

City of
Düsseldorf

Location Profile Düsseldorf



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Düsseldorf - Worldwide Top for Business and Living

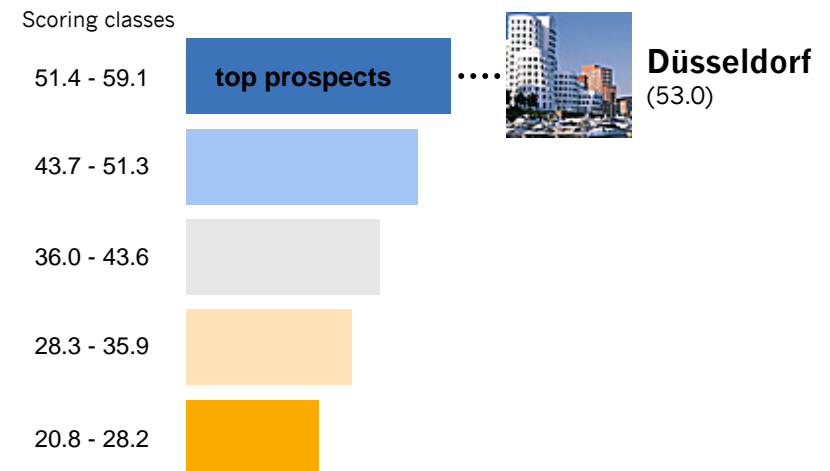
World's Top Cities in "Quality of Life"



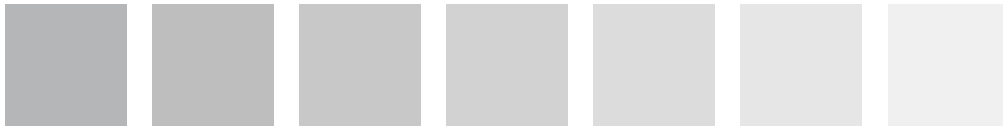
Source: Mercer Quality of Living 2010.

Düsseldorf - Top Future Prospects

Wealth prospects of German cities 2006 - 2015



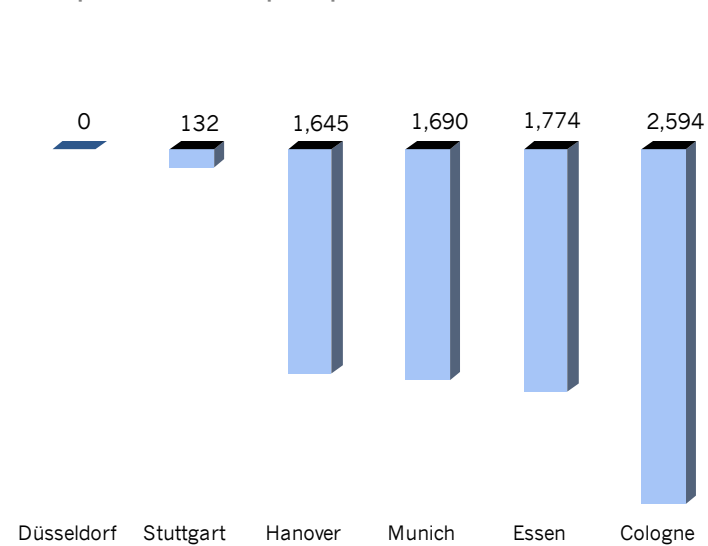
Source: FERI Research Institute 2009, own figuring.



City Budget of Düsseldorf - Balanced Sheet since 1999 !

Debt-free Düsseldorf ...

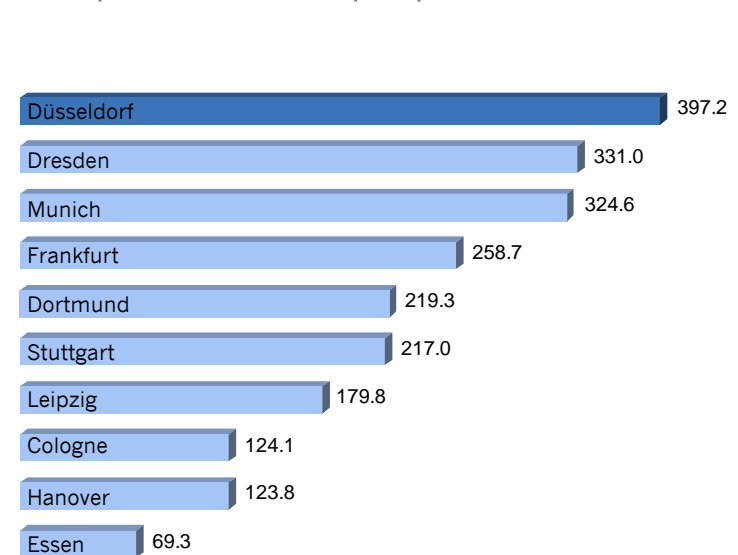
Municipal debts in euros per capita



Source: Finance Departments of the Cities 2009. Düsseldorf is debt-free since 9/12/2007.

