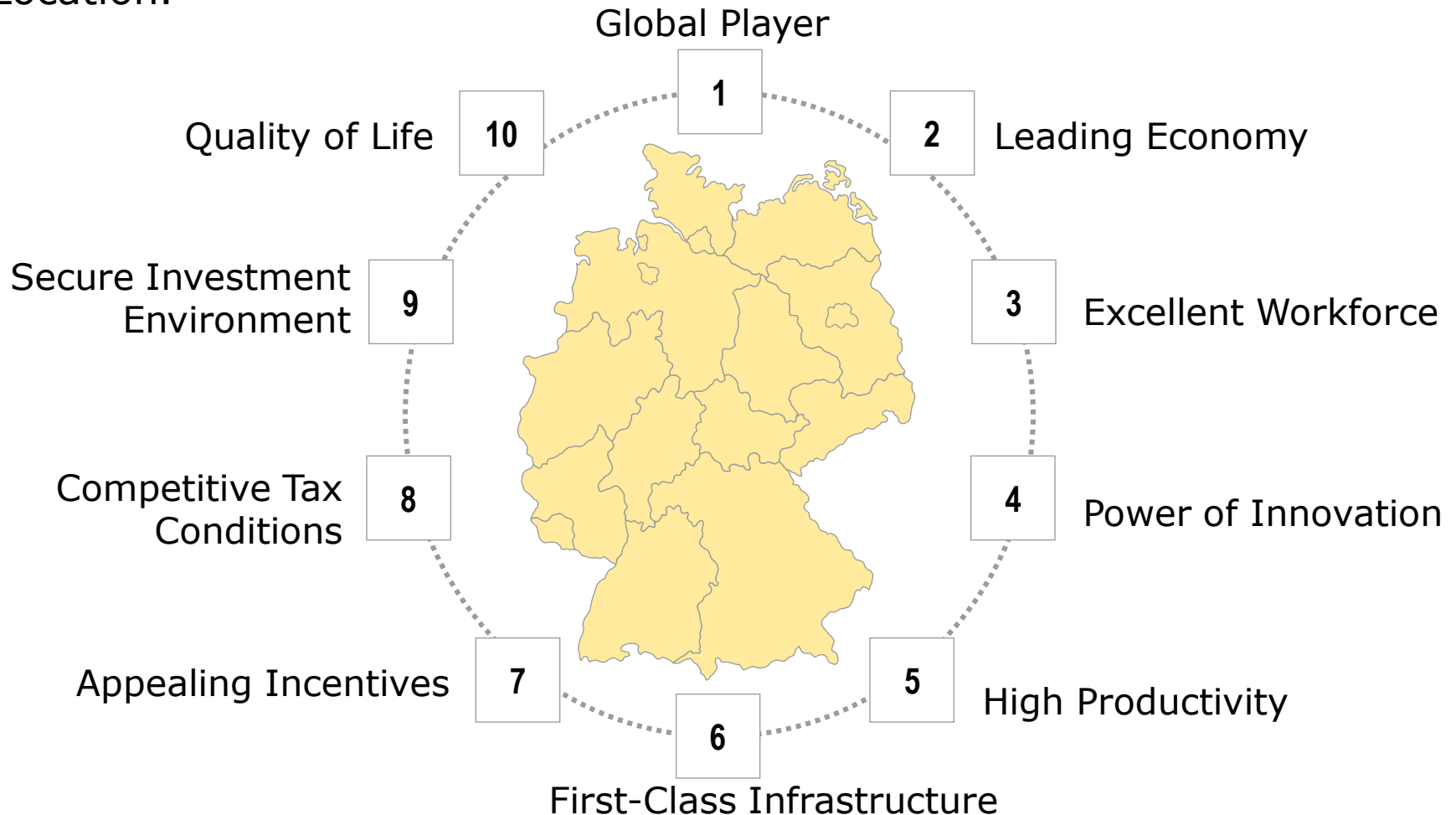
GERMANY  
TRADE & INVEST

- I. The Company's Profile: About Germany Trade and Invest
- II. Eastern Germany: Advantages as a Business Location
- III. Eastern Germany's Emerging Industries
- IV. Contact

- Germany Trade and Invest is the foreign trade and inward investment agency of the Federal Republic of Germany.  
**Our mission is to promote Germany as a location for industrial and technological investments and to identify investors for the German market.**
- We advice and support foreign companies seeking to expand into the German market.
- Our range of services includes strategic planning, competitive analysis as well as support on financial and legal issues. Our experts provide comprehensive project management and support services from site selection to the final realization of the investment.

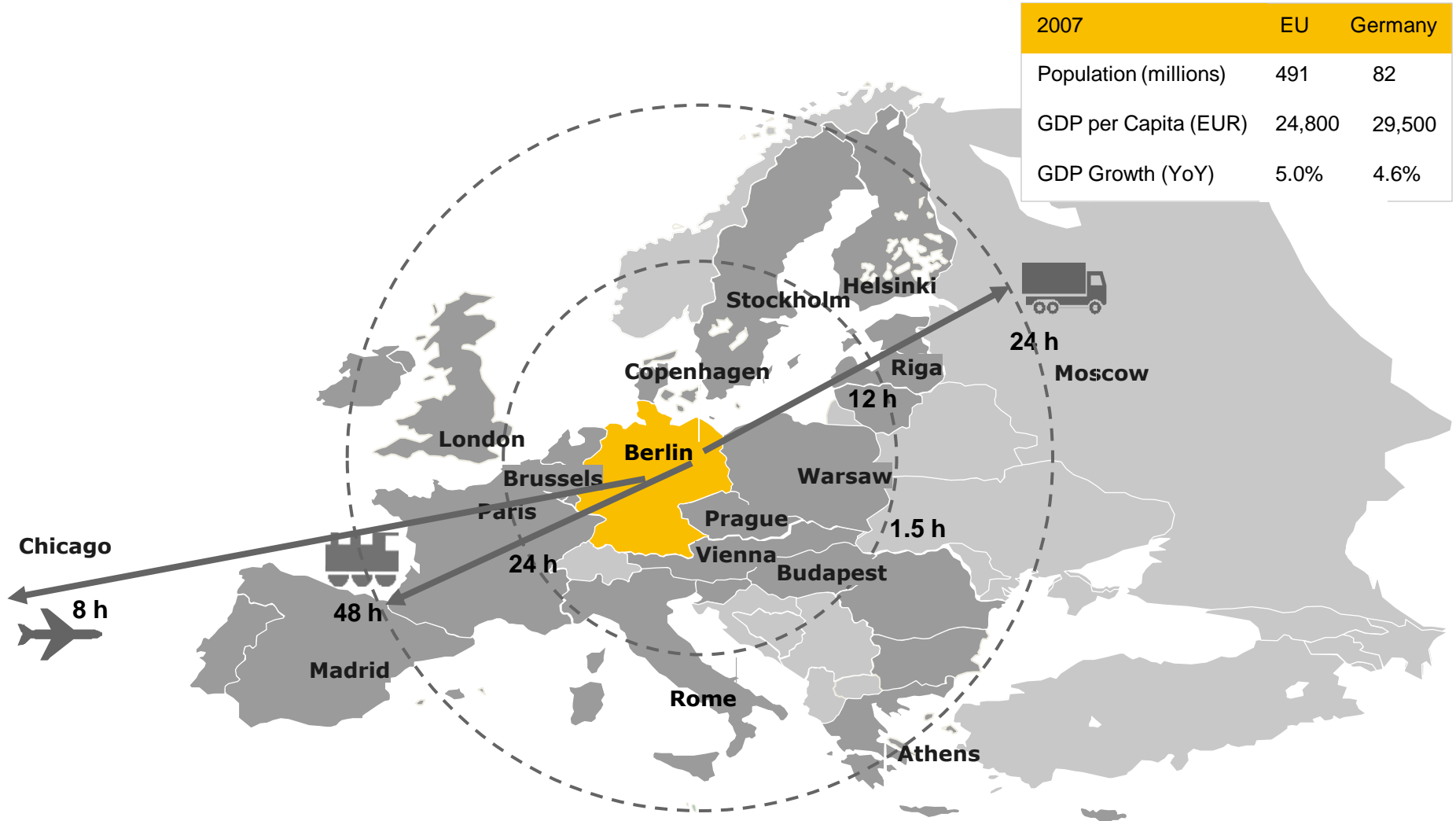
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The strengths and potential inherent in Eastern Germany provide investors with numerous arguments to choose Germany as a Business Location.



# Germany - EU's New Geographic Center

Providing rapid & easy access to all European markets.\*

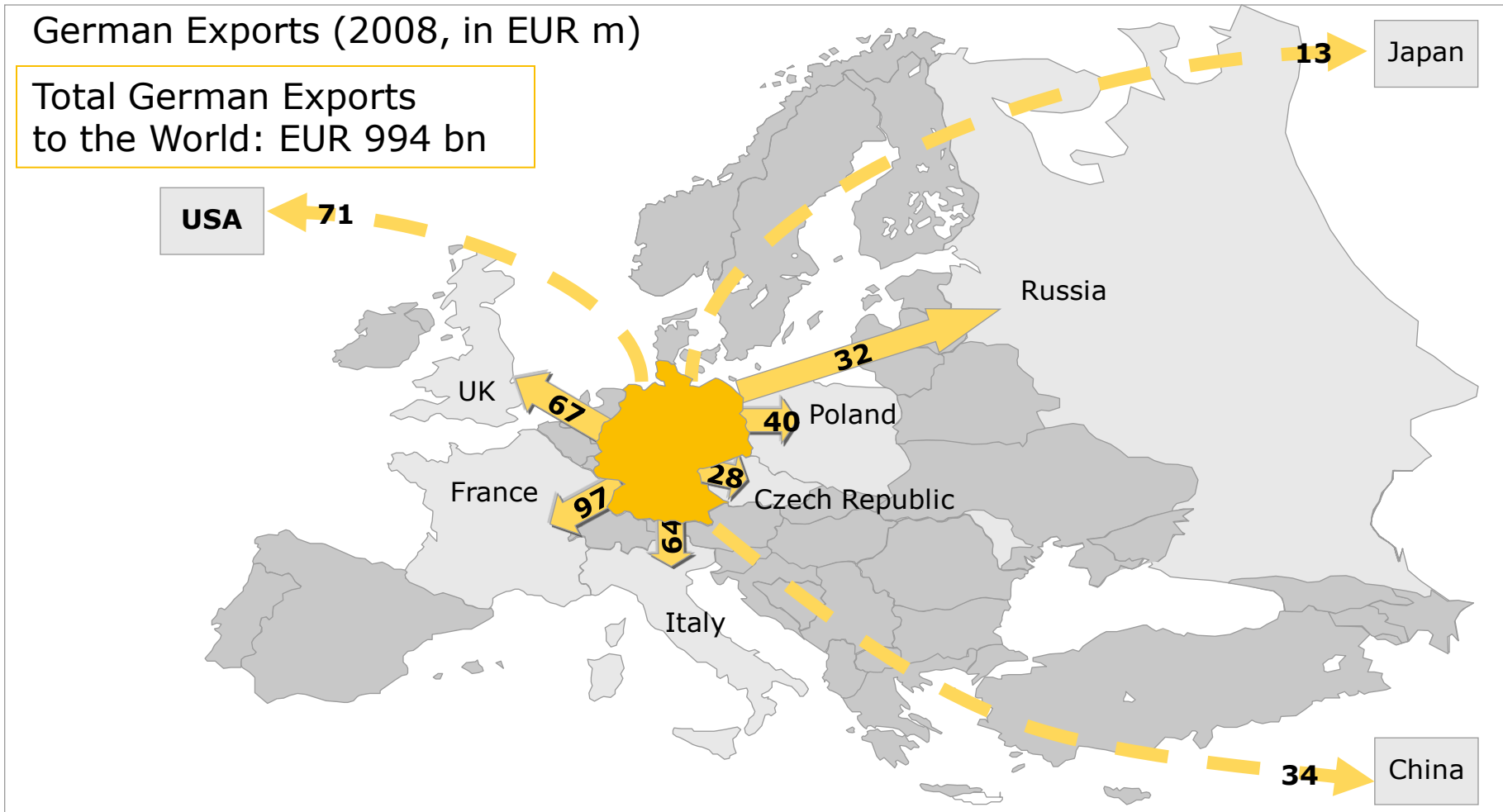


Source: Eurostat

\* EU-27's center: 42 km east of Frankfurt/Main in Meerholz, Hessen

# Germany - Global Player

Germany is *the* focal point for goods and services in Europe.



