

UKTI Germany

UK Trade & Investment
British Consulate-General Munich
Heike Bieber

UK Trade & Investment in Germany

- **2 Consulates-General: Düsseldorf (UKTI HQ in Germany) and Munich**
- **British Embassy in Berlin**
- Teams with 9 Trade Officers and 4 Investment Officers in Germany



Trade Objectives and Activities

- Help UK companies to enter the German market successfully
 - Help established UK companies to expand their business in Germany
 - Promote Britain as an innovative business partner
 - Raise the profile of the UK as an important trading partner of Germany
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Munich

- Automotive
 - ICT
 - Electronics
 - Engineering
 - Aerospace
 - Public-Private Partnerships
 - Financial Services
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Düsseldorf

- Food and Drink
 - Fashion
 - Education & Training
 - Creative and Media (incl. Computer Games)
 - Healthcare & Medical
 - Biotech/Pharmaceuticals, Chemicals
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Berlin

- Transport (Airports, Railways, Ports, Logistics)
 - Defence and Military Equipment
 - Construction
 - Security (Fire & Police)
 - Environment
 - Oil and Gas
 - Agriculture; Water
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German Regions

- **Germany North**
- **Germany Central**
- **Germany South**

Service Level

- North/Central/South Germany only - service levels:
£490, £980, £1470, £1960 etc
 - Any two regions - double service level 2 x £490/980/etc
 - All three regions - triple service level 3 x £490/980/etc
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Economic Ties

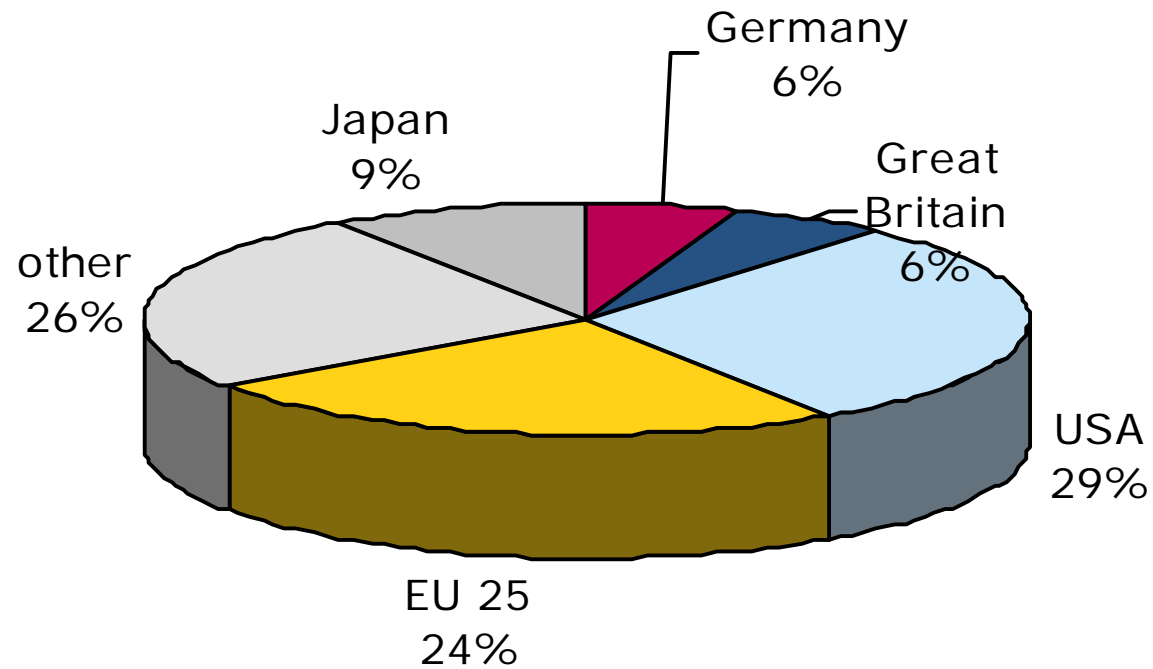
- Germany is Britain's second biggest export market.
Value approx. £44 billion in 2008.
- Britain is Germany's third biggest export market.
Value approx. £67 billion in 2008.