... Means Scope for Sustainable Municipal Investments

Municipal investments in euros per capita




Sources: Finance Departments of the Cities or Statistical Offices of the Federal States. Datas as per 2008.

Düsseldorf - Heart of the European Market

Catchment Area of Düsseldorf



 500 km / 310 miles radius with 155 million inhabitants

Strong Market, Easy Access

- 155 million people live within a day's distance by lorry (500 km/310 miles)
- 31 % of the EU's total population (i.e. 50 % of EU purchasing power) live less than 500 km/310 miles away from Düsseldorf
- European economic capitals within a radius of a "one-hour flight": Amsterdam, Brussels, London, Luxembourg, Paris, Zurich
- Düsseldorf is the heart of the Rhine-Ruhr Area with 11.5 million people and 500,000 companies (within 1 hour's drive by car)

Worldwide Connected - Düsseldorf International Airport

Air Traffic in Figures

- Third biggest international airport in Germany
- 180 destinations worldwide
- 17.8 million passengers p.a.
- 214,024 flights p.a.
- 65,286 tons of airfreight p.a.
- Fast connection to the city (13 min. by local train)

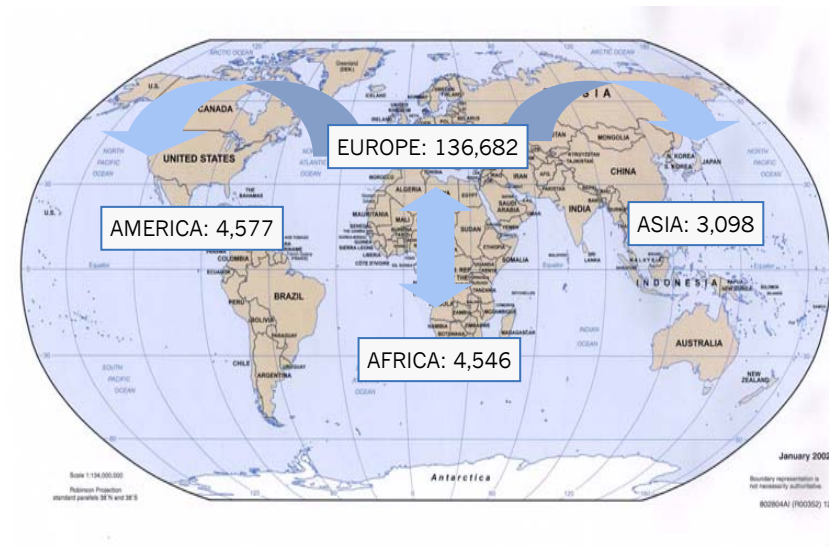
Non-Stop Flights (Examples)



- Atlanta
- Bangkok
- Chicago
- Detroit
- Dubai
- Los Angeles
- Moscow
- New York
- St. Petersburg
- Teherane
- Toronto
- Vancouver

Düsseldorf - Worldwide Connected

International movements with Düsseldorf Airport



Source: Flughafen Düsseldorf GmbH. Figures as of 2009.



Düsseldorf - Easy Access by Powerful Traffic Systems

Railroads



- More than 900 train departures per day
- 150 express train departures
- More than 300 stops at the airport station

Highways



- 13 highway junctions
- 50 highway kilometers
- 13 park & ride areas

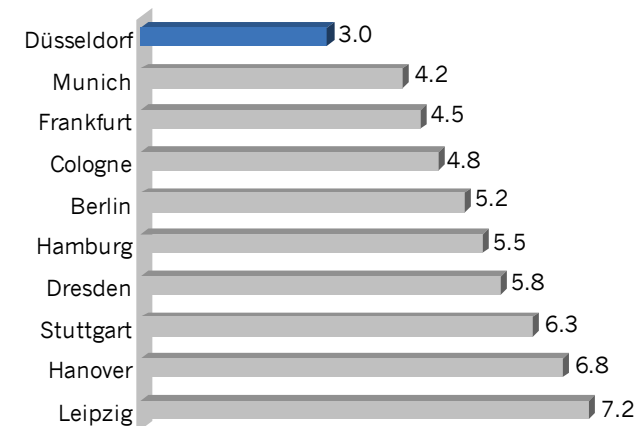
Riverport



- On the River Rhine
- Size: approx. 5 km² / 2 sqmiles
- 16.4 million tons of handling of cargo
- 28 crane systems
- 17 trains