Source: Federal Statistical Office Germany 2009

# Germany - Leading Economy

Germany is Europe's largest market.

Share of Total GDP and Population in the European Union (2007<sup>1</sup>, in EUR bn)

	GDP	Share of Total GDP (EU 27)	Population in m	Share of Total Population (EU27)
<b>Germany</b>	<b>2.423</b>	<b>20%</b>	<b>82</b>	<b>17%</b>
UK	2.026	17%	61	12%
France	1.860	15%	63	13%
Spain	1.050	9%	44	9%
Netherlands	556	5%	16	3%
Poland	306	3%	38	8%
Czech Rep.	126	1%	10	2%
Slovak Rep.	55	0%	5	1%
<b>USA</b>	<b>10.101</b>		<b>303</b>	
Canada	1.055		33	
Japan	3.203		128	
EU 27	12.233		495	
Eurozone	8.846		318	

Note: <sup>1</sup> forecasts (except Germany)

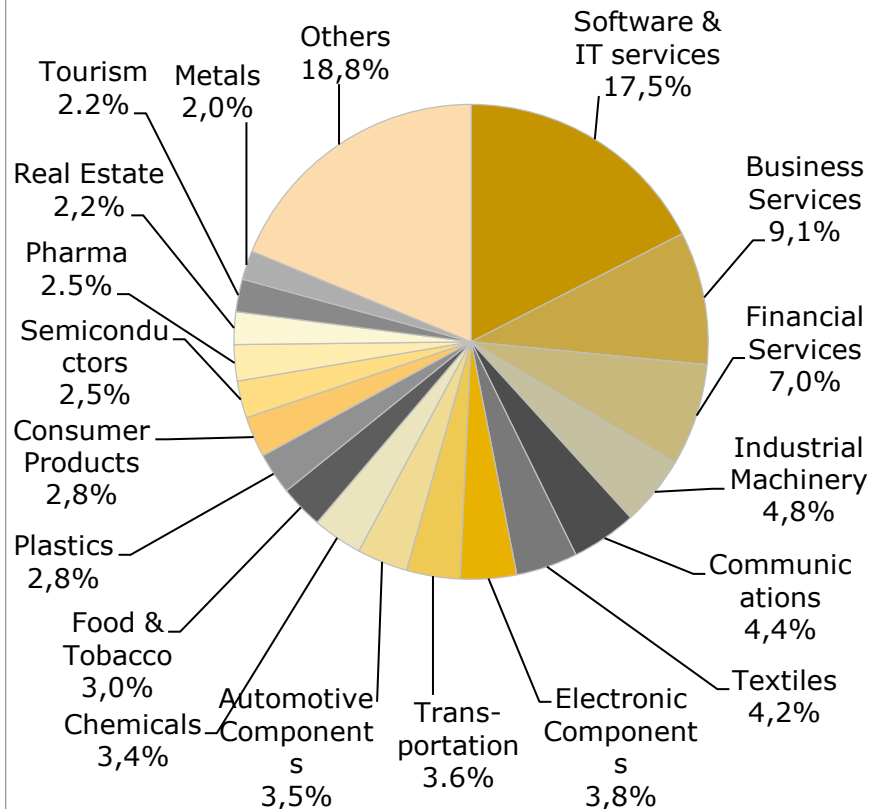
Source: Eurostat 2007, US Census Bureau, Japanese Ministry of Internal Affairs



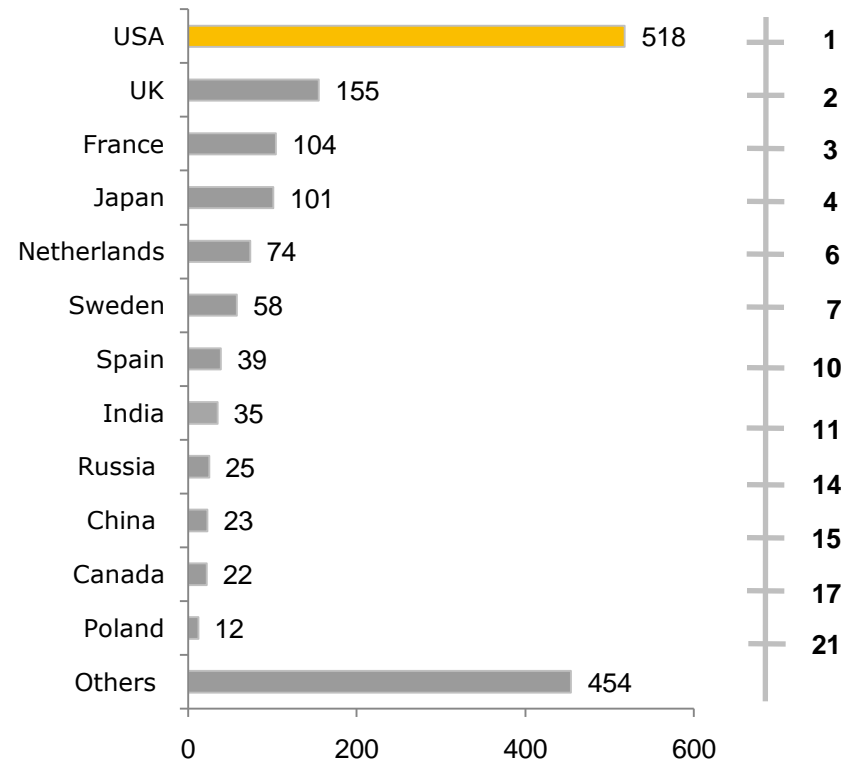
# Investment Projects

The majority of FDI projects consisted of software & IT services, business services and financial services over the last 5 years.

Projects in Germany by Sector (2003-2007)

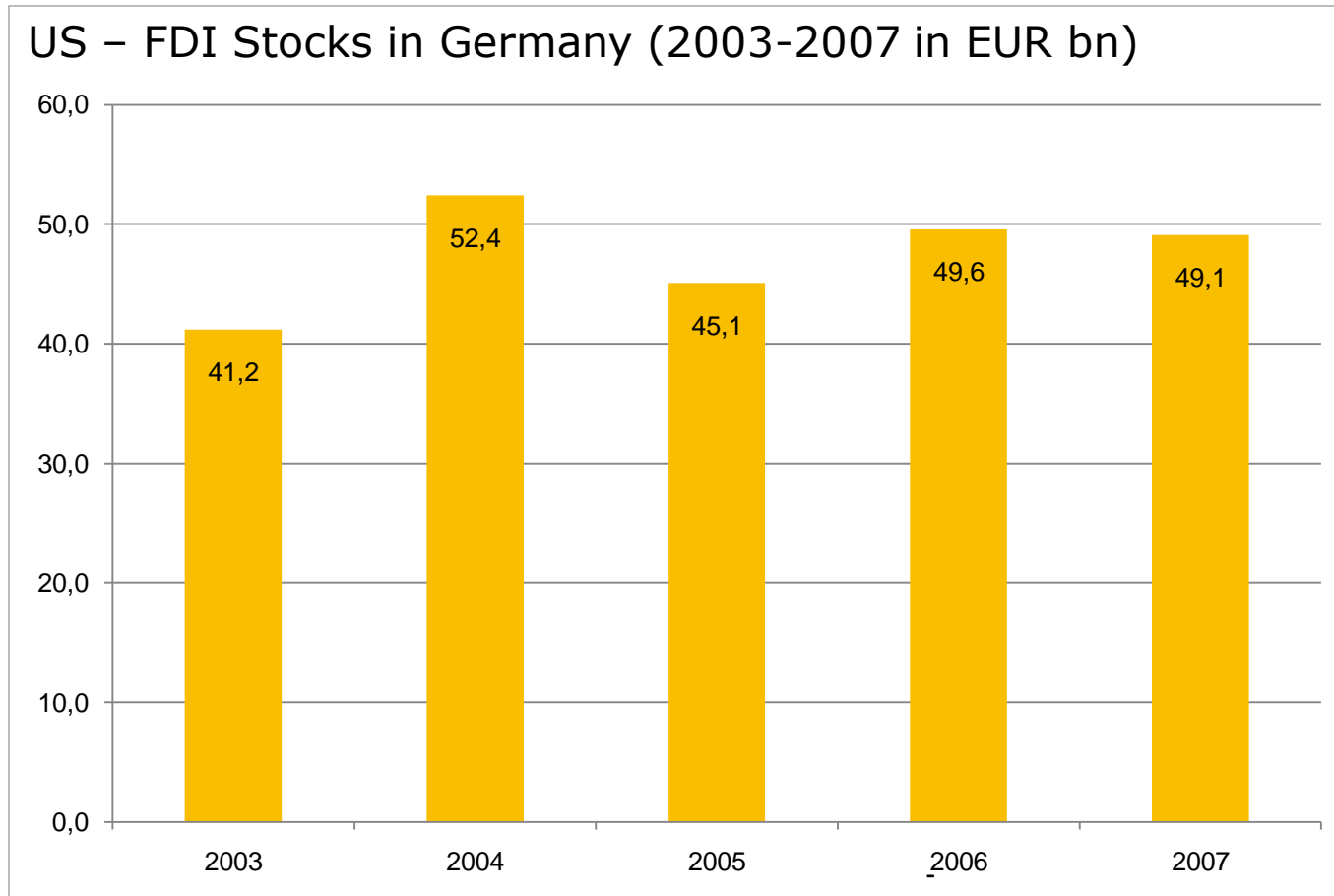


Projects ranked in Germany by country of origin (2003-2007)



Source: fDi Markets, 2008, Sept.

