Economic Development
City of Düsseldorf

Düsseldorf
Sector profile
Information technology and telecommunications

Welcome to the digital city!

The list of ICT companies operating from Düsseldorf reads like the global Who's Who of the information and communications industry.

Düsseldorf is Germany's leading telecommunications centre.

Information and communication technology is one of the world's most dynamic growth markets.

Companies in the information and communication technology (ICT) industry play a leading role in shaping Düsseldorf's economy. For many years now, the city has been one of Germany's top business locations for the gamut of ICT sectors, including IT (software, hardware, IT-related services) and telecommunications (call centres, network carries, ISPs and Web-based services as well as equipment providers and manufacturers). Currently planning the construction of a 80,000 m² Vodafone Campus facility in the Oberkassel district. Other major players with a base in Düsseldorf include Alcatel-Lucent Network Services, Hewlett-Packard, Nokia Siemens Network, Tata, Ericsson, Deutsche Telekom, COLT Telecom, IBM, Siemens, Oracle, Novell, NEC, Cisco, Huawei Technologies and Research in Motion … to name but a few!

In Düsseldorf, global telecoms corporations meet IT innovators and agile service providers that offer client-specific solutions for mass market applications.

some 1,500 industry specialists are based here that employ over 24,000 people. Düsseldorf is home to 33 network carriers and communication service providers, and especially the share of mobile data services is constantly on the rise.

Thanks to a targeted settlement policy for ICT companies, Düsseldorf has been able to continually build up its information and communication technology cluster. Synergy effects continue to attract ever more enterprises.

Renowned national and international corporations along with innovative start-ups underline Düsseldorf's importance as a top technology location. Mobile operator E-Plus, for instance, has recently moved to its newly constructed German headquarters with capacity for 1,000 employees, while Vodafone is currently

Many of Düsseldorf's ICT enterprises are active participants in the 'Digital City Düsseldorf' industry network, an initiative launched by the state capital's government to vigorously drive expansion of the ITC industry cluster in Düsseldorf.

The present 'Sector profile: Information technology and telecommunications' provides you with an overview of the current situation. It is based on data collected in a Sector Survey carried out by the Office of Economic Development. Placing special focus on data service provision and data service applications, the survey documents Düsseldorf's outstanding position in the domain of information and communication technologies.

ICT market overview

Germany is one of the leading ICT nations in Europe. Düsseldorf has always played a pivotal role.

Germany and the world

The world's major ICT markets in 2008 remain the USA, with a 29% share of total sales, followed by Japan (approx. 14%) and Great Britain (just under 6%). With a 5.5 percent share of total sales, Germany is the fourth largest player in the global ICT market. However, with a total sector workforce of over 1 million, it employs around 65,000 people more than Great Britain (source: BITKOM).

Especially mobile data services are currently experiencing a veritable boom. Sales are expected to reach around €36 billion by 2010. BITKOM research determined that Great Britain commanded the largest market volume at€5.6 billion in 2009 while Germany held second place at €5.2 billion, followed by Italy (just under €5.2 billion) and France (€4.0 billion). Spain, Europe's fifth largest sales market, has a share of €3.2 billion, while the strongest growth in the mobile data services sector has been seen in Italy (12% in 2009).

Germany is Europe's second largest mobile data services market

In Germany, income from mobile Internet access and mobile e-mail now exceeds revenues generated by SMS and MMS services, as even middle-class mobile phones are beginning to offer a full range of Web, mail and multimedia applications as standard. Another boost for the market is provided by the continually falling prices of laptops and netbooks.

While sales of mobile data services excluding SMS and MMS rose to some €3.2 billion in 2009, Germany expects further growth of around 80% compared to 2009 figures over the next three years, making it highly likely that sales will exceed the €6 billion mark by 2013 (see fig. 1).

This makes Germany, along with the United Kingdom, one of Europe's leading ICT nations (see fig. 2).

In its 12th Report on Information and Communication Economy Surveys (see www.tns-infratest.com/bmwi), the TNS Group has identified a set of key opportunities for Germany to grow its position as a technology leader, by:

- Expanding advanced telecommunication infrastructures as a basis for innovation (such as implementing the Federal Government's broadband strategy)
- Leveraging the country's 'digital dividend' to drive wide-area broadband coverage while instigating alternative technologies (such as broadband via cable)
- Further extending the use of the Internet, especially to small and very small businesses
- Closing the digital divide that still holds between certain sex, age, education and income groups by providing barrier-free Internet access and more computer facilities at schools.
- Growing mobile Internet usage and upgrading mobile technology
- Developing new submarkets in mobile telecommunications, especially for mobile multimedia and non-voice services, by offering good value services (flat rates) and user-friendly terminal devices
- Adopting 'embedded systems' with a projected ten percent annual growth rate on the provider side
- The Internet of Energy including green IT and e-energy – making broad use and exporting 'green IT made in Germany'
- The Internet of Things – especially through RFID (Radio Frequency Identification, a close-range radio technology) which in 2010 is expected to account for around 8 percent of gross value added in the manufacturing, retail and transport industries as well as for public and private service providers. With annual growth of around 25 percent, RFID sales are expected to reach approximately €16 billion by 2016.