Best Grade for Düsseldorf Traffic System

Grades from 1 to 10 by evaluation of traffic indicators



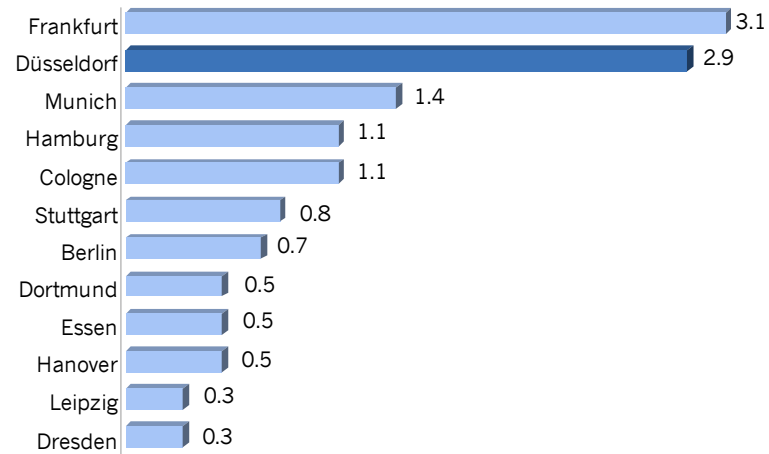
Source: Bellevue-Survey 2009. Category „Traffic“ in annual city ranking. Grading between 1 (=top) and 10.



Düsseldorf - Center of Attraction for Foreign Investments

Strong Presence of Foreign Partners in Düsseldorf

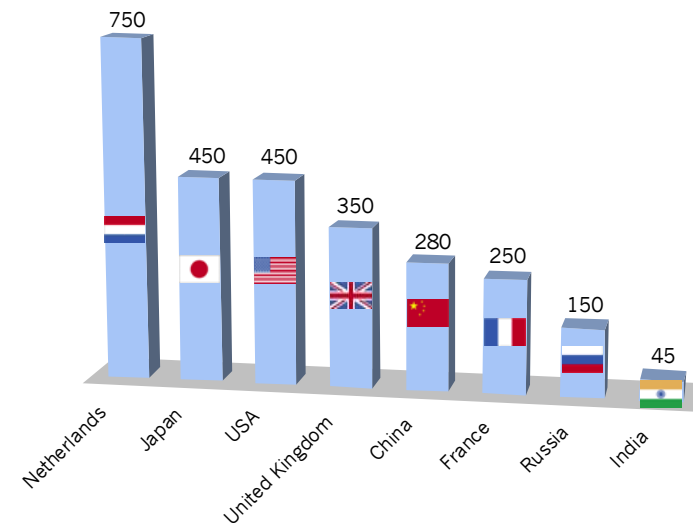
Foreign partners per 1,000 inhabitants in German cities



Source: Database of Firmenwissen, 2009. Included are only nations with strong import-export business relations to Germany.

Foreign Companies in the Rhine-Ruhr-Area

Approximately 5,000 foreign companies, among them:



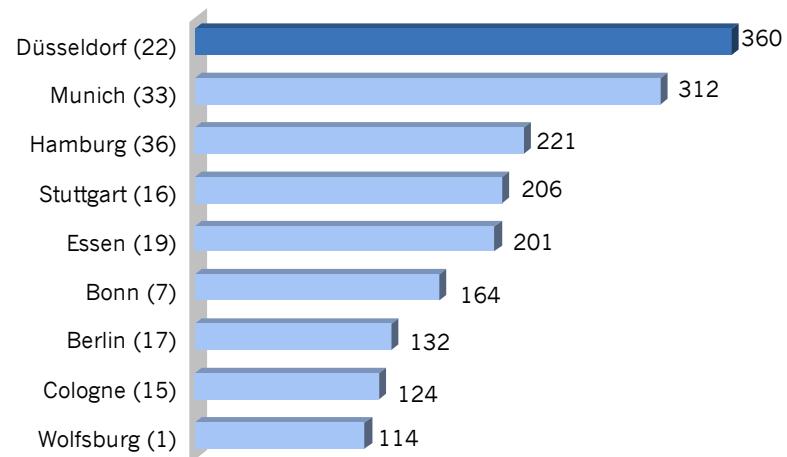
Sources: Local Trade Registry, Düsseldorf Chamber of Commerce, Foreign Trade Chambers, NRW Invest.



Global Player City Düsseldorf

On Top of the Global Players in Germany

Turnover of the national and international Top 500 companies in Germany in billions of euros



Figures in brackets show the number of companies among the Top 500.

Source: Die Welt 2009.