## US FDI Stocks in Germany

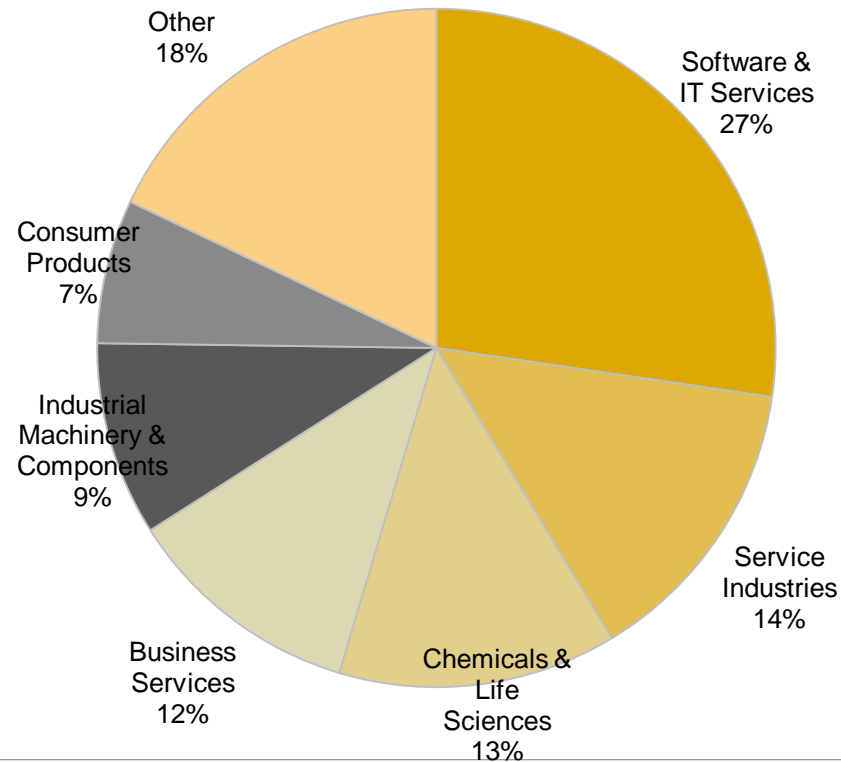


Source: Bundesbank, 2008

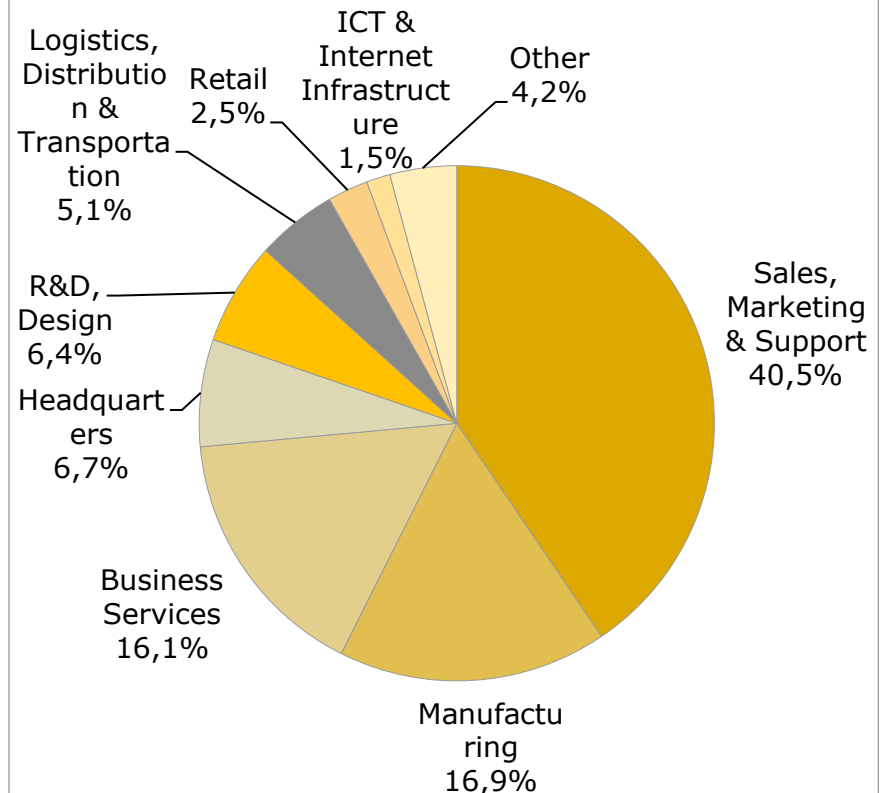
# US FDI Projects

US FDI projects have focused strongly on the service sector within the last six years.

US Projects in Germany by Sector (2003-2008)



US Projects in Germany by Business Activity (2003-2008)



Source: fDi Markets, 2008

## Number of US Companies and Employees in Germany by Federal State

<b>Federal States</b>	<b>US companies(Approx. Value)</b>	<b>Employees (Approx. Value)</b>
North Rhine-Westphalia	1.290	201.891
Bavaria	1.205	120.918
Hessen	1.140	163.386
Baden-Württemberg	650	91.731
Berlin	375	20.484
Hamburg	305	10.157
Niedersachsen	240	23.536
Rheinland-Pfalz	160	76.500
Schleswig-Holstein	115	13.000
Saxony	100	10.500
Saxony-Anhalt	55	7.503
Bremen	45	5.215
Brandenburg	45	2.413
Thuringia	40	2.094
Saarland	20	1.140
Mecklenburg-Vorpommern	15	745
<b>Total</b>	<b>5.800</b>	<b>751.213</b>

Source: Bureau van Dijk Electronic Publishing, Markus Datenbank, 2009

The biggest US companies in Germany by turnover (2008, in EUR m).

<b>Biggest US companies in Germany by turnover</b>	<b>Turnover 2007 (in EUR m)</b>
AMD Fab 36 Holding GmbH	1.018,8
AMD Saxony Holding GmbH	350,9
Zellstoff Stendal GmbH	313,3
Zellstoff Stendal Holz GmbH	212,4
Siemens Enterprise Communications Manufacturing	210
Euromar Commodities GmbH	172,6
AWD.pharma GmbH & Co.KG	150
Rausch Schokoladen GmbH	125
Saale Energie GmbH	122,7
MSA AUER GmbH	122,7
Applied Materials GmbH	118
MIBRAG Industriekraftwerke GmbH & Co. KG	76,4
Aleris Aluminum Bitterfeld GmbH	75
NILES-SIMMONS Industrieanlagen GmbH	60
Truck-Lite Europe GmbH	57,8
MUEG Mitteldeutsche Umwelt- und Entsorgung GmbH	55
Signet Solar GmbH	52,8

Source: Bureau van Dijk Electronic Publishing, Markus Database, May 2009

US companies employ the majority of people, while the most foreign companies in Germany come from the Netherlands.

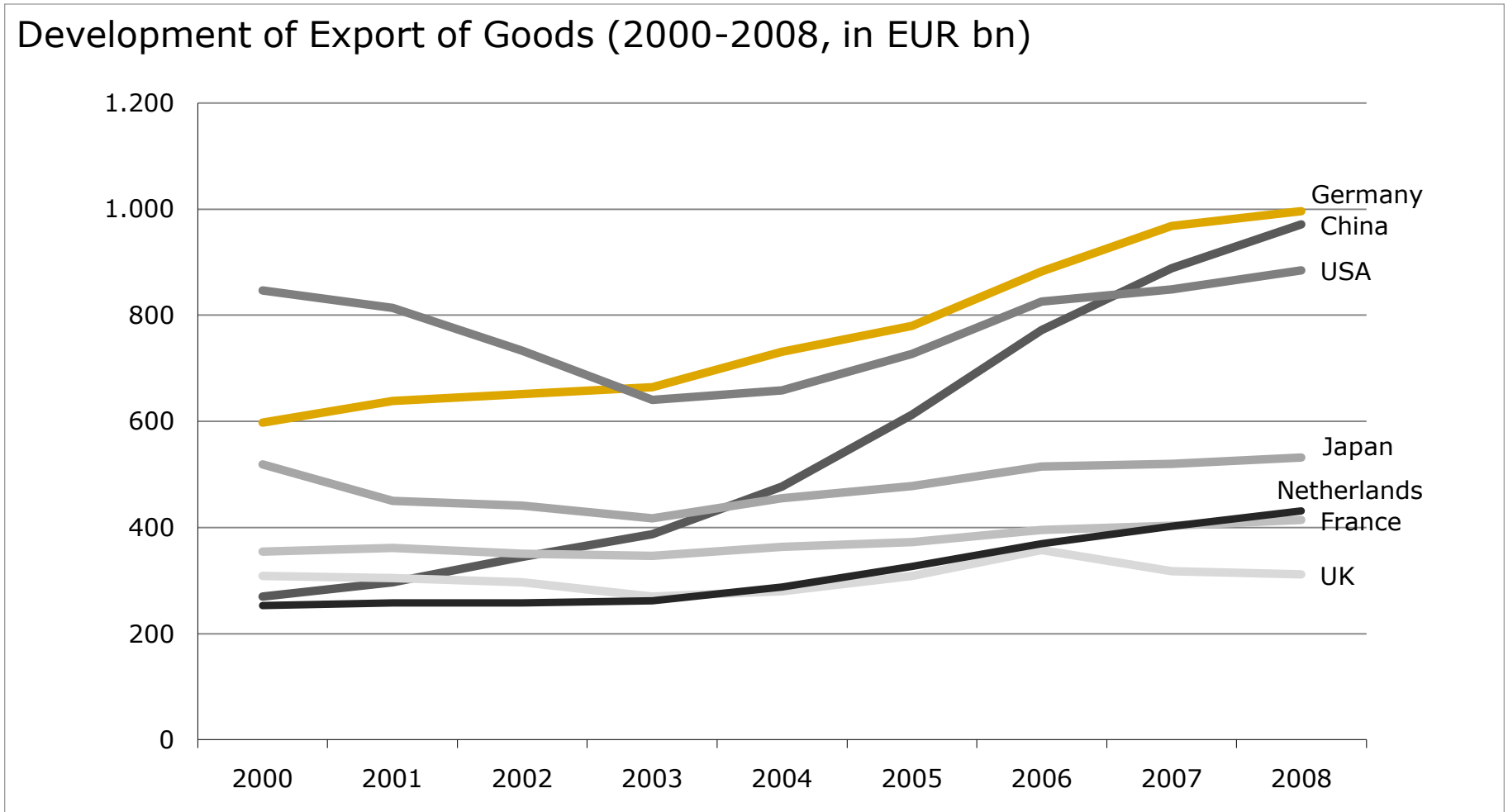
## Number of Foreign Companies and Employees in Germany (2007)

Country	Number of Companies (Approx. Value)	Number of Employees (Approx. Value)
Netherlands	6,700	531,000
<b>USA</b>	<b>5,600</b>	<b>776,000</b>
UK	4,300	303,000
France	3,450	331,000
Sweden	1,200	139,000
Spain	1,000	128,000
Japan	900	122,000
Russia	620	3,000
China	600	5,600
Poland	350	3,800
Canada	290	7,000
Czech Rep.	250	4,800
India	170	6,900

Source: Bureau van Dijk Electronic Publishing, Markus Datenbank, September, 2008

# Germany - Export World Leader

Germany has been the world leader in exporting goods since 2003.



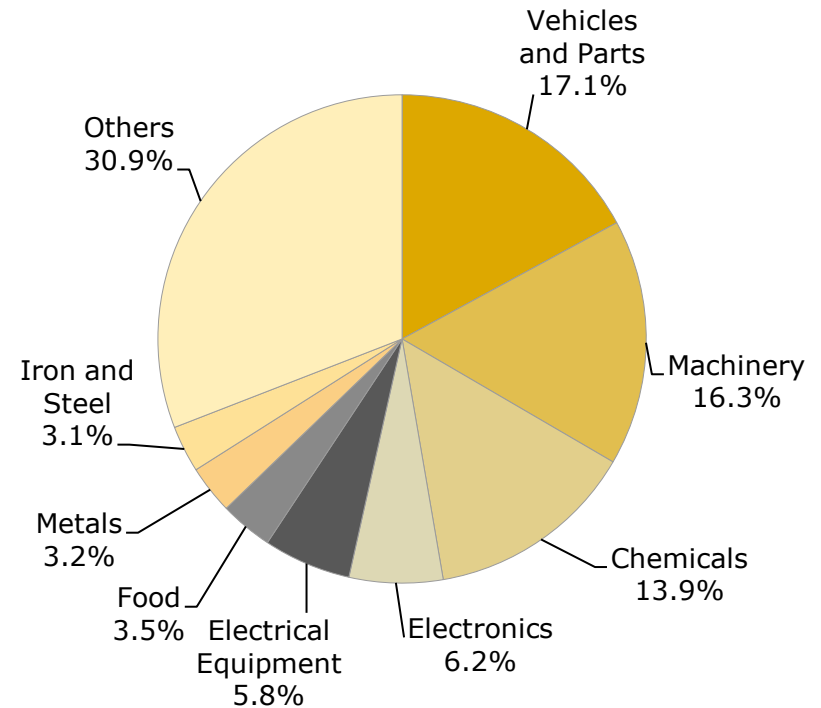
Source: IMD 2009

The main export sectors for Germany are vehicles, machinery and chemicals.