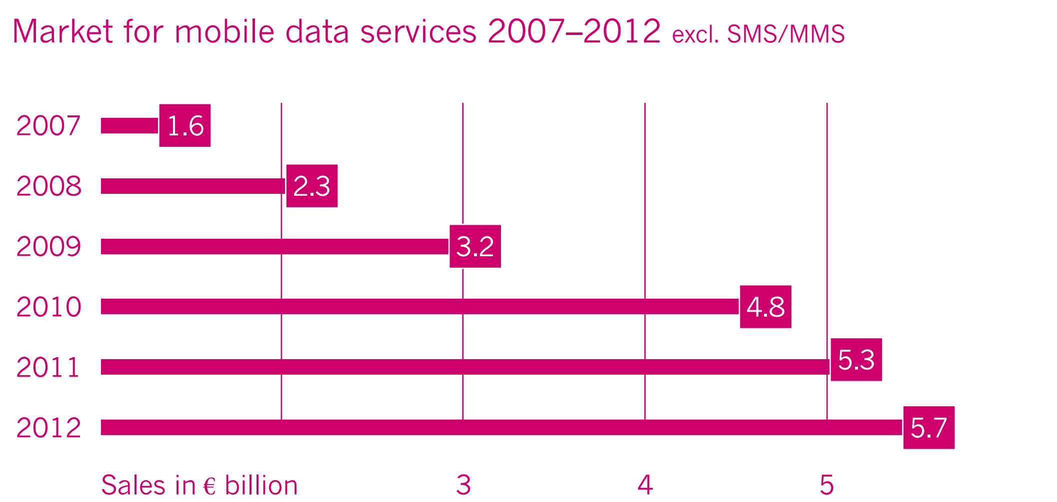

Fig. 1

Sources fig. 1: Goldmedia, BITKOM, FAZ 24 March 09; fig. 2: BITKOM

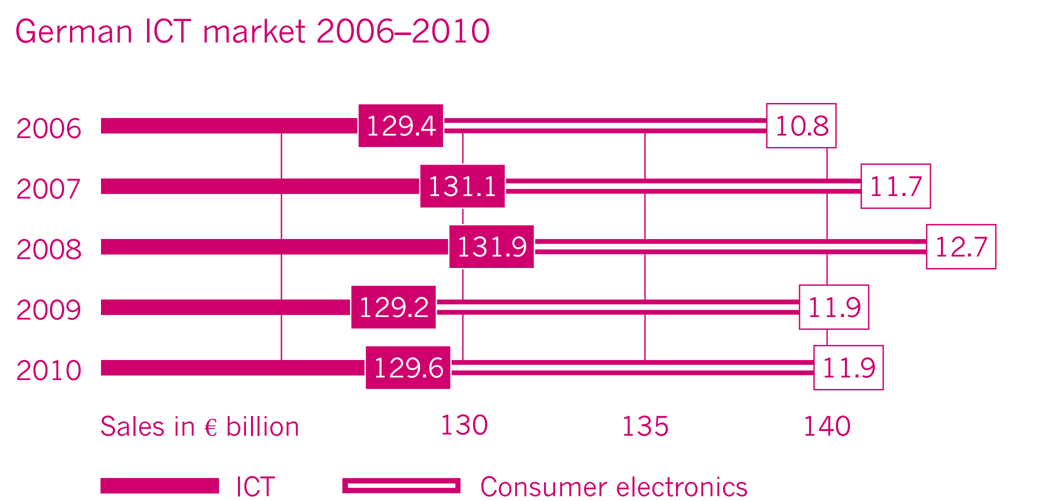

Fig. 2

- The Internet of Services – including innovative applications such as cloud computing, which is expected to account for as much as ten percent of global IT expenditure by 2012

Other opportunities identified by the experts include the creation of innovation clusters for ICT security solutions as well as e-Government applications. Sales in the ICT security segment are expected to rise from €4.8 billion in 2008 to €10.6 billion by 2015, while e-Government is still lacking innovative solutions for interdepartmental administration, community-friendly IT-based administration and collaborative solutions linking businesses and government.

The place to be for telecommunication providers

Sourcing the right hardware is critical for telecommunication providers. In Düsseldorf, major networking technology suppliers and hardware wholesalers offer door-to-door cooperation.

Ranging from global players to innovative start-ups, some 100,000 companies in the region create a dense network of suppliers, users and customers that is unique within Germany.

The place to be for telecommunication providers

Currently, Düsseldorf is home to more than 30 network and service providers. This includes network carriers and service providers operating over the public fixed line network or via mobile telecommunication networks. Using either proprietary glass-fibre infrastructure or purchased network capacities, they supply their customers with state-of-the-art broadband voice and data transfer services throughout Düsseldorf and beyond. In addition to Deutsche Telekom, major fixed network providers include Versatel, COLT Telecom, TELE2, BT Germany and – following the acquisition of Arcor – now also Vodafone.