Foreign Headquarters in Düsseldorf (Examples)

- BBDO
- Deloitte & Touche
- Ericsson
- Fujifilm Europe
- Grey
- Huawei
- LVMH Parfums
- McKinsey
- Mitsui
- Nokia Siemens
- Novell
- QVC
- Renesas
- TATA
- The Bank of Tokyo-Mitsubishi
- Toshiba
- Vodafone Group
- ZTE

German Headquarters in Düsseldorf (Examples)

- E.on, Energy
- Metro, Trading
- ThyssenKrupp, Steel
- Henkel, Home Care, Cosmetics, Adhesives
- Vodafone D2, Telecommunications
- C & A, Apparel
- Rheinmetall, Metal Products
- E-Plus, Telecommunications



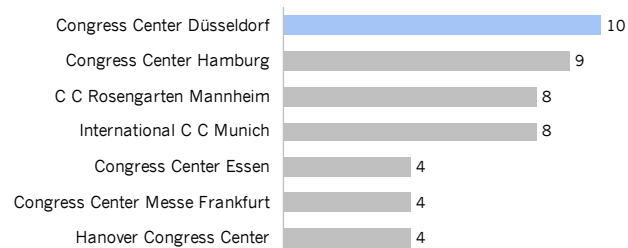
Düsseldorf Trade Fair and Congress Center - Internationally Renowned and Favored

Düsseldorf Trade Fair in Figures

- Nearly 50 international specialized fairs
- 23 of them are No. 1 in their sector worldwide
- Capacity incl. 19 exhibition halls:
307,000 sqm / 3.3 million sqfeet
- Top years group sales : 496 million euros
- Up to 32,500 exhibitors per year
- Up to 2.7 million visitors per year
- Share of exhibitors from abroad: 56 %

Favored Congress Center

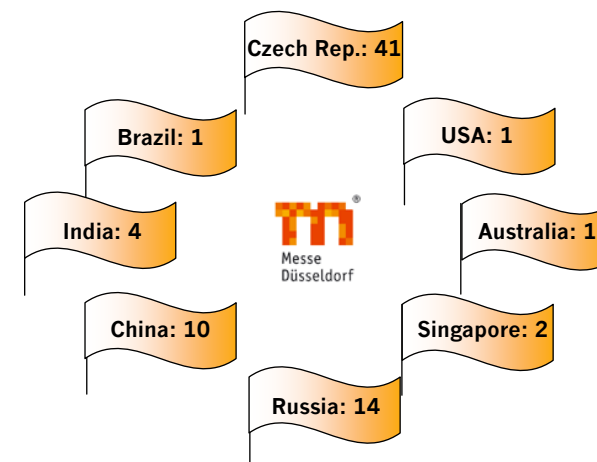
Number of annual general meetings



Source: HV Magazine 2009. Meetings in the category Congress Centers.

Düsseldorf Trade Fair worldwide

Trade fairs abroad run by Messe Düsseldorf (Examples 2010)



Source: Messe Düsseldorf.



International Institutions in Düsseldorf

Consulates and Consular Offices

- 40 consulates and consular offices

among them:

- USA
- Japan
- France
- United Kingdom
- Netherlands
- Czech Republic

Chambers of Commerce

- 33 foreign chambers of commerce and trade promotion organizations

among them:

- United Kingdom
- France
- Japan
- China
- India
- Russia

International Clubs

- Rotary Club
- Industry Club of Düsseldorf
- Japanese Club of Düsseldorf
- Lions Club
- Marketing Club
- Business Club Düsseldorf
- Düsseldorf China Club
- German & Czech Businessclub



International Schools and Foreign Inhabitants

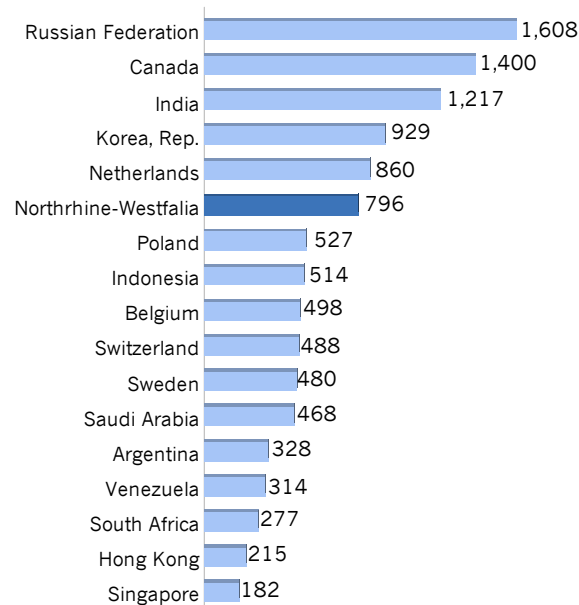
- International School of Düsseldorf with 1,000 pupils from 50 nations
- Japanese International School of Düsseldorf
- Lycée Français de Düsseldorf
- Russian Educational Center
- Complete Greek Education System
- 4 German highschools are running a bilingual stream
- Several international kindergartens
- 110,000 foreign inhabitants (i.e. 18 %), thereof: Europe 74.4 %, Asia 14.3 %, America 2.8 %



Düsseldorf is State Capital of Northrhine-Westfalia - The Successful Competitor on a Global Scale