German Exports (2007)

Ranking	Country of Destination	EUR (m)
1	France	93,861
<b>2</b>	<b>USA</b>	<b>73,356</b>
3	UK	70,999
4	Italy	65,148
5	Netherlands	62,374
6	Austria	52,763
7	Belgium	51,407
8	Spain	48,158
9	Switzerland	36,355
10	Poland	36,083
11	China	29,923
12	Russia	28,185
13	Czech Rep.	26,027
14	Sweden	21,678
...		
18	Japan	13,075
...		
26	India	7,354
...		
30	Canada	6,342

Germany's Main Export Sectors (2007)



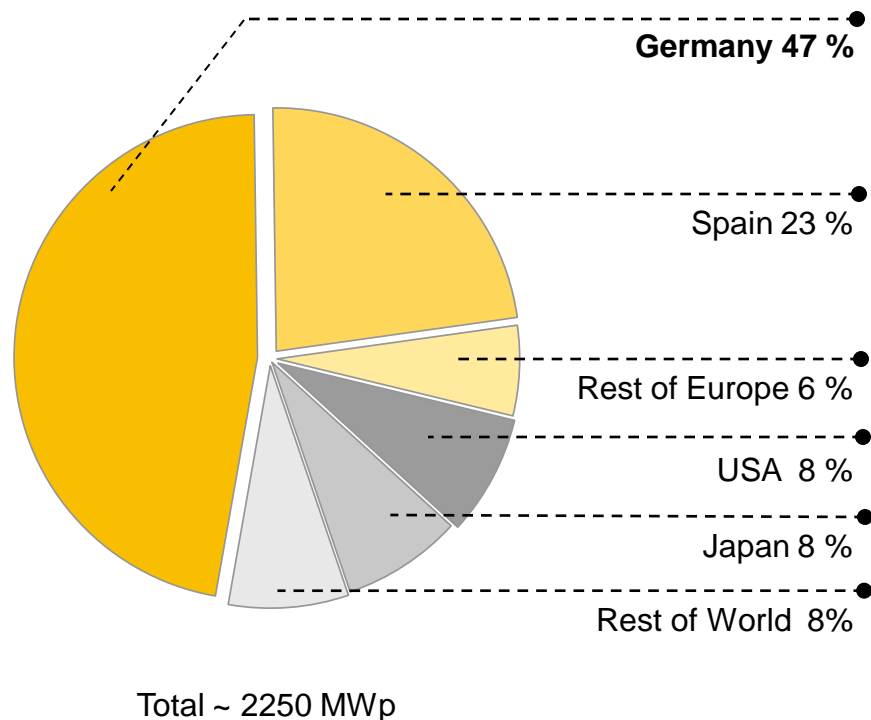
Source: German Federal Statistical Office, 2008; Bfai, 2008



# The German PV Market

Germany is by far the world's largest PV market, with a turnover of € 5.7 billion in 2007.

## World PV Market Regional Share 2007<sup>1</sup>



## German PV Market 2007<sup>2</sup>

Total installed PV Power	3.8 GWp
Newly installed PV power	1,100 MWp
Installed facilities	430,000
PV industry turnover	€ 5.7 billion
Number of employees in PV industry	42,000
Expected CAGR for 2007-12	~25-30%

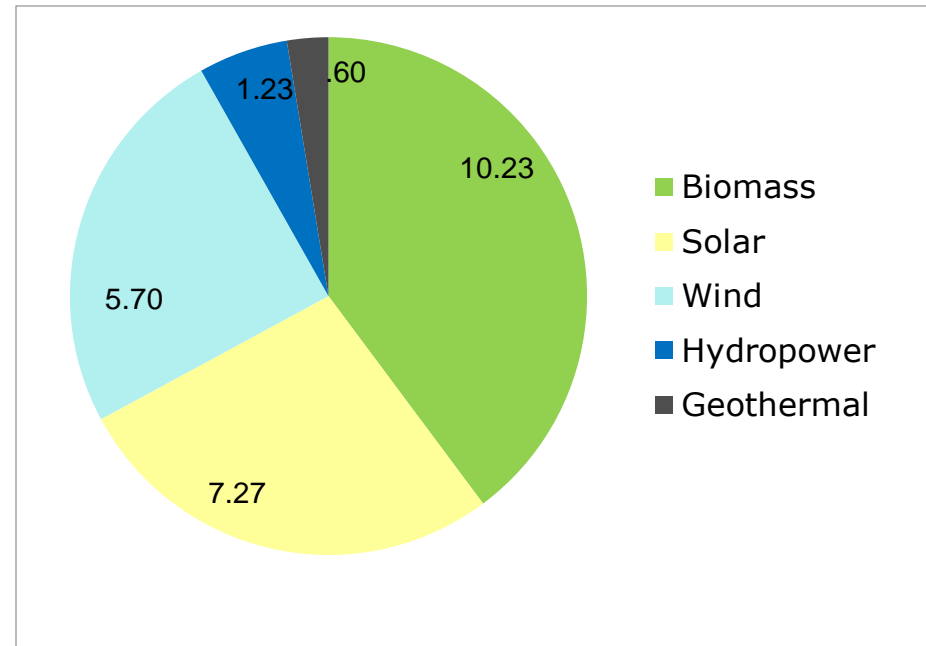
Notes: 1) Source: Solarbuzz March 2008 2) Sources: German Solar Industry Association BSW, Federal Environment Ministry BMU, UBS 2007, EPIA 2007

# Germany World Leader in Renewables

## Key Figures Today

- Nr. 1 worldwide in PV and Wind
- Renewables` Market Share: 10 %
- Labor Market: 280,000 Employees
- Domestic Investments: € 13 billion
- Exports: € 9 billion
- Leading R&D Worldwide
- Pioneering Clean Energy Policy

Total sales in 2007: € 25 bn



Source: Federal Ministry for the Environment, Nature Conservation and Nuclear Safety, 2008, Unendlich viel Energie, 2008

# Trade Partners

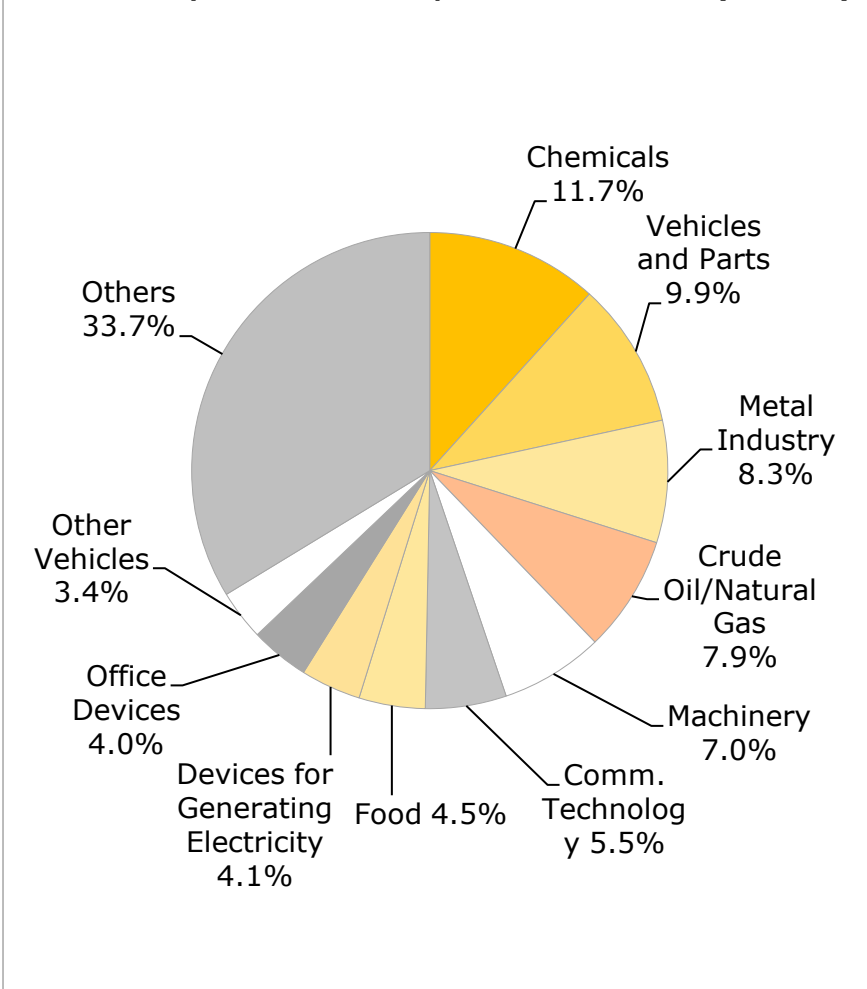
Germany's trade partners are all over the world.

## German Imports (2007)

Ranking	Country of Origin	EUR (m)
1	France	64,912
2	Netherlands	64,328
3	China	54,649
<b>4</b>	<b>USA</b>	<b>45,626</b>
5	Italy	44,347
6	UK	43,41
7	Belgium	38,824
8	Austria	32,753
9	Switzerland	29,786
10	Russia	28,773
11	Czech Rep.	26,213
12	Poland	24,123
13	Japan	24,082
14	Spain	21,143
...		
18	Sweden	14,187
...		
26	India	4,722
...		
36	Canada	3,528

Source: German Federal Statistical Office, 2008

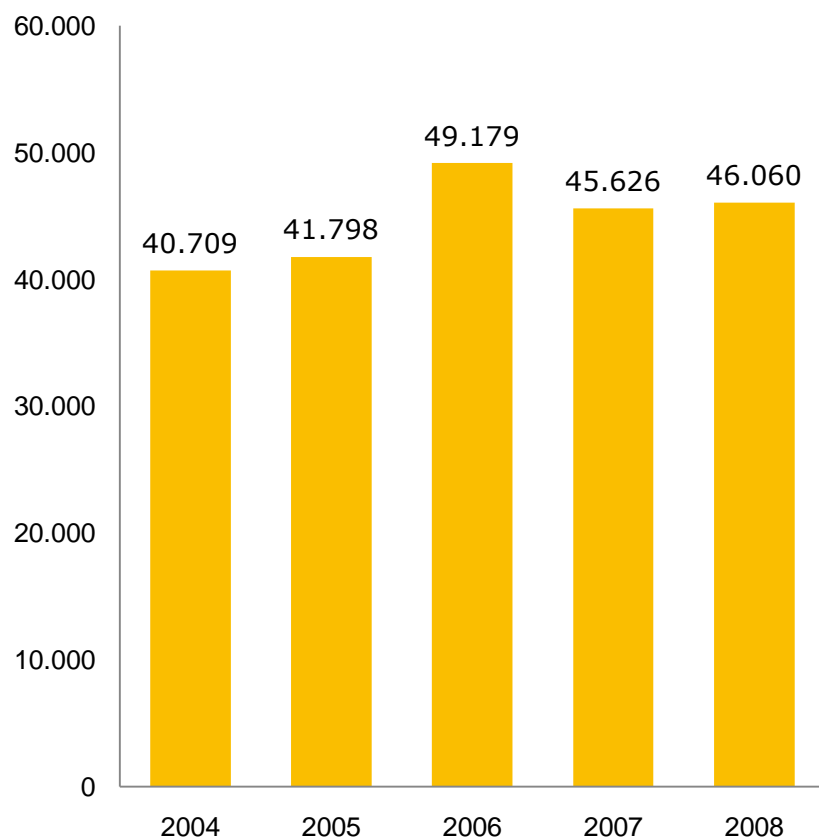
## Germany's Main Import Sectors (2007)



