

Where Expanding Markets and Next Generation Technologies Meet

Category	Name	Location	Expertise
Cluster & Initiatives	1 Cool Silicon	Saxony	Energy Efficiency
	2 E-DeMa	Ruhr Area	SmartMetering
	3 eTelligence	Cuxhaven	Market place for Electricity
	4 MEREGIO	Baden	Energy Efficiency
	5 Mannheim model city	Rhine-Neckar	Broadband powerline infrastructure
	6 RegModHarz	Harz	Renewable Energy
	7 SmartW@TTS	Aachen	Energy Efficiency
	8 Project Office Green IT	Berlin	Green IT Consulting
R&D	9 OFFIS e.V. - Oldenburger Institute for Informatics	Oldenburg	IT Systems
	10 German Research Center for Artificial Intelligence	Bremen	Artificial-Intelligence Research
	11 Borderstep Institute for Innovation and Sustainability	Berlin	Innovation and Sustainability
	12 German Research Foundation (DFG)	Bonn	Research Promotion at Public Institutions
	13 Fraunhofer Institute for Systems and Innovation Research ISI	Karlsruhe	Systems and Innovation Research
	14 Institute for Automation und Communication (ifak)	Magdeburg	Control and automation Technology
	15 The German Institute for Economic Research (DIW)	Berlin	Largest Economic Research Institute
	16 Fraunhofer Institut für Umwelt-, Sicherheit-, Energietechnik UMSICHT	Oberhausen	Technology Development
	17 Fraunhofer IZM Assembly and Packaging Techn.	Berlin	Microsystems
	18 University of Duisburg-Essen	Duisburg	Energy Efficiency & Renewable Technology
	19 ISET - Verein an der Universität Kassel e.V.	Kassel	Energy Efficiency & Renewable Technology
	20 TU Chemnitz	Chemnitz	Energy Efficiency & Renewable Technology
	21 TU Dresden	Dresden	Energy Efficiency & Renewable Technology
Associations	22 Federal Association of Innovative companies	Berlin	Innovation
	23 BITKOM - Federal Association for Information Technology, Telecommunications and New Media	Berlin	ICT and New Media
	24 Federal Association for Electrical, Electronic & Information Technologies	Frankfurt	Electrical, Electronic & Information Technologies
	25 GfAI - Society for the Promotion of Applied Computer Science	Berlin	Applied Computer Science
Companies	26 Alcatel-Lucent Deutschland AG	Stuttgart	Communication
	27 bit GmbH	Karlsruhe	Data Centre
	28 Hitex Development Tools	Karlsruhe	IT Hardware, Software and Consulting
	29 e-shelter facility services GmbH	Frankfurt	Data Centre
	30 Fujitsu Technology Solutions	Munich	IT Hardware
	31 IBM Deutschland GmbH	Stuttgart	Software & IT Solutions
	32 Power Plus Communications AG	Mannheim	Broadband powerline communication systems
	33 Siemens IT Solutions and Services	Berlin	IT Solutions & Services
	34 STRATO AG	Berlin	Webhosting
	35 Sun Microsystems GmbH	Kirchheim	Hardware, Software & Services
	36 AUCOTEAM GmbH	Berlin	Automation Technology
	37 Systemplan GmbH	Durmersheim	Energy Consumption Reduction
	38 ProSystem AG	Cologne	OSGi and Java
39 BTC Business Technology Consulting AG	Oldenburg	System integration and System management	
40 LinTech GmbH	Berlin	Communication Technology	
41 SYMACON GmbH	Barleben	Handling & Assembly technique	
42 Plastic Logic	Dresden	Flexible Displays	
43 VAD Video-Audio-Design GmbH	Dresden	Video- Audio- Design	



This list is not intended to be exhaustive. Source: Germany Trade & Invest, November 2009

The Industry in Numbers

ICT research and consultancy specialists Experton predict an annual average growth of 51 percent by the year 2011 for the green IT (hardware, software and services) sector in Germany.