Northrhine-Westfalia, No. 17 in GDP Worldwide

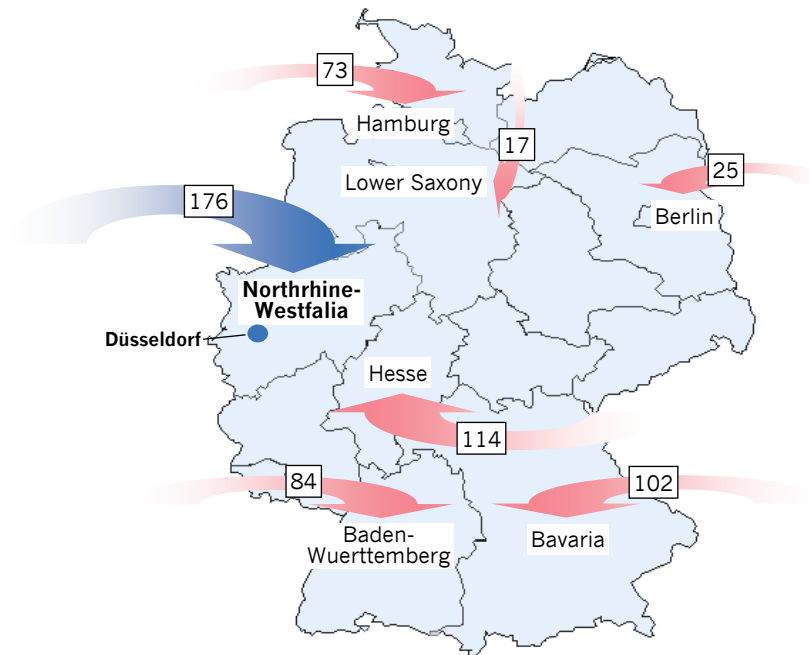
Gross Domestic Product in billions of USD 2008 for selected countries



Sources: World Bank, Statistical Office of Northrhine-Westfalia and Deutsche Bundesbank for average exchange rate 2008.

Attractive Location for Foreign Investments

Foreign investments in German Bundesländer in billions of euros

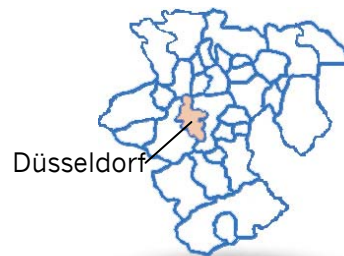


Source: NRW Invest with reference to Deutsche Bundesbank 2009. Datas as of 2007.



Rhine-Ruhr Area - Playing in a League with New York, London or Paris

Rhine-Ruhr Area



Source: IKM, BBSR.

■ km²/sqmi: 10,819/4,177
■ Population: 11.5 m
----- 60 km/37 mi

Metro-Region New York



Source: U.S. Census Bureau.
Area: Adjusted layout of Metro-Division.

■ km²/sqmi: 6,120/2,363
■ Population: 14.0 m
----- 70 km/43 mi

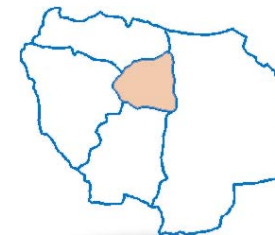
Greater London Region



Source: Greater London Authority.
Area: Greater London plus adjacent counties.

■ km²/sqmi: 14,188/5,478
■ Population: 13.6 m
----- 90 km/56 mi

Paris - Ile de France



Source: INSEE, France.

■ km²/sqmi: 12,000/4,633
■ Population: 11.7 m
----- 70 km/43 mi



Rhine-Ruhr Area - Biggest Market in Germany



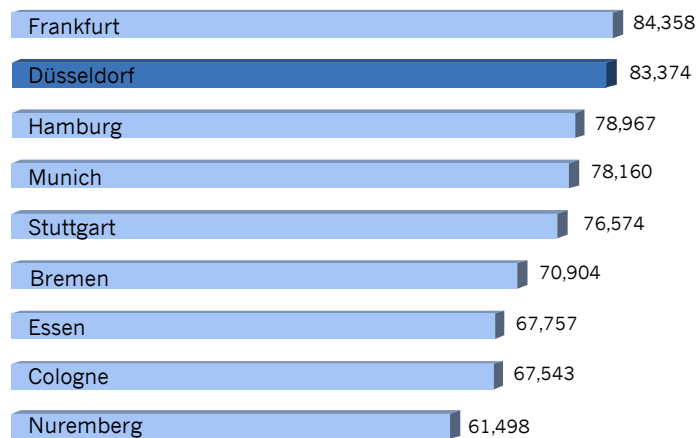
Sources: IKM, BBSR.