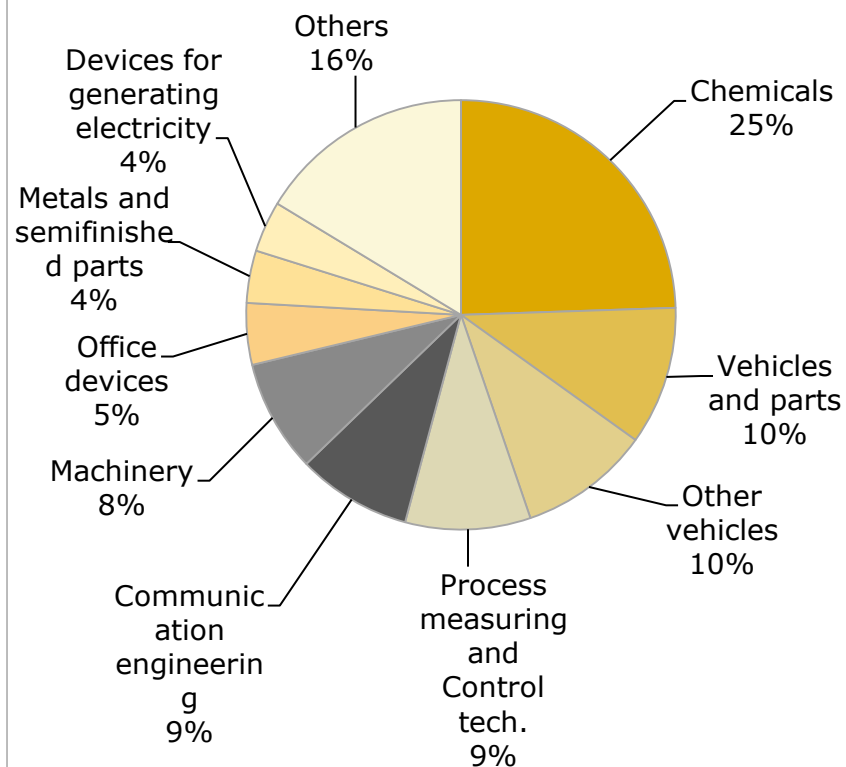
# Trade Partner USA

## Imports from the USA to Germany.

2004-2008, in EUR m



By sectors in 2008



Source: German Federal Statistical Office, 2009

Germany has a well trained and highly motivated workforce.

## Dual Education System<sup>1</sup>

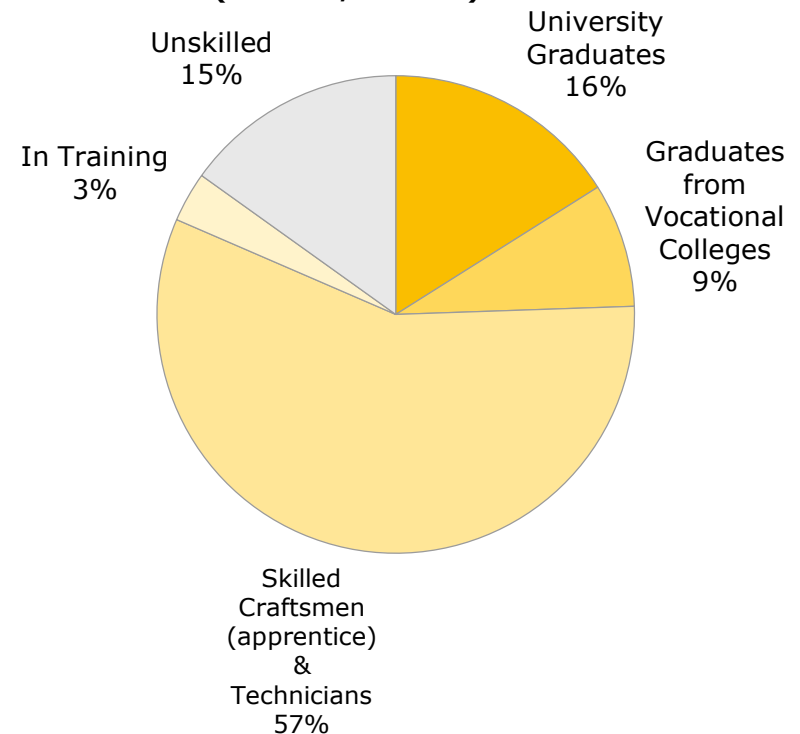
- A combination of on and off-the-job training reduces hiring and training costs, thus minimizing recruitment risks.
- Vocational schools closely cooperate with ca. 500,000 companies in Germany.
- The focus is determined by specific industry needs.

## Higher Education

- Germany has 103 universities and 176 universities of applied sciences (UAS).
- Over 40,000 engineers graduated in 2006.

Note: <sup>1</sup> Dual education system in Germany is a combination of three-year on-the-job training combined with classroom instruction

## Workforce in Germany by Level of Education<sup>2</sup> (2006, in %)

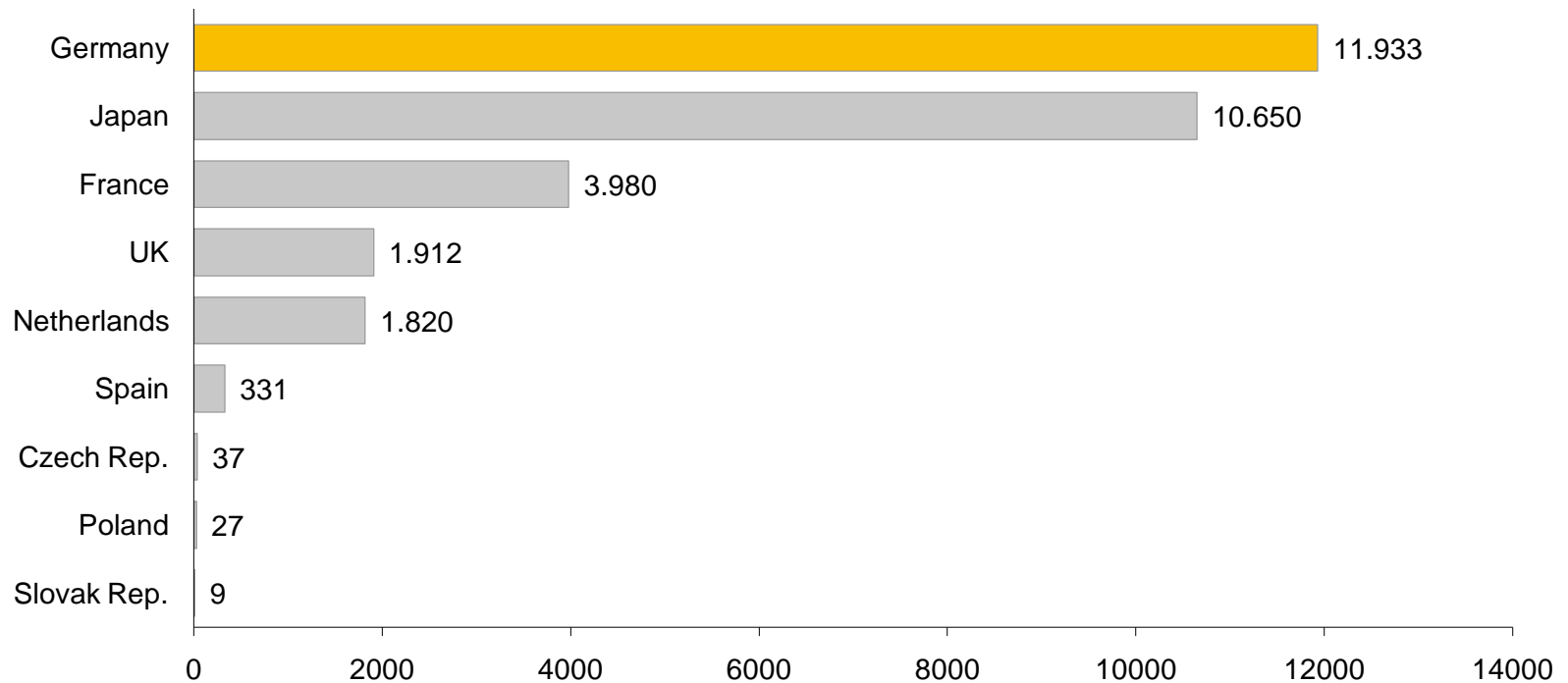


Note: <sup>2</sup> Does not include unemployed people  
Sources: Federal Statistical Office 2007  
Universities' Principals Symposium 2007  
Federal Employment Office 2007

# Germany - Power of Innovation

Germany is Europe's number one in creating innovations for the future.

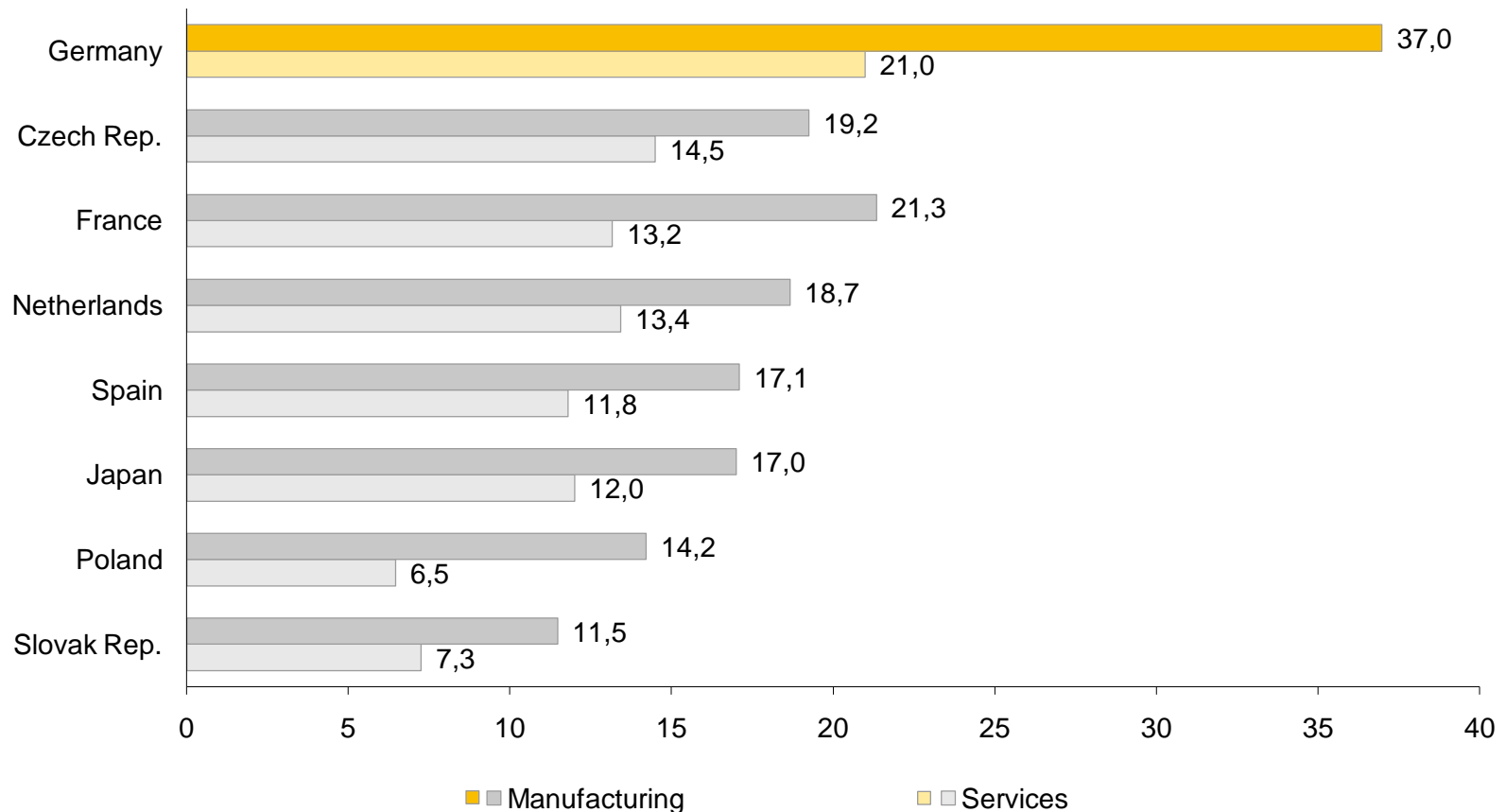
Patents Granted at the European Patent Office (2007, in Absolute Numbers)



Source: EPO, Invest in Germany Research, 2007

Germany is highly valued as a location for Research & Development (R&D).