E-Plus

E-Plus Mobilfunk, now the German branch of Dutch telecommunications provider KPN Mobile, started its digital operations in Düsseldorf in May 1994. Today, the 'E-Net' can boast over 18 million mobile phone subscribers. In July 2009, the company moved into its new headquarters, which has capacity for around 1,000 employees. The new building is a clear declaration of confidence in the location. The company spun off its network operations in 2007, which resulted in the launch of Alcatel-Lucent Network Services GmbH.

Every relevant player in the hardware and software industry has either major offices or its headquarters in Düsseldorf. Businesses work together to build the future of the telecommunications infrastructure.

Vodafone

The state capital has occupied a leading position in mobile telecommunications for over 15 years. Two of the country's largest private mobile service providers are headquartered here. It all started when leading telecommunications group Vodafone (formerly Mannesmann Mobilfunk) launched D2, its own mobile network, in June 1992. Today, over 40 million customers are using the D2 net. Major Vodafone business partners within the city include Research in Motion (RIM), which offers the BlackBerry range of products, and HP Enterprise Services, a subsidiary of Hewlett Packard GmbH which was renamed following the acquisition of EDS last year.

In 2009, the E-Plus Group also started its large-scale EDGE (Enhanced Data Rates for GSM Evolution) expansion programme, thus enhancing its network capabilities even further. Since the end of 2009, around 90 percent of Germans have been able to benefit from the EDGE data accelerator in the E-Plus network. Now it is possible to surf the mobile Internet at speeds in excess of ISDN, even in areas without UMTS coverage, using a convenient mobile end device – with data transmission rates of up to 240 kilobits per second. With its large-scale EDGE roll-out, E-Plus has made a major investment in its UMTS network, and expansion continues with the help of local business partners – another example of E-Plus' targeted investment strategy concerning the data network.

Network expansion

Following the integration of the third-generation broadband mobile standard UMTS (universal mobile telecommunications system) into the existing GSM mobile network, all mobile telecommunications providers committed themselves to further improving mobile broadband speeds, by making use of both high-speed downlink packet access (HSDPA) and EDGE. These mobile data transfer technologies are based on the existing UMTS/GSM networks, thus enabling mobile data transfer speeds comparable to the fixed broadband network.

According to BITKOM, by the end of 2007 there were already more than 10 million UMTS connections in Germany. This figure is set to break the 16 million mark in 2010.

Manufacturers such as Ericsson and Nokia are pushing mobile device development in the direction of mobile computers and multimedia devices and are benefiting from the consumer demand for ever new products and applications. A significant proportion of this highly profitable value added chain is being realised here in Düsseldorf.

This huge success is based on a number of factors, not least the many highly competent, innovative and service-oriented small and medium-sized IT enterprises (SMEs) in Düsseldorf, many of which serve as mission-critical service providers and suppliers to global corporations. The sheer density of specialists in the area provides ample opportunity for business partner-

Network operators with own mobile or fixed networks

BT (Germany) GmbH & Co. OHG	Kreuzerkamp 9	40878	Ratingen	www.bt.com/globalservices	BO
CALLAX Telecom Holding GmbH	Leopoldstraße 16	40211	Düsseldorf	www.callax.de	HQ
COLT Telecom GmbH	Uerdinger Straße 90	40474	Düsseldorf	www.colt.net	BO
Deutsche Telekom AG, T-Home	Heerdter Lohweg 35	40549	Düsseldorf	www.telekom.de	BO
E-Plus Mobilfunk GmbH & Co. KG	E-Plus-Straße 1	40468	Düsseldorf	www.eplus.de	HQ
KPN EuroRings B.V.	Vogelsanger Weg 91	40470	Düsseldorf	www.kpn.de	BO
Versatel Holding GmbH	Niederkasseler Lohweg 181–183	40547	Düsseldorf	www.versatel.de	HQ
Vodafone D2 GmbH	Am Seestern 1	40547	Düsseldorf	www.vodafone.de	HQ

HQ = headquarters, BO = branch office

Table 1

Telecommunication service providers without own network

010012 Telecom GmbH	Graf-Adolf-Platz 6	40213	Düsseldorf	www.010012.com	BO
01058 Telecom GmbH	Leopoldstraße 16	40211	Düsseldorf	www.01058.com	HQ
allMobility Deutschland GmbH	Eutelis-Platz 2	40878	Ratingen	www.allmobility.com	HQ
Communication Services TELE2 GmbH	In der Steele 39a	40599	Düsseldorf	www.tele2.de	HQ
ecotel communication ag	Prinzenallee 11	40549	Düsseldorf	www.ecotel.de	HQ
Lebara Germany Limited	Zollhof 4	40221	Düsseldorf	www.lebara-mobile.de	BO
EUROVOX TeleCom GmbH	Hansaallee 2	40545	Düsseldorf	www.eurovox-telecom.de	HQ
fidelity-tele.com gmbh	Worringer Straße 65	40211	Düsseldorf	www.fidelity-tele.com	HQ
freenet Datenkommunikations GmbH	Willstätterstraße 13	40549	Düsseldorf	www.freenet-business.de	BO
GTCom GmbH	Holzstraße 2	40221	Düsseldorf	www.globaltelcom.de	HQ
intelicom GmbH	Neuer Zollhof 3	40221	Düsseldorf	www.01045intelifon.de	HQ
Karttel GmbH	Schützenstraße 71	40211	Düsseldorf	www.karttel.de	HQ
Mox Telecom AG	Bahnstraße 43–45	40878	Ratingen	www.mox.de	HQ
net mobile AG	Zollhof 17	40221	Düsseldorf	www.net-m.de	HQ
operator AG	Werftstraße 47	40549	Düsseldorf	www.operator.de	HQ
Ortel Mobile GmbH	Gladbecker Straße 3	40472	Düsseldorf	www.ortelmobile.de	HQ
ring Mobilfunk GmbH	Leopoldstraße 16	40211	Düsseldorf	www.ring.de	HQ
simyo GmbH	Ernst-Gnoß-Straße 24	40219	Düsseldorf	www.simyo.de	HQ
toBEmobile GmbH	Prinzenallee 9–11	40549	Düsseldorf	www.tobemobile.de	HQ