Düsseldorf - Outstanding Economic Location

Top Productivity in Düsseldorf

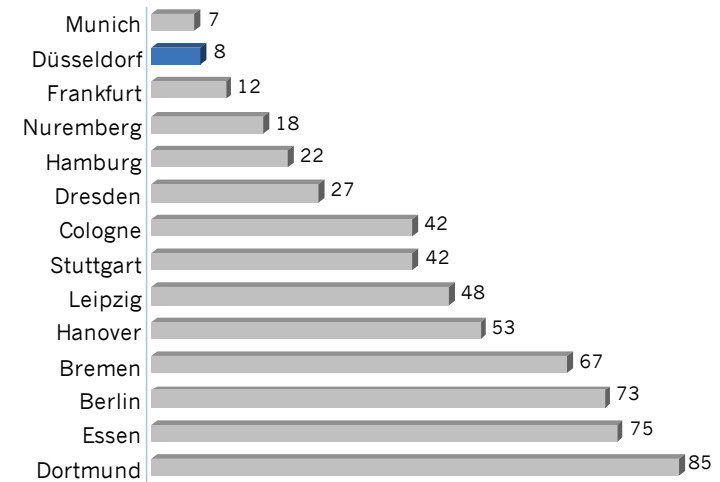
Gross Domestic Product per employee in euros



Source: Research Group of National Accounting 2009. Datas as per 2007.

Perfect Economic Structure

City ranking in the category „structure“



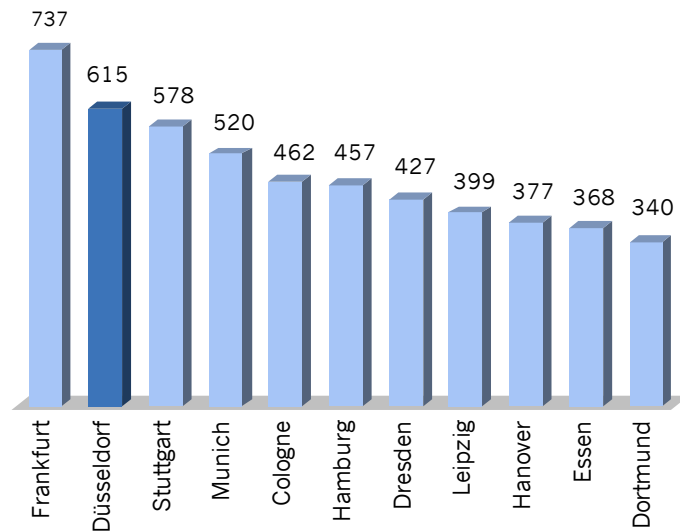
Source: INSM, IW Consult 2009. The „Structure“ ranking shown adds the subranking „Niveau“ and the subranking „Dynamik“. The figure shows the selection of German cities with 500,000 inhabitants and more.



Düsseldorf - The Career City for Employees

High Concentration of Employment

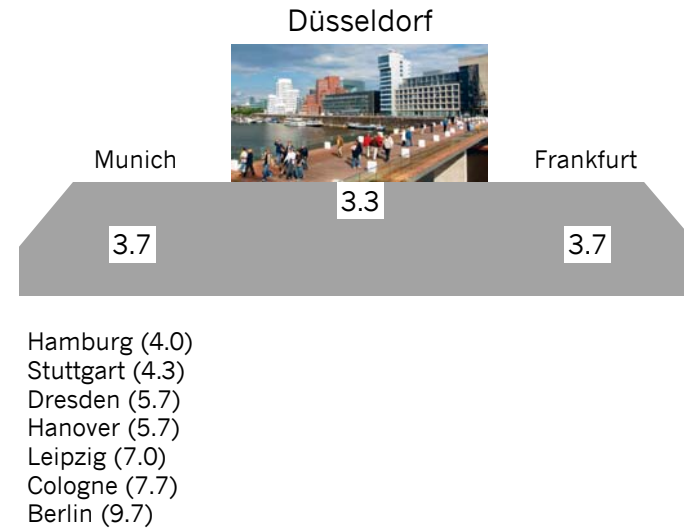
Number of employees per 1,000 inhabitants



Sources: Federal Labor Agency, Federal Statistical Office. Datas as per 2009.