In 2009, Germany's green IT industry will generate a market volume of EUR 4.5 billion (USD 6.6 billion).

Experts highlight the special need for consultancy services in the field of energy efficiency management. These services have a current market value of EUR 1.31 billion (USD 1.9 billion). This figure is forecast to increase to EUR 3.8 billion (USD 5.6 billion) in 2010.

Market volume of the green IT software industry (server virtualization, multi user systems, etc.) is expected to increase from EUR 810 million (USD 1.19 billion) in 2009 to EUR 1.8 billion (USD 2.6 billion) in 2010.

The Market

Germany has a leading position in the green information technology (IT) segment. The German government aims to reduce IT energy consumption levels by 40 percent until 2013. Legislation like the EnEV helps promote the use of energy-efficient products.

According to the Borderstep Institute, data centers in Germany use 10 TWh electricity - equivalent to 25 percent of total data center electricity consumption in Europe. This has to be reduced, while in the meantime the use of IT will steadily increase.

The private and public sector has accordingly initiated several projects. German ICT association BITKOM has launched a green IT hotline and consulting service to advise users about the best available "green through IT" innovations. The German government has launched several green IT projects including E-Energy, energy efficiency in data centers, the expansion of clusters (i.e. "Cool Silicon") and a program for the improvement of state-owned data centers. In total, incentives of more than EUR 400 million will be spent on "greening" in the coming years.

Strong application markets push industry growth and initiate new trends

Investment Areas

Germany's expertise in electronic device production, software development and new high-tech materials - all essential elements of green IT - make Germany a leading location for green IT investments.

ICT infrastructure energy costs have become a significant economic factor in the equation. As such, the most urgent challenge in the area of micro and nanotechnology is to significantly increase energy efficiency - specifically in the area of IT as a key economic growth sector.

Consequently, the field of IT energy efficiency will be a high potential segment in Germany. Internationally unique clusters like "Cool Silicon" underpin German R&D leadership and stimulate the interest of high-tech companies.

One fast-growing energy efficiency market is lighting and lighting management.

As the leading country in the field of automotive research, German car manufacturers are already using LED technology to replace conventional taillights. German experts are confident that OLED will be used for large-scale lighting systems in homes and offices by 2014. They may even replace windows, remaining transparent during the day and gradually illuminating as the sun sets.

Advantages

The advantages of setting up your business in Germany:

- Pioneering energy efficiency technologies
- World-leading machinery and equipment suppliers
- First-class electronic device manufacturers
- Rapidly expanding application markets
- Favorable mix of regulations and guidelines
- Governmental investment and R&D support

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Our services:

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- Site selection support
- Financing and incentive consultancy
- Project management

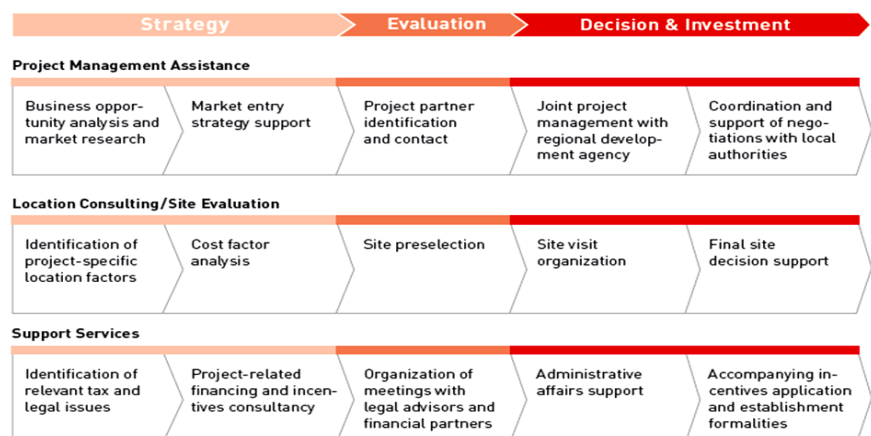
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