Source: HRMC, Landesamt fuer Statistik NRW

British Companies in Germany

- Vodafone
 - BT
 - Sage
 - Royal Bank of Scotland (RBS)
 - BP
 - Plastic Logic
 - Ascari
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World ICT Market 2009



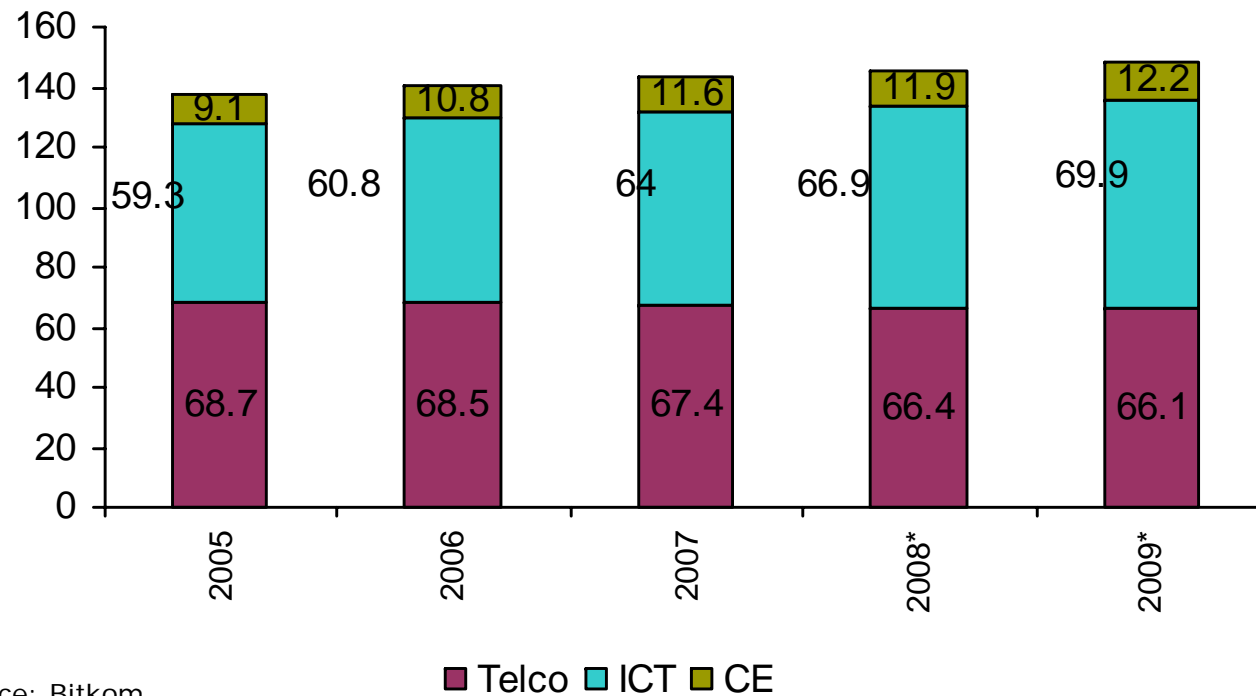
Germany - Background

- The German ICT market: competitive and highly developed
 - Worldwide operating software giants such as SAP, Microsoft, Sage, Oracle, etc,
 - SME's, "Mittelstand"
 - System integrators and resellers. Adding value, adapting, implementing or selling the products of the OEMs.
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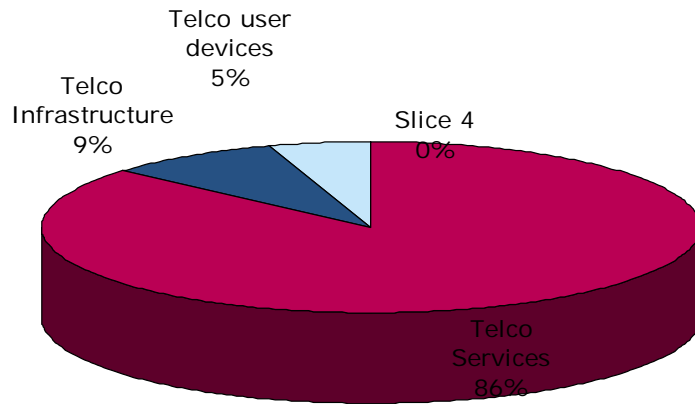
German ICT Market