Most Favored Workplace

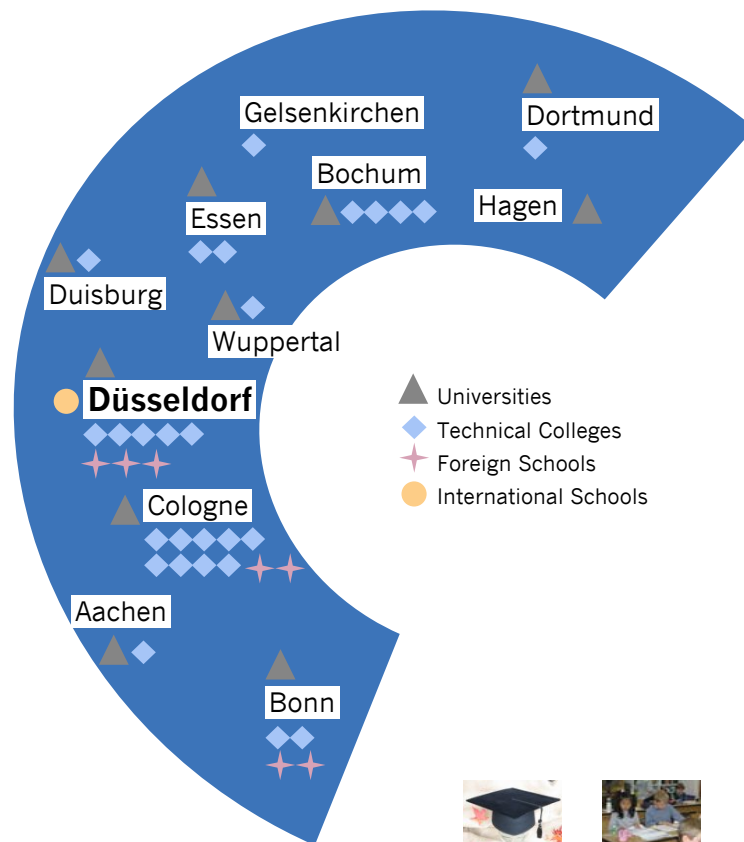
Grading of German cities as working locations



Source: Bellevue-Survey 2009, Category „workplace“ in annual city ranking. Grading between 1 (=top) and 10.



Düsseldorf - Top Educational System



Rhine - Ruhr Area

- 42 universities, technical colleges, and administration academies
- 455,000 students within an 80 km / 50 miles radius

City of Düsseldorf

- Heinrich-Heine University
- Technical College Düsseldorf
- Düsseldorf Academy of Arts
- Robert-Schumann-University for Music
- Academy of Administration and Economy
- Academy of Public Health
- Clara-Schumann-Music-School
- Düsseldorf Institute for Competition Economics (DICE)
- Research college BioStruct



Düsseldorf Area - Powerful Accumulation of Research Institutes

ICT Sector

- Fraunhofer Institute for Microelectronic Circuits and Systems
- Fraunhofer Institute for Software and Systems Engineering
- Fraunhofer Institute for Laser Technology
- Institute for Mobile and Satellite Radio Technology
- Heinrich-Heine-University (Data Center, Center for IT & Media, Institute of Information)
- Technical College (Institute for Media, Communication & IT)

Life Sciences

- Max Planck Institute for Molecular Physiology
- Max Planck Institute for Neurological Research
- Max Planck Institute for Plant Breeding Research
- Max Planck Institute for Bio-inorganic Chemistry
- German Diabetes Center DDZ
- Research Center Jülich
- Biological-Medical Research Center BMFZ
- Institute for Environmental-Medical Research IUF

Engineering and Natural Sciences

- Max Planck Institute for Iron Research
- Centre for Innovative Energy Systems (ZIES)
- Fraunhofer Institute for Environmental Safety and Energy Technology
- Max Planck Institute for Radio Astronomy
- Max Planck Institute for Mathematics
- VDI Association of German engineers
- VDZ German Cement Works Association

● Düsseldorf

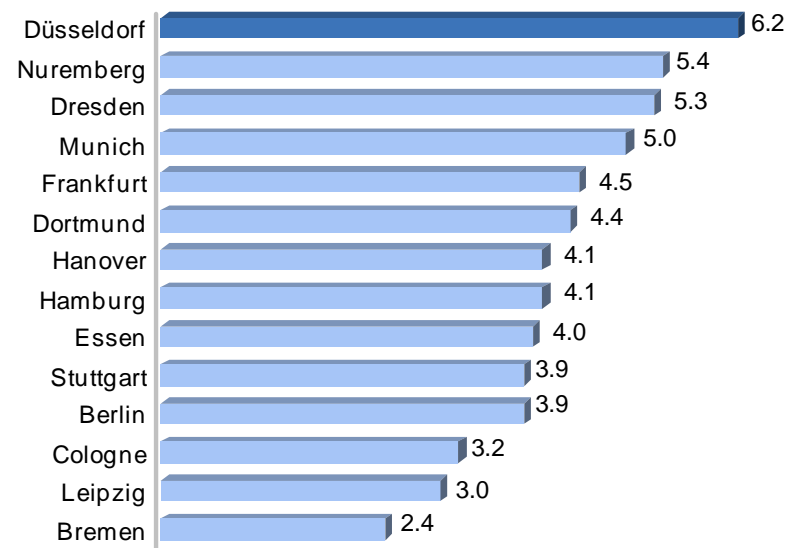




Düsseldorf Area - Outstanding Spot of High-Tech Companies

No. 1 in High-Tech Start-Ups in Germany

High-Tech start-ups per 100,000 employable persons

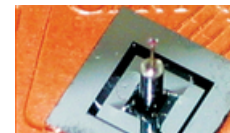


Source: ZEW. High-Tech Start-Ups per 100,000 employable persons 2005-2008. The figure shows the German cities with more than 500,000 inhabitants.