Share of Companies with In-House R&D by Sector (2002-2004, in %)

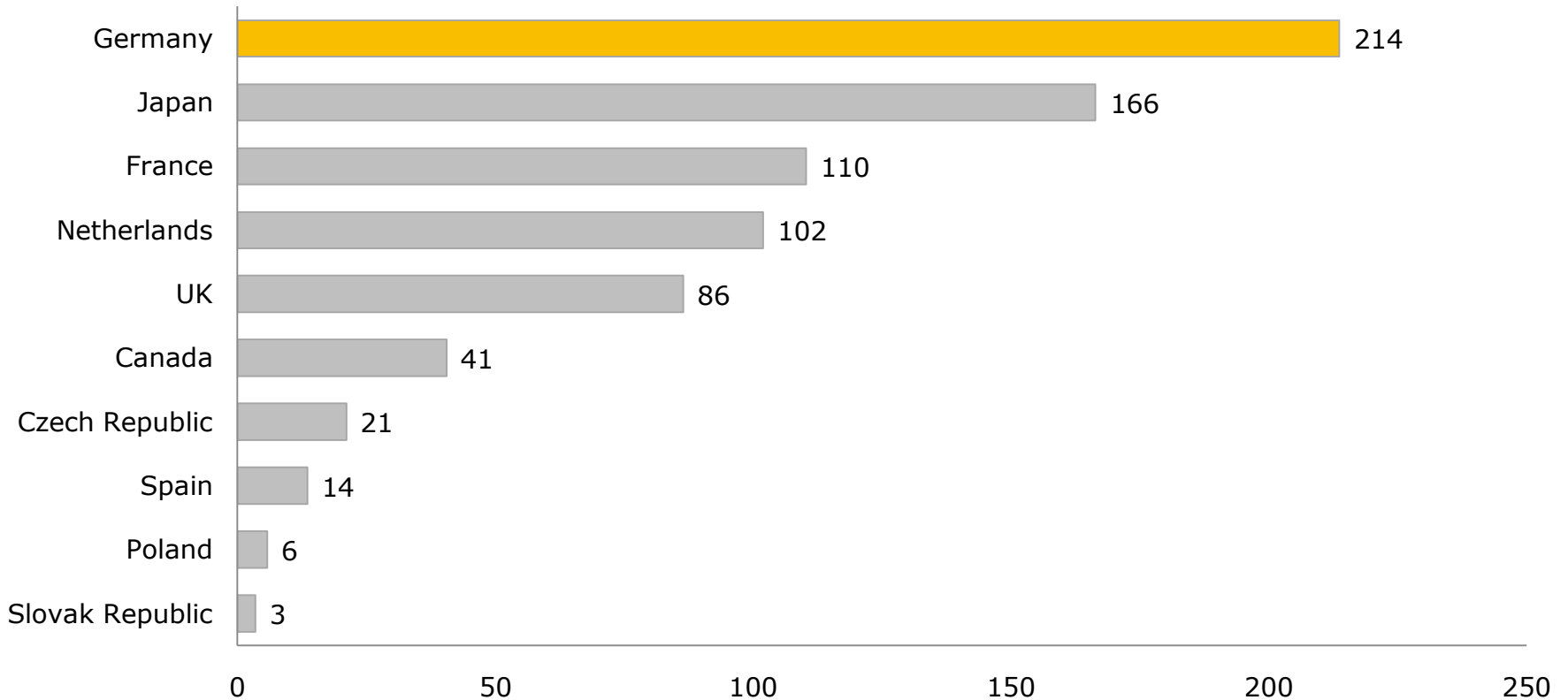


Source: OECD Science, Technology and Industry Scoreboard 2007

# High-Tech Exports

Germany's high-tech exports rank first in Europe.

Hightech Exports (2007, in bn EUR)

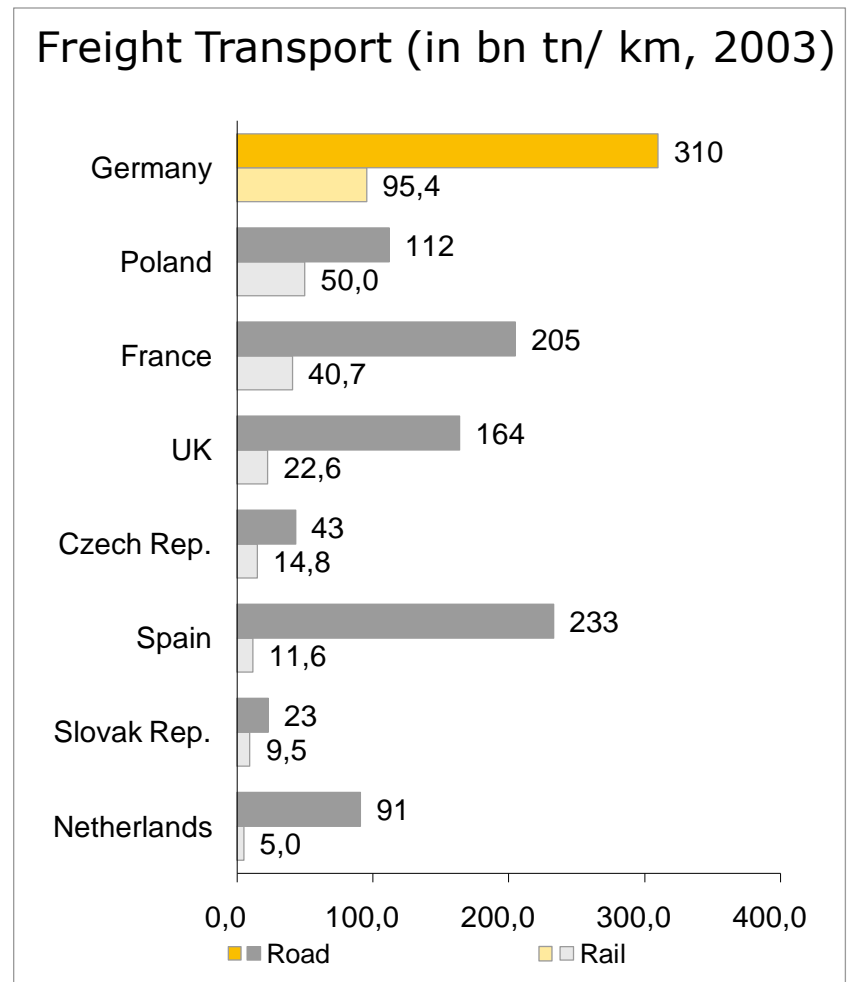
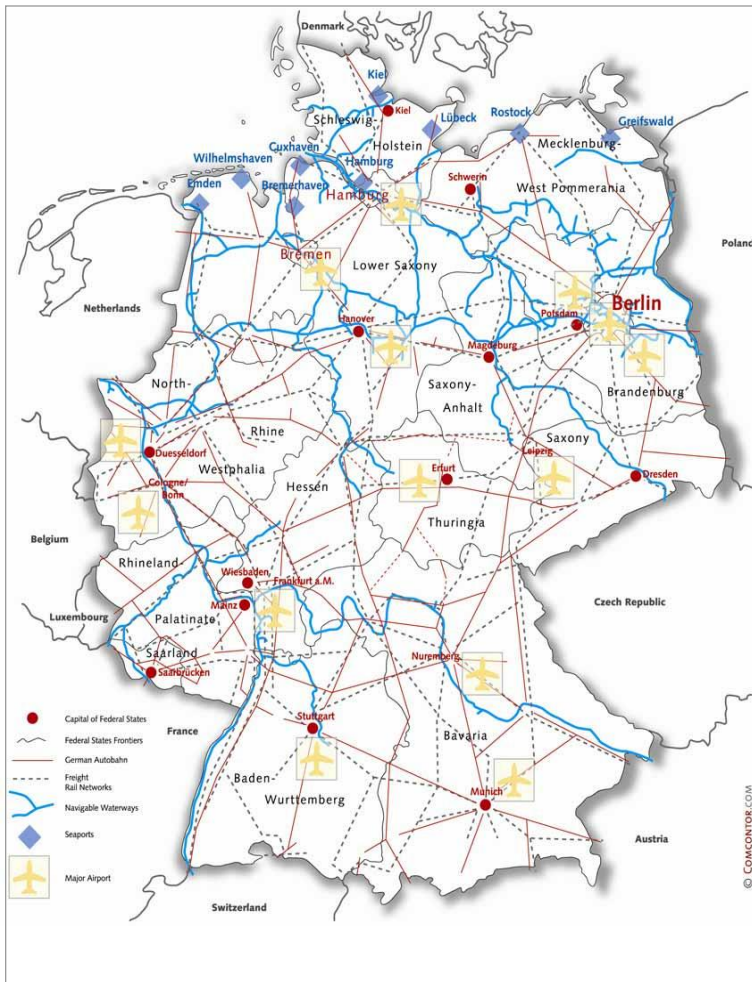


Source: World Bank 2008



# Germany – First Class Infrastructure

Germany's highly advanced infrastructure is second to none.