Table 1a

HQ = headquarters, BO = branch office

VoIP service providers

Avaya GmbH & Co. KG	Fritz-Vomfelde-Straße 20	40547	Düsseldorf	www.avaya.de	BO
CSL Computer Service Langenbach GmbH	Hansaallee 191	40549	Düsseldorf	www.csl-computer.com	HQ
Damovo Deutschland GmbH & Co. KG	Benrather Schlossallee 33	40597	Düsseldorf	www.damovo.de	HQ
dus.net GmbH	In der Steele 29	40599	Düsseldorf	www.dus.net	HQ
Mitel Networks GmbH	Prinzenallee 15	40549	Düsseldorf	www.mitel.com	BO
sipgate GmbH	Gladbacher Straße 74	40219	Düsseldorf	www.sipgate.de	HQ

Table 1b

HQ = headquarters, BO = branch office

Networking technology providers and hardware retailers

Alcatel-Lucent Network Services GmbH	Parsevalstraße 9 a	40468	Düsseldorf	www.alcatel-lucent.de	HQ
Cisco Systems GmbH	Hansaallee 249	40549	Düsseldorf	www.cisco.com/de	BO
ElectronicPartner GmbH	Mündelheimer Weg 40	40472	Düsseldorf	www.comteam.de	HQ
ELTEL Networks Communications GmbH	Wanheimer Straße 47	40472	Düsseldorf	www.eltelnetworks.com	BO
Ericsson GmbH	Fritz-Vomfelde-Straße 26	40547	Düsseldorf	www.ericsson.de	HQ
FDK Electronics GmbH	Heerdter Lohweg 89	40549	Düsseldorf	www.fdk.co.jp	BO
Fujitsu Ten (Europe) GmbH	Heerdter Lohweg 89	40549	Düsseldorf	www.fujitsu.com	HQ
HP Enterprise Services, Hewlett-Packard GmbH	Am Seestern 4	40547	Düsseldorf	www.hp.com	BO
Huawei Technologies Deutschland GmbH	Am Seestern 24	40547	Düsseldorf	www.huawei.com/de	HQ
NEC Electronics (Europe) GmbH	Arcadiastraße 10	40472	Düsseldorf	www.eu.necel.com	BO
Nokia Siemens Networks GmbH & Co. KG	Völklinger Straße 1	40219	Düsseldorf	www.nokiasiemensnet-works.com	BO
NTT Europe Limited	Immermannstraße 40	40210	Düsseldorf	www.ntt.de	BO
Research In Motion Deutschland GmbH	Niederkasseler Lohweg 18	40547	Düsseldorf	www.blackberry.com	BO
Siemens IT Solutions and Services GmbH & Co. OHG	Völklinger Straße 1	40219	Düsseldorf	www.siemens.com/sis	BO
TATA Consultancy Services Limited	Heltorfer Straße 1	40472	Düsseldorf	www.tcs.com	BO
TDK Electronics Europe GmbH	Wanheimer Straße 57	40472	Düsseldorf	www.tdk.de	HQ
Tech Mahindra GmbH	Prinzenallee 7	40549	Düsseldorf	www.techmahindra.com	HQ
Toshiba Electronics Europe GmbH	Hansaallee 181	40549	Düsseldorf	www.toshiba-components.com	BO
ZTE Deutschland GmbH	Am Seestern 18	40547	Düsseldorf	www.zte-deutschland.de	HQ

Table 1c

HQ = headquarters, BO = branch office

Sources: Federal Network Agency, Commercial Registry Office, research by the Office of Economic Development
The list makes no claims to completeness. Errors excepted. Status: January 2010.

ships and collaborative development and distribution of new ITC products and services, in a highly diverse environment ranging from global players to specialised niche market operators.

Today Düsseldorf stands out as a prime location for the information and communication technology industry that offers a high degree of international diversification (see tables above). Every big-league player in the hardware and software sector has either major Düsseldorf branch offices or is headquartered here, collaborating with others to build the future of the telecommunication infrastructure and associated services.

Another important aspect of the Düsseldorf ICT cluster is the presence of industry interest groups – such as the BVDW, the Federal Association of the Digital Economy, which has a 1,000-strong membership and has been based in Düsseldorf for many years. The BVDW is currently planning to expand and move to larger premises. Focal points of its work include online marketing, e-commerce, social media, online gaming, and also mobile marketing and search engine marketing (www.bvdw.org).