- highly competitive
 - elaborate
 - find information about regulations (e.g. certificates, security)
 - require detailed information
 - high-quality trade literature
 - German website/ trade literature
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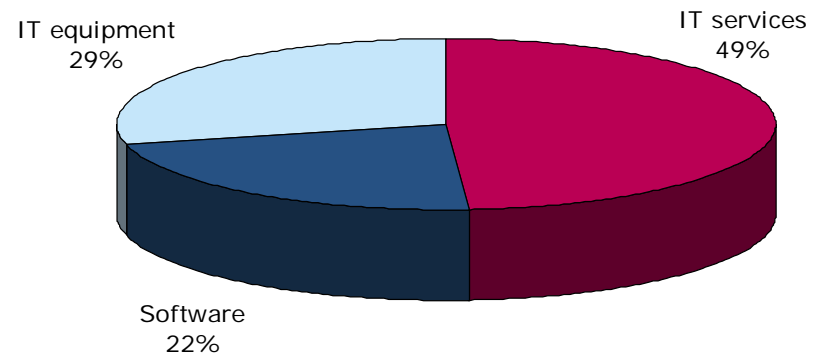
The German ICT Market



German ICT Market by Sectors



Telecommunications



Information Technology

Source: Infratest

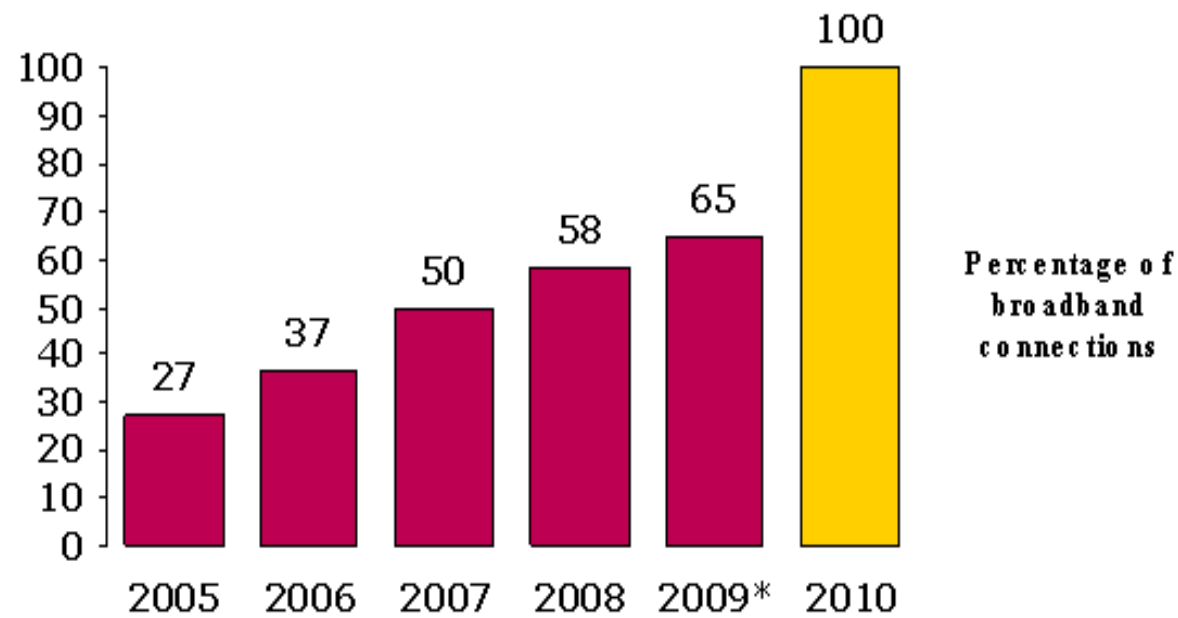
Germany –Key Facts

- Germany is the fourth largest ICT market in the world after the US, Japan and the UK.
 - Germany's export of ICT products amounted to €37bn in 2008.
 - German ICT market volume will amount to €148bn in 2009, 5.6% of world market share.
 - Around 33.000 companies are active in the German IT Sector, employing 816,000 individuals.
 - The German software company SAP is the world's largest provider of business applications. 80% of the Fortune Global 1000 companies run SAP software.
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Germany –Key Facts