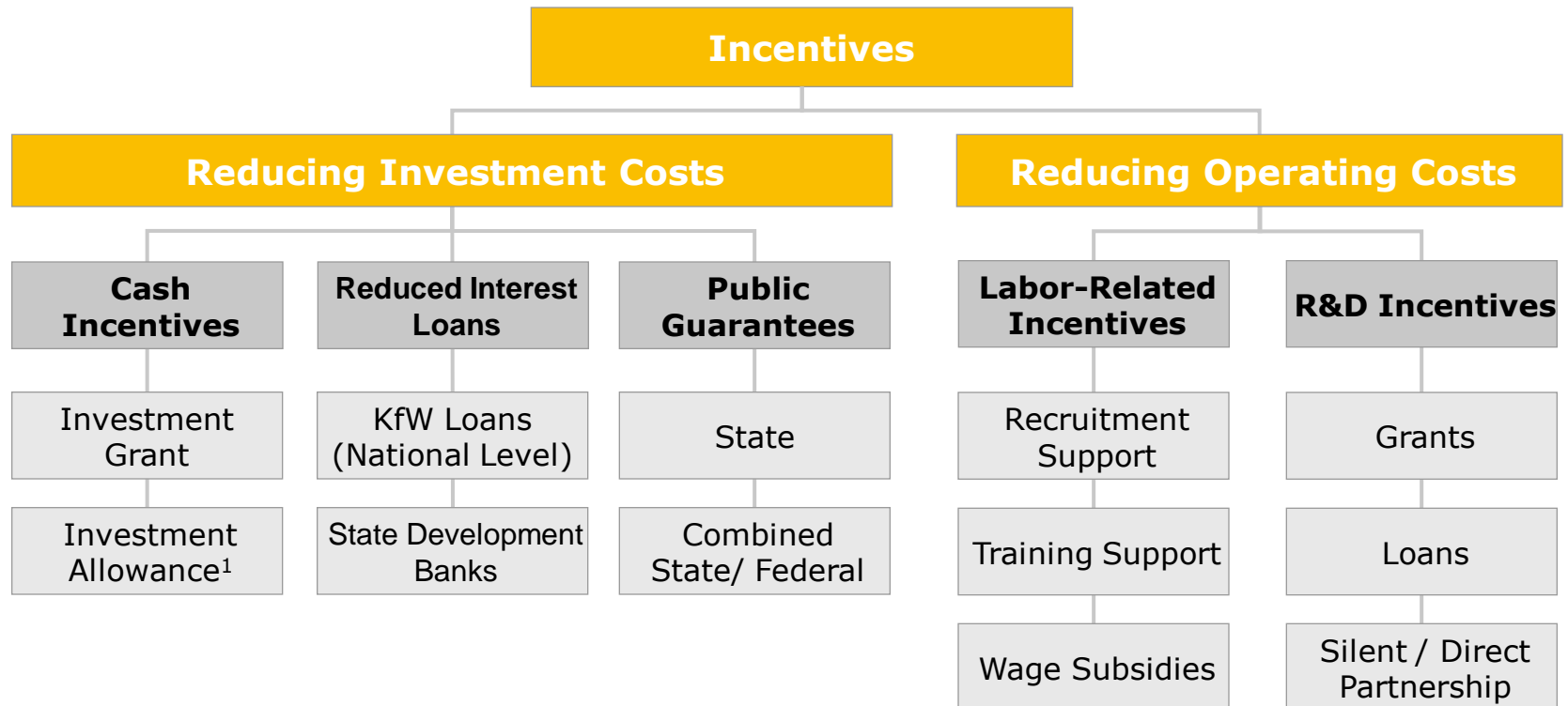


Source: Eurostat, "Comcontor.com" 2005, Federal Statistical Office, OECD, Allianz Dresdner Economic Research 2007

# Germany - Appealing Incentives

Germany offers various incentive packages to reimburse investment projects' expenditures.

## Incentives Available to Investment Projects in Germany



Note: <sup>1</sup> only available to investments in eastern Germany

# Investment Incentives Package - Cash Incentives







The main instrument to lower direct investment costs is cash incentives in form of **direct grants**. Additionally, Eastern Germany offers **investment allowance**.

	Investment Grants	Investment Allowance
<b>Offered in</b>	<ul style="list-style-type: none"> <li>Specific regions throughout Germany</li> </ul>	<ul style="list-style-type: none"> <li>Eastern Germany</li> </ul>
<b>Offered as a</b>	<ul style="list-style-type: none"> <li>Cash payment calculated on the eligible project costs</li> </ul>	<ul style="list-style-type: none"> <li>Cash payment and/ or tax reduction calculated on the eligible project costs</li> </ul>
<b>Eligible project costs are the</b>	<ul style="list-style-type: none"> <li>Purchase or production costs of buildings, machinery, and equipment and purchase cost of intangible assets <u>or</u> wage costs for two years</li> </ul>	<ul style="list-style-type: none"> <li>Purchase or production costs of buildings, machinery, and equipment</li> </ul>
<b>The target is</b>	<ul style="list-style-type: none"> <li>Job creation</li> </ul>	<ul style="list-style-type: none"> <li>Boosting investments in Eastern Germany</li> </ul>
<b>Requirement</b>	<ul style="list-style-type: none"> <li>The investment project must create long-term jobs.</li> <li>The equipment subsidized through the grant must remain at the location for at least five years.</li> </ul>	<ul style="list-style-type: none"> <li>The equipment subsidized through the allowance must remain at the location for at least five years.</li> </ul>
<b>Important remark</b>	<ul style="list-style-type: none"> <li>The investment allowance is complementary to investment grants <u>only</u> in Eastern Germany.</li> </ul>	

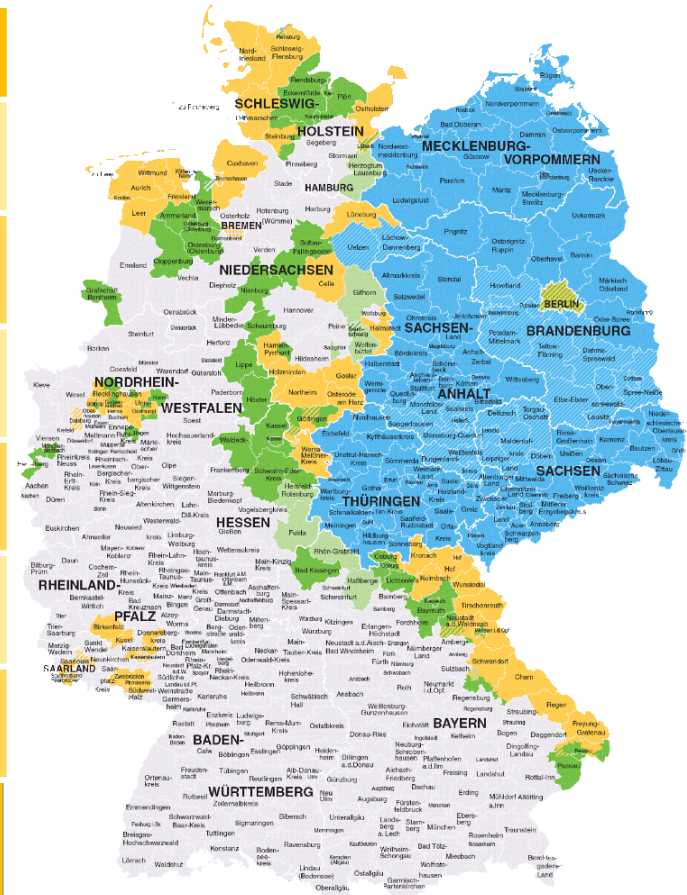
The availability of investment grants and allowances must be checked for each project. Possible incentive levels and amounts must be calculated individually based on the project's data.

# Investment Incentives Package – Cash Incentives

To reduce capital expenditures, Eastern Germany offers **investment grants** of up to 50 percent for investors, depending on the region and the company size

	Small companies <sup>1</sup>	Medium-sized companies <sup>2</sup>	Large companies
 <b>A Region<sup>3</sup></b>	50%	40%	30%
 <b>A Region in transition<sup>4</sup></b>	50% (until end 2010) 40% (from 2011 on)	40% (until end 2010) 30% (from 2011 on)	30% (until end 2010) 20% (from 2011 on)
 <b>C Region</b>	35 %	25%	15%
 <b>D Region</b>	15%	7.5%	7.5% but max. EUR 200,000 <sup>5</sup>
 <b>C/D Region</b>	35% / 15%	25% / 7.5%	15 % / 7.5% but max. EUR 200,000 <sup>5</sup>
 <b>E Region</b>	No investment area, special relocation regulations		

The bonus of 20% for a small company and of 10% for a medium-sized enterprise is not granted to large investment projects with eligible investment costs above EUR 50 million. Projects with eligible investment costs above EUR 50 million receive only a progressively reduced incentive level.



Source: 36th GA Framework Plan  
“Improving the Regional Economic Structure”

<sup>1</sup> Includes a bonus of 20%, <sup>2</sup> Includes a bonus of 10%, <sup>3</sup> Lower level of incentives provided in Dresden and Leipzig, <sup>4</sup> The areas of south-west Brandenburg, Halle, Leipzig, Lüchow-Dannenberg and Uelzen will be reviewed by the EU Commission in 2010 and could be reduced to lower level from 2011 on, <sup>5</sup> “De-minimis-rule”

The **interest-reduced loans** and **guarantees** are options to close the financial package for the investment project.

**Interest-reduced loan programs** are available at different levels.

Company Size Source of loan	Small	Medium-sized	Large
<b>National level</b>	<p><b><u>Entrepreneur loan:</u></b></p> <ul style="list-style-type: none"> <li>Max. amount EUR 10 million</li> <li>For financing of investment costs and working capital</li> </ul>		
<b>Regional level</b>	<p><b><u>State development bank loans:</u></b></p> <ul style="list-style-type: none"> <li>Amount EUR 750,000 – EUR 10 million</li> <li>For financing of investment costs and working capital</li> </ul>		Not available

**Public guarantees** are assumed for easing of investment loans lent by commercial banks.

<b>Regional level</b>	<ul style="list-style-type: none"> <li>Available throughout Germany</li> <li>For guarantee amounts up to EUR 10 million</li> <li>Guarantee covers up to 80% of the loan amount</li> </ul>
<b>Combined national – regional level</b>	<ul style="list-style-type: none"> <li>Available in Eastern Germany and parts of Berlin</li> <li>For guarantee amounts exceeding EUR 10 million</li> <li>Guarantee covers up to 80% of the loan amount</li> </ul>

Guarantees lower cash incentives. For calculating the aid element of guarantees the EU implemented a method based on parameters such as default probabilities, recovery rate and guarantee fees.

# Investment Incentives Package - Labor-Related Incentives

In addition to the investment incentives package, **labor-related incentives** as a part of the operational incentive package, effectively reduce operational costs.

	Recruitment Support	Training Support	Wage Subsidies	On-the-Job Training
General Conditions	<ul style="list-style-type: none"> <li>For organization and/or support of recruitment process by local Employment Agency</li> <li>Assessment center by training agencies</li> </ul>	<ul style="list-style-type: none"> <li>For organization of qualification courses for unemployed candidates by Employment Agency in close cooperation with investor</li> <li>No binding work contracts required</li> </ul>	<ul style="list-style-type: none"> <li>For employment of formerly long-term unemployed candidates or unemployed individuals under 25 years</li> <li>Company has to provide work contract with a minimum of 15h per week</li> </ul>	<ul style="list-style-type: none"> <li>For all employees</li> <li>Financed by the European Social Fund (ESF)</li> <li>EU notification required for grants exceeding EUR 2 million per company</li> </ul>
Eligible Costs	<ul style="list-style-type: none"> <li>Costs for job adverts, screening and pre-selection of applicants</li> <li>Costs for assessment center</li> </ul>	<ul style="list-style-type: none"> <li>Labor costs of trainees</li> <li>Costs for training courses</li> </ul>	<ul style="list-style-type: none"> <li>Wage costs</li> <li>Social benefits</li> </ul>	<ul style="list-style-type: none"> <li>Costs for qualification courses</li> </ul>
Amount	<ul style="list-style-type: none"> <li>Up to 100% of eligible costs, depending on budget of local employment agency</li> </ul>	<ul style="list-style-type: none"> <li>Up to 100% of eligible costs for a training period of up to three months</li> </ul>	<ul style="list-style-type: none"> <li>Normally up to 50% of eligible costs for up to twelve months</li> </ul>	<ul style="list-style-type: none"> <li>Up to 50% of eligible costs</li> </ul>



# High-Class R&D Incentives Programs

An outstanding high-tech infrastructure combined with a dense network of incentive programs forms the backbone for high-class R&D in Germany.

## Infrastructure

- Highly qualified labor market: 500,000 R&D employees in institutions, universities, and industry.
- High density of renowned research institutions and 383 universities.
- Platform for innovative and competitive products, processes, and services: EUR 428 billion in exports of research intensive goods.
- Research and knowledge-driven sectors account for 39% of the nation's gross value added.