The labour market and company start-ups

Almost ten percent of jobholders in Düsseldorf work in a communication-related sector – in ICT, the media or in advertising.

Young, technology-driven businesses in Düsseldorf are eligible for venture capital from the Sirius Seed Funds, a city initiative to promote start-ups in the ICT sector.

Labour market and company start-ups in Düsseldorf

The ICT industry is an important engine for creating and maintaining jobs. According to our own research, the number of jobholders in the sector currently stands at about 24,000 in around 1,500 companies, more than half of which work in information technology. Added to this, there are an important number of freelance employees, as the share of freelance work tends to be higher in the project-based IT business and in software enterprises than in other industry sectors. Together with the media sector (about 13,500 employees) and advertising (about 8,000 employees), more than 45,000 people – almost 10% of the city's total workforce – are employed in these communication-related sectors.

Start-up activities and the incipient economic recovery increase the demand for qualified personnel. Düsseldorf is located at the heart of the densest concentration of universities and research establishments in Germany and has the second highest workplace density in the country. Excellent availability of highly qualified staff is a major benefit when starting business in Düsseldorf.

As a rule of thumb, every successful business launch creates an average of five new jobs in three to five years. That's why supporting young entrepreneurs and potential founders counts among the core activities of the Office of Economic Development. The City of Düsseldorf offers special start-up consultancy and has its own start-up network in place. It supports business founders, young entrepreneurs and freelance professionals during their start-up phase and provides fledgling enterprises with expert services during their first few years. In addition to supporting freelancers, the programme promotes the establishment and settlement of new business.

Technology-driven enterprises, in particular, receive intensive support from the Düsseldorf Office of Economic Development. They are encouraged to participate in the NUK Business Plan Competition (NUK stands for 'networking and know-how') which helps young entrepreneurs to turn their business ideas into profitable business models and successfully establish themselves in the market. In 2009, a total of 414 entrepreneurs made up the 240 start-up teams. Around 35% came from the IT/multimedia and online/Web 2.0 segments.

Venture capital for young companies

In addition to providing end-to-end support, Düsseldorf also ensures that sufficient venture capital is available for business financing. The city's own Sirius Seed Fund offers young and innovative technology companies growth capital and expertise, helping them to successfully launch and build up their business models. The fund is predominantly aimed at start-ups, spin-offs from the city's universities and companies that have yet to launch their products on the market. Investment activities are focused primarily on information and communication technology and other technology fields such as life science, biotech/medical technology, new materials and engineering. The objective is to attract enterprises from these domains to the Düsseldorf economic area and to support them in achieving their goals here by providing capital and industry know-how.

> No other place in Germany boasts as many high-tech start-ups as Düsseldorf

The 2009 ICT Sector Survey

The Office of Economic Development conducts regular assessments of the city's ICT landscape: the sector has shown excellent stability for many years and is a true job engine.

More than half of the companies surveyed are involved in the production, retailing or sale of telecommunication devices.

Employment structure of companies active in information and communication technology

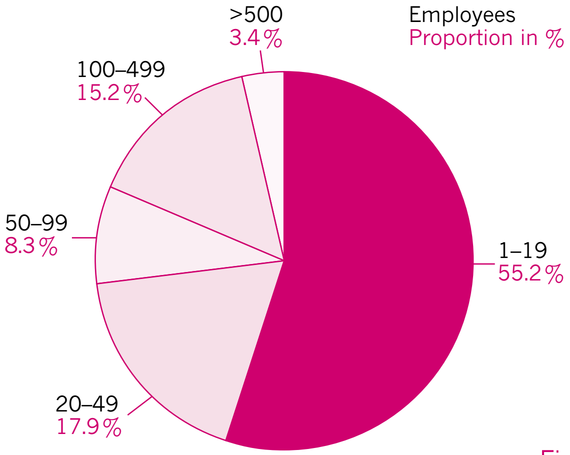

Fig. 3

The 2009 ICT Sector Survey

In 2009, the Düsseldorf Office of Economic Development conducted a survey of enterprises active in the information and communication technology sector.

More than 200 companies took part in the survey. Comparisons with earlier surveys show that the sector is developing positively, as is the number of jobs it provides.

Employment structure

An analysis of company size showed that the information and communication technology sector in Düsseldorf has a very large share of small to medium-sized enterprises. Over three quarters of companies employ a workforce of less than 50 (2007: 77%) and 55% have less than 20 employees (2004: 60%) – in contrast to the big multinationals with more than 500 employees that are headquartered in Düsseldorf. These large corporations, which are predominantly active in the national telecommunications markets, include Vodafone D2, Deutsche Telekom, E-Plus, Nokia Siemens Networks, Ericsson and IBM. With a share of about 24%, medium-sized enterprises with 50–499 employees form

Competent, innovative and service-oriented: small and medium-sized enterprises make up the bulk of the Düsseldorf ICT cluster

another important size group, ensuring a balanced ICT company landscape in Düsseldorf (fig. 3).