- 52m Germans are active internet users, 62% of these use broadband infrastructure.
 - Germany is Europe's No1 B2B and B2C eCommerce nation, with a turnover of €3.3 bn. 13m Germans sell products in the Internet. 60% of companies purchase their materials online.
 - Mobile internet is booming in Germany. Nearly 16m UMTS mobile phones were used in 2008.
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German broadband connections and strategy target



Source Bitkom, Eurostat

Germany –Key Facts

- Germany hosts over 150 ICT related trade fairs and congresses.
- 2/3 of the world's main international trade fairs are held in Germany.
- CeBIT trade fair in Hanover is the world's largest ICT trade show.



02 - 06 March 2010

Other IT Trade Fairs

Intergeo	Geodesy, Geoinformation and Landmanagement
Optatec	Future Optical Technologies, Components, Systems and Manufacturing
DMS	Enterprise Content and Document Management Solution
Vision	Machine Vision and Identification Technologies
Interop	Infrastructure & Services, IP Communications, Wireless & Mobility, Data Center & Server Systems, RFID
Embedded World	Embedded Software
IFA	Consumer Electronics

Germany –Key Facts

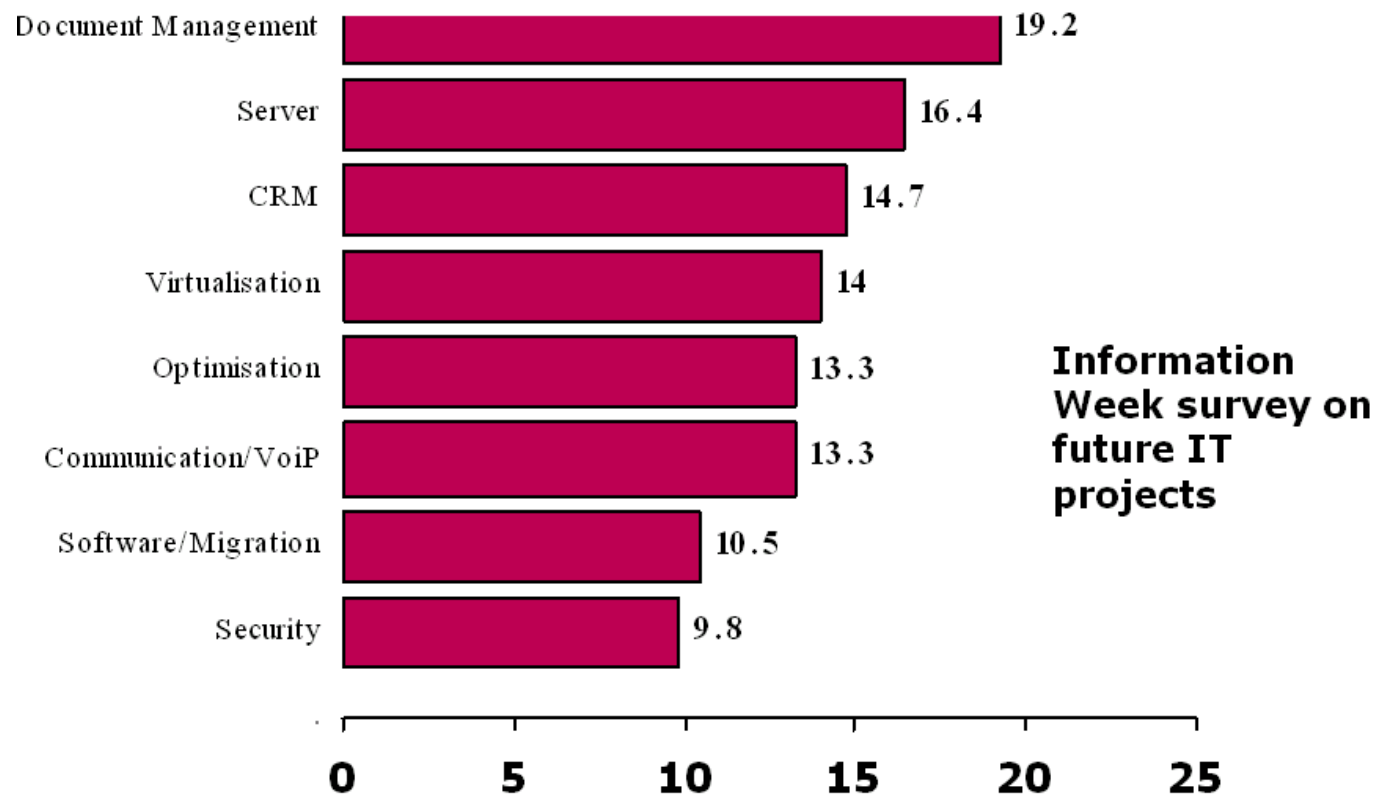
- The electronics sector is the most innovative sector in Germany, with 8000 patents, a volume of €165 bn and a leading role in the RFID industry.
 - 1.800 patents in 2007 show the high degree of innovation in Germany's ICT industry – surpassed only by the USA and Japan.
 - The Fraunhofer Society is Europe's largest ICT research institute.
 - All major ICT manufacturers operate R&D laboratories in Germany.
 - The region Dresden is the leading location for microelectronics in Europe and worldwide ranks fifth. Every second European chip is produced in the area.
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ICT Clusters in Germany