## Incentives

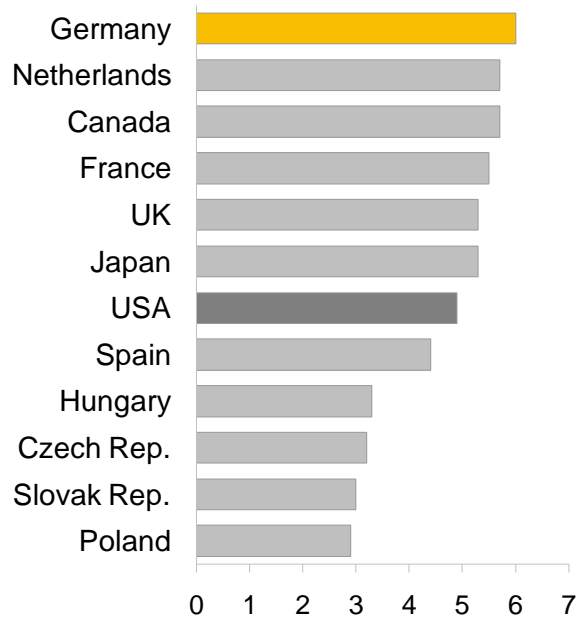
- Many R&D incentive programs in the form of grants, loans, or guarantees designed for specific topics.
- Program budgets are provided by the European Union, by the national government, and by each individual state.
- Re-application for R&D programs is possible allowing multiple funding opportunities.
- Nationwide full service advisory centers guarantee efficient application procedures.

# Secure Investment Environment

Germany's stable business environment provides a solid base for investment projects.

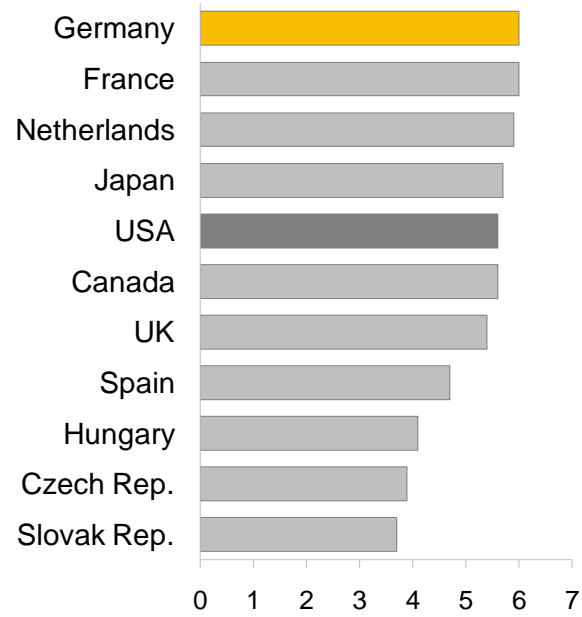
## Assesment of Planning Security (2008/2009, Opinion Survey)

### Efficiency of Legal System



(7 = efficient with clear, neutral processes; 1 = inefficient)

### Security of Intellectual Property



(7 = equal to the world's most stringent; 1 = weak or nonexistent)



Germany is known for its straight and efficient business environment, but has a lot more to offer besides ideal investment conditions.

## Scenic Attractions

2,389 km of beautiful coastline, 20 mountain ranges, 125 natural landscape protection areas and 10,200 km of bicycle tracks to ride through all of it



## Cultural Devotion

80 operas, world renowned symphonic orchestras, 5,600 museums and over 550 annual classical festivals attracting million of people

## Hearty Cuisine

1,250 breweries with more than 5,000 different kinds of beer along with sausages and more than 300 different kinds of bread



## Recreational Activities

12,000 km of German Autobahn alongside Porsche, BMW, Mercedes and Audi, luxury vehicle manufacturers all situated in Germany

## Sporting Enthusiasm

26,000 soccer clubs with 6.3 million active players, 1.8 million active tennis players and 646 golf courses



## Living History

More than 700 medieval castles and magnificent palaces, the longest castle wall within Europe and cities with chronicles reaching back to Roman times

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# Which industries offer enduring economic perspectives to Eastern Germany?\*

## Which industries offer enduring economic perspectives to Germany's New Laender?\*

Well-established industries experience an increase in demand due to social and economic trends

- Energy & Ecological Technologies
- Health Management and Medical Technologies
- Information and Communication Technologies (incl. Microsystems Engineering and Electronics)
- Maritime Technologies
- Production Technologies
- Logistics
- Service Industries
- Automotive Engineering

## Research-intensive industries

- Biotechnologies
- Nanotechnologies
- Optical Technologies

\*Quelle HIERO 2008

Fast growing sectors in the market for renewable energies formed a new picture of Germany.



## Photovoltaics

Germany is the largest PV-market in the world and disposes of one of the most innovative R&D networks.



## Solar Thermal Energy

Germany is the largest market for solar thermal energy in Europe and the second largest in the World.



## Energy Efficiency

Germany is one of the leading markets worldwide in the field of energy efficiency – especially for buildings



## Geothermal Energy

The German market for geothermal energy is one of the most dynamic of the World – estimated to decuple by 2012.



## Renewable Resources & Bioenergy

Germany has the largest European market for bio-chemicals and is the leading producer of biofuels.



## Wind Energy

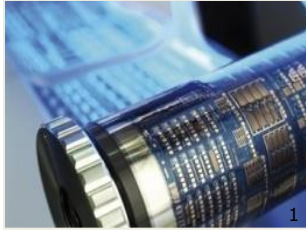
Germany disposes of the largest installed wind energy capacity in the World. The future lies in field of off-shore wind energy.



## Energy Storage & Fuel Cells

Germany is the No. 1 market for fuel cells in the EU.

Mechanical and electronic technologies represent 50 percent of all exports and more than 34 percent of all foreign direct investment in Germany.



## Electronics

With a market share of over 35 percent, German semiconductors dominate the European market.



## Automotive Industry

Germany offers the biggest market potential and is home to an excellent highly-skilled labor force.



## Machinery & Equipment

Germany is the world's leading exporter and reaches a global market share of 19 percent.



## Aerospace Industry

With an average growth of 9 percent the German aerospace industry is one of the most dynamic industry sectors.



## Maritime Technologies

The German shipbuilding industry has a globally leading technological position and its suppliers are among the world's export champions.



Market size and innovation potential within the German services and consumer goods markets offer vast potential for investors.



## Information & Communications Technology (ICT)

Germany's ICT and E-Commerce industries are market leaders in Europe with sales of EUR 146 billion (ICT) and EUR 438.7 billion (E-Commerce) respectively.



## Consumer Goods/Retail

Europe's largest consumer market with more than 82 million consumers and private spending on consumer goods totaling total EUR 363.6 billion.



## Business Services

Annual employee growth in Germany's contact center at over 15 percent; over 6,000 service centers with more than 450,000 agents.



## Food & Beverages

With an annual turnover of EUR 147 billion, Germany is Europe's largest food and beverage producer. Current growth segments include convenience, organic, and functional food products.



## Transportation & Logistics

Annual growth rate of around 8.5 percent with a total turnover of EUR 204 billion in 2007; easy access to all European markets thanks to favorable central location in Europe.



## Tourism & Leisure

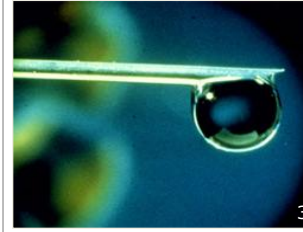
129.9 million tourists traveled to Germany in 2007, with 361.8 million registered overnight stays. The number of overnight stays is increasing steadily.

Germany provides foreign investors with an attractive general framework in the chemical and healthcare industry.



## Chemical Industry and Polymers

Germany is the biggest market for chemical products in Europe. Investors benefit from a unique chemical park concept with a range of services and professional management.



## Red Biotech

With nearly 500 “dedicated” biotechnology firms Germany is home to more biotech companies than any other country in Europe. Between 2000 – 2004, 30% of all worldwide bio patent applications at the Patent office in Munich came from Germany.



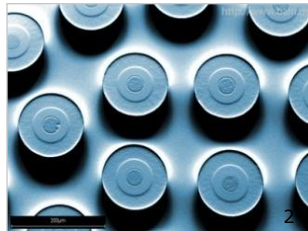
## Chemicals-Related Process Industry (e.g. paper and glass/ceramic industry)

The paper industry is number one in terms of production in Europe. After the USA, China, Japan and Canada it ranks fifth in the world.



## Medical Devices Industry

Germany is the third largest market for medical devices worldwide and leading in Europe. Competitive advantage: decade long experience in the art of engineering, creativity and enthusiasm for innovation.



## New Materials/ Composite Materials

Composite materials and composite material systems have gained in importance. There is an increasing demand for light, low-abrasive and temperature-resistant polymers, metals and ceramics.



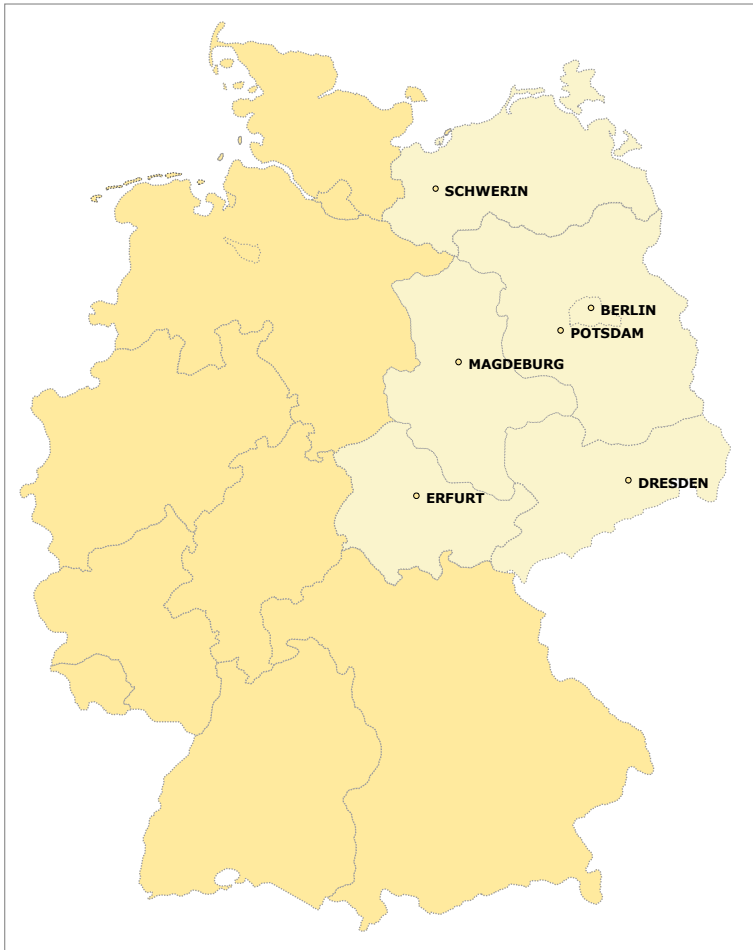
## Pharmaceuticals Industry

Germany is Europe’s largest single market for pharmaceuticals. The market is attractive due to Germany’s stable and broad health system. Furthermore, Germany is open to both innovation and low-priced providers.

Source: <sup>1</sup>Gustavo Alabiso/ Visum, Papierfabrik Palm, [www.igbce.de](http://www.igbce.de), <sup>2</sup>[www.bam.de](http://www.bam.de), <sup>3</sup>VfA © Lilly Pharma; <sup>4</sup>BVmed © B.Braun Melsungen AG; <sup>5</sup>VfA © Takeda Pharma

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**Thank you for your attention.**