Start-up periods of companies from the information and communication sector

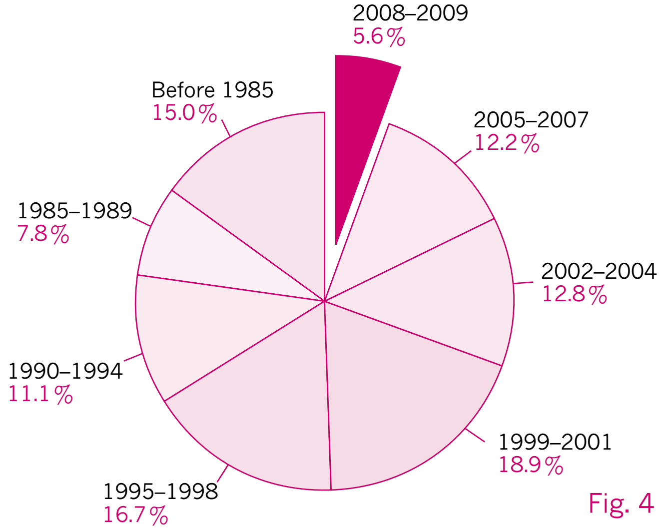

Fig. 4

Business focus of companies from the information and communication sector

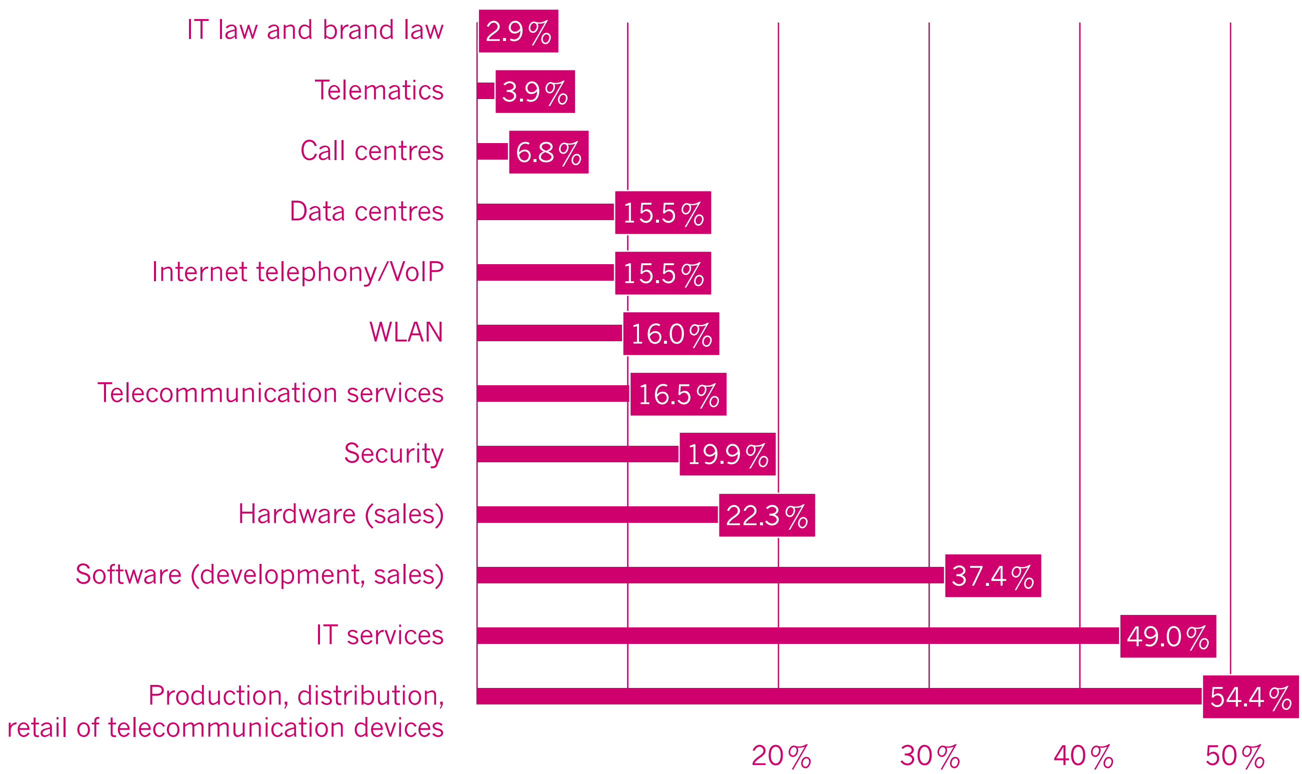

Fig. 5

Start-up period

The analysis of start-up periods reveals how young the majority of enterprises in the information and communication sector are, but it also shows how long-established enterprises have been able to maintain their market position over the years. One third of the companies surveyed are less than nine years old, while the share of companies that have come onto the market since the onset of the economic crisis is, of course, the lowest at 6%. Overall, however, the very large proportion of young companies demonstrates that market opportunities are still highly promising in Düsseldorf. And with the expected rise in IT budgets and the increasing readiness of companies to invest in new technology, business opportunities can be expected to thrive. At the other end of the spectrum, a fair amount of well-established ICT enterprises operate successfully, benefitting from excellent locational advantages and Düsseldorf's densely-knit ICT cluster. Just under 18% of the enterprises were launched between 1995 and 1998, 12% between 1990 and 1994 and around a quarter are well-established companies founded before 1989 (fig. 4).