Successful Patent Area Düsseldorf

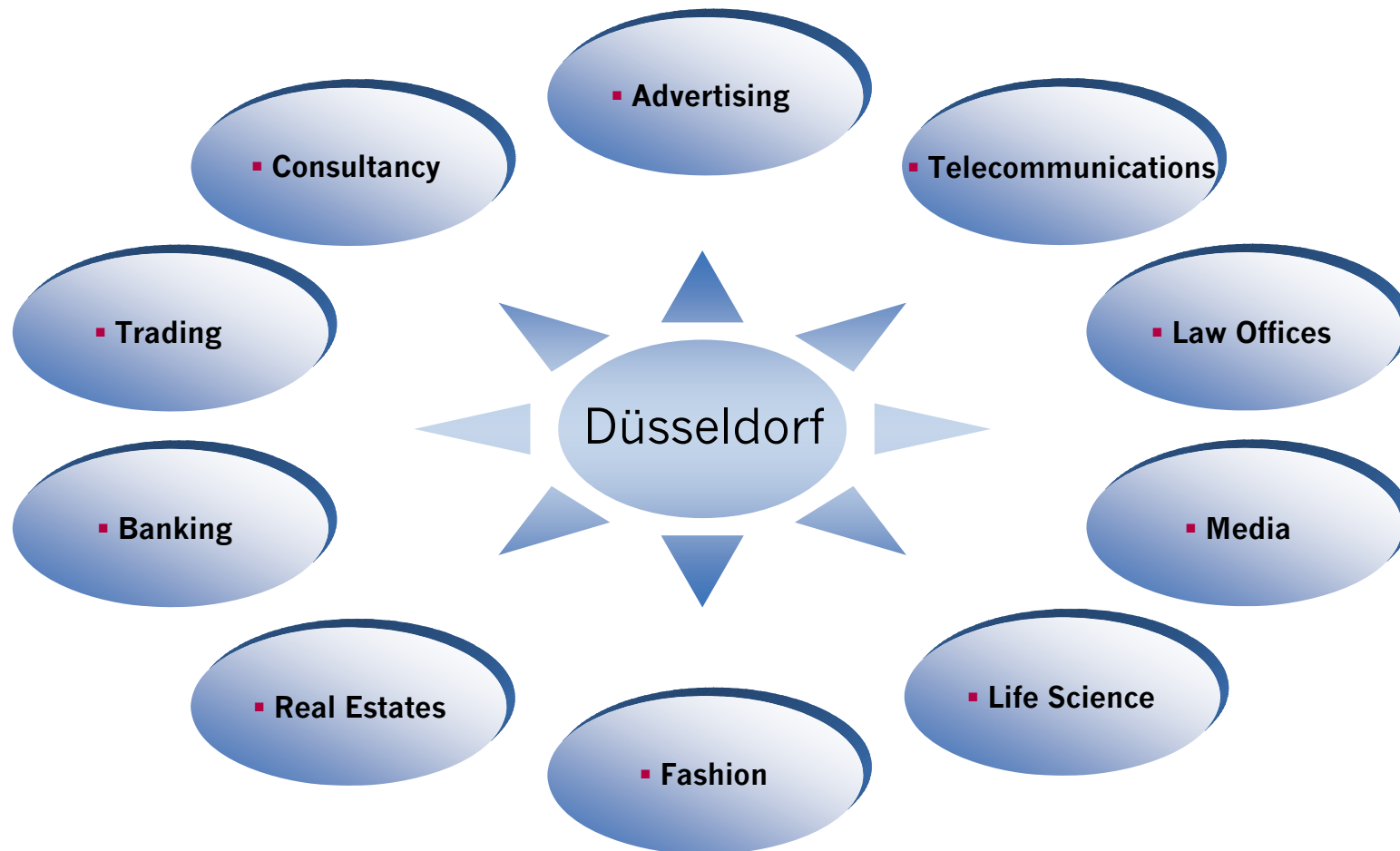
- No. 1 in the fields of:
 - Organic Chemistry
 - Dyes, Petroleum, Oils, Fats
- No. 2 in the fields of:
 - Building
 - Conveying, Hoisting, Saddlery
 - Grinding, Presses, Tools
 - Separating, Mixing
 - Preparations for medical, dental or toilet purposes
 - Textiles or flexible materials

Source: German Patent and Trade Mark Office.





Düsseldorf - Big Variety of Strong Industries





Real Estate Location Düsseldorf - Modern and Innovative

Düsseldorf Office Market