*ICT clusters in
Germany*



Trends



**Information
Week survey on
future IT
projects**

Forthcoming IT projects in %- Source InformationWeek

Good opportunities

Especially if you:

- are able to offer high-end technology
 - adapt the product to the German market (language, regulatory standards, business culture pricing)
 - offer high margins
 - have detailed plans on how to enter the market
 - are aware of which type of companies (even better: which companies) to partner with
 - focus on products in niche segments
 - emphasise their unique selling points
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How to enter the German market

- Be active in the market and learn how it works
 - Visit the market regularly
 - Background information for Germany
 - Analysis of market, competitors, pricing, demand, quality / legal requirements, etc.
 - Know the culture
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Cultural tendencies in business

- Germans have a reputation for being thorough, exact and direct
⇒ clear, direct communication, concise presentation important
 - Germans are direct in expressing views and opinions
(no hidden language or reading between the lines)
 - Formal and business culture (language and dress code)
 - Forward thinking / Anticipation of potential problems
 - What is being said will be taken seriously, promises made are held and small talk is withheld
 - Germans are impressed with quality, reliability and reputation - they aim for long-term business relationships!
 - German and British sense of humour!
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Doing Business with Germans

- Straight to the point
 - German (trade literature + contact)
 - Know Your Product
 - Professional Approach
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UKTI - Market Research

- Market information, competitors, market approach
 - Customised local contact list
 - Identification and assessment of potential agents/distributors or customers
 - Market assessments for your product or service
 - In-market support
 - Support at trade shows
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In-Market Support

- Counselling/mentoring
- Visits briefing
- Meeting customers at trade fairs
- Setting up selected appointments
- Assistance with organising promotional events
- Accompanying customers on visits to potential contacts



Useful websites



www.uktradeinvest.gov.uk

General Information

www.auma.de

Association of the German Trade Fair Industry

www.wlw.de

Search-Find-Buy in Europe

ICT

www.bitkom.de

Federal German Association for Information Technology, Telecommunications and New Media

www.breko.de

Federal Association for Broadband Communications

www.bundesnetzagentur.de Regulator for Electricity, Gas and Telecommunications

Doing Business in Germany

www.bmwi.de

Ministry of Economics and Labour

www.dihk.de

German Chamber of Industry and Commerce

www.bundesregierung.de Portal of the German Government

www.hrs.de

Hotel Reservation Service Germany wide

Thank you for your attention

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