Focus of business activity

More than half of the companies surveyed are active in the production, retail and sale of telecommunication devices (54%). Besides a great number of general business consultancies, Düsseldorf is also home to many IT specialists offering IT-related consultancy services (49%) ranging from assessing the current situation and defining service profiles and functional specifications during system design all the way to installation, implementation and subsequent support and maintenance (fig. 5).

In the software segment, more than a third of the companies surveyed are involved in development and sales (37%), serving the entire spectrum of software markets (fig. 6). Almost a quarter of the companies (22%) are active in the area of hardware sales (for a more detailed breakdown see fig. 7). They are closely followed by security providers (20%). Telecommunication services (17%), WLAN network technologies (16%), the high-growth market of internet telephony/VOIP (16%) and data centres (16%) make up the middle range, while IT law and brand law received the fewest mentions (4%; fig. 5).

Software development and sales (breakdown of fig. 5, business focus/software)

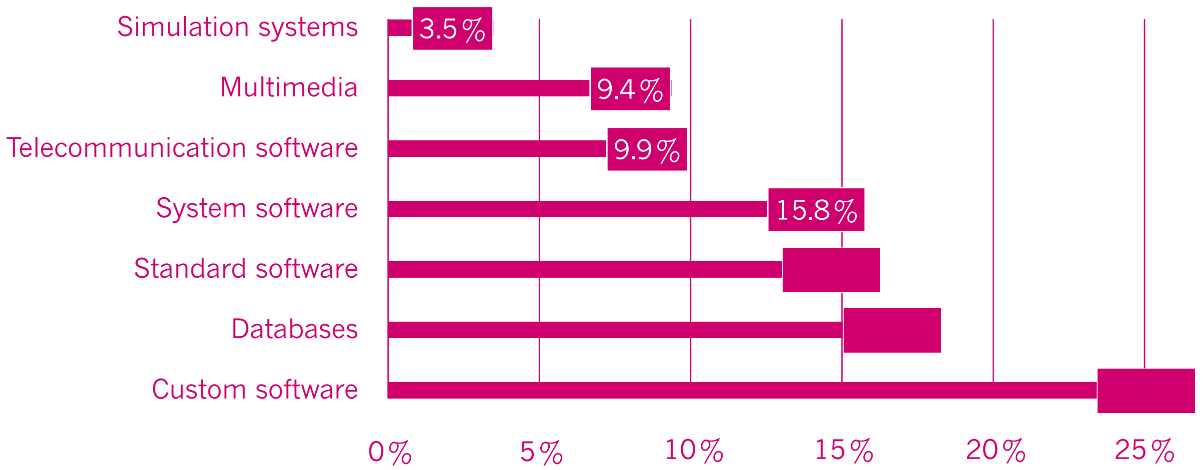

Fig. 6

In the software development segment, the focus is clearly on customer-specific software solutions (27%), but at 16%, standard software applications also have a fair share. These are followed by system software development (16%), telecommunication software (10%) and multimedia systems (9%). Simulation systems account for just 4% (fig. 6).

Figure 7 shows hardware sales activities, demonstrating that the main focus in Düsseldorf is on ICT equipment. Almost one third of the companies either sell networking components, wireless local area network systems (WLAN, Wi-Fi) or telecommunication devices. Wired network components and PCs are close behind at 28%, followed by storage media (13%), workstations/servers and peripherals (around 12% each).

Customer orientation

Only 15% of the surveyed companies declared that their services do not cater to a specific customer segment. As information and communication technology is a cross-industry technology and important innovation driver, most companies are focused on customers from industry (40%), retail (37%) and services (30%) as well as banks (29%) and insurance companies (25%). As regards the other industry sectors, the customer orientation of Düsseldorf-based companies shows a relatively balanced profile (see table 2 below).

Location and geographical diversification

More than 140 of the surveyed companies named Düsseldorf as their home base. These include major players such as Vodafone, EDS Application Services GmbH, E-Plus, Alcatel-Lucent Network Services GmbH, EPSON and QVC.

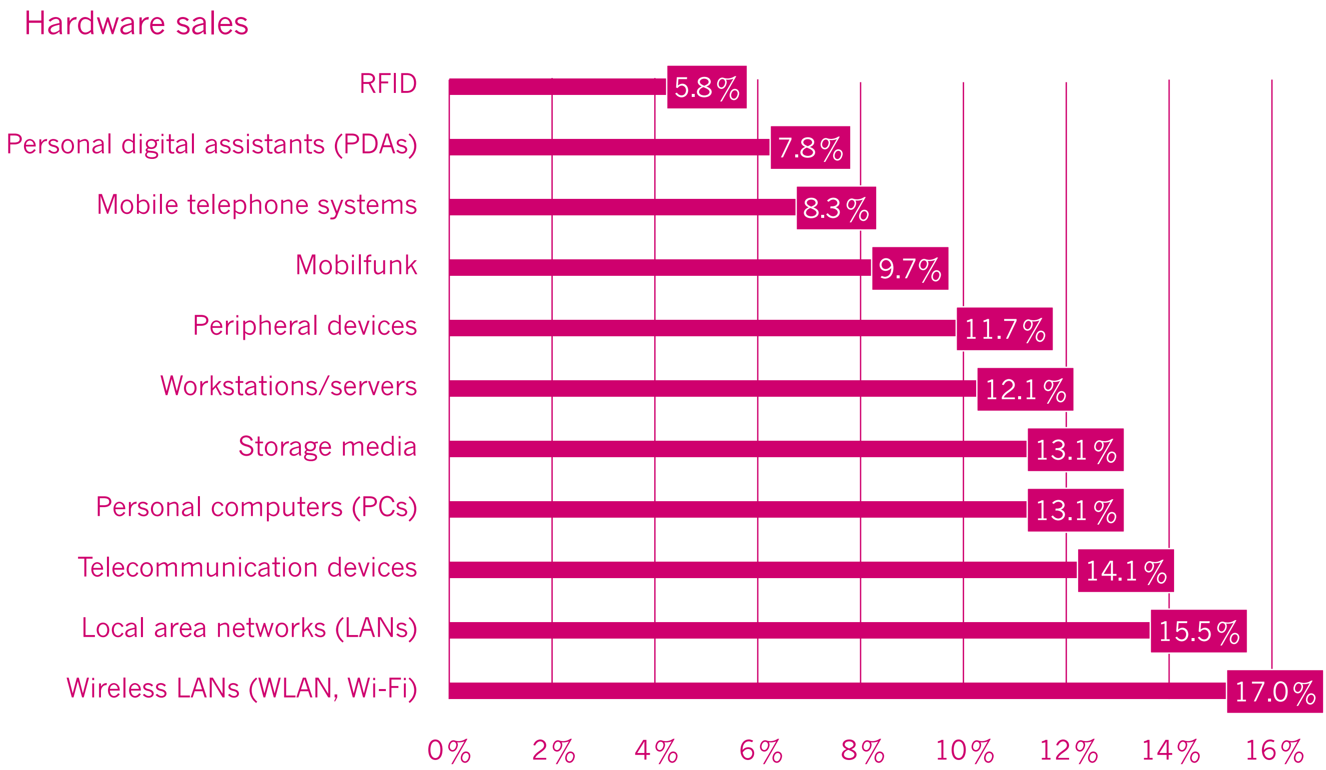

Fig. 7

Customer orientation of companies from the information and communication technology sector

Industry orientation	Absolute	In %
None	30	14.60 %
Industry	82	39.80 %
Retail	76	36.90 %
Service companies	60	29.10 %
Banks	59	28.60 %
Insurance companies	51	24.80 %
Public administration	50	24.30 %
Health care	39	18.90 %
Publishing industry	35	17.00 %
Public utilities	33	16.00 %
Associations/societies	29	14.10 %
Trades	28	13.60 %
Universities	26	12.60 %
Transportation	23	11.20 %
Others	29	14.10 %

Note: multiple responses were permissible
Source: own survey
Respondents: 206

Table 2

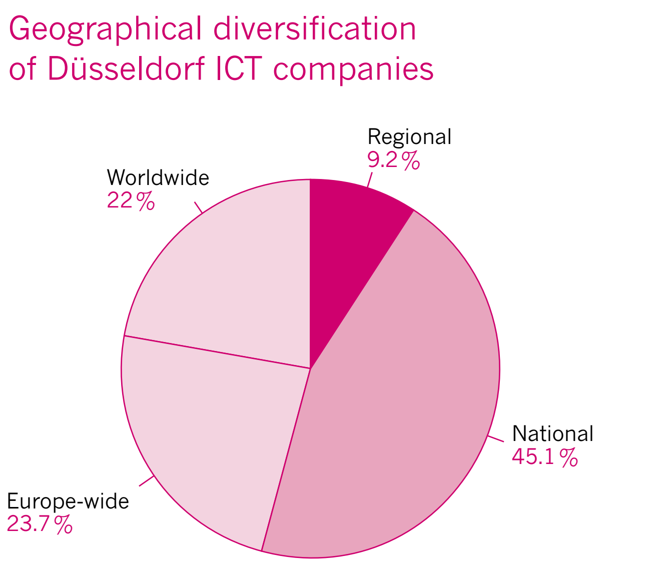

Fig. 8

A large number of other companies maintain branch offices in Düsseldorf. These include Research in Motion, COLT Telecom, Cisco, Mitsubishi Electric and NTT Communications.

Figure 8 shows the geographical orientation of the companies surveyed. 45% of them sell their products and services nationally. 9%, however, are only regionally active. This can be explained by the high population and company density in the region. 24% consider Europe to be their prime marketplace while 22% of them sell their products globally.

Düsseldorf's prime location in the Rhine-Ruhr area, one of the most densely populated regions in Western Europe, coupled with its modern transport infrastructure, provide renowned enterprises with the ideal environment to supply their marketplaces in the region as well as throughout Germany and the rest of Europe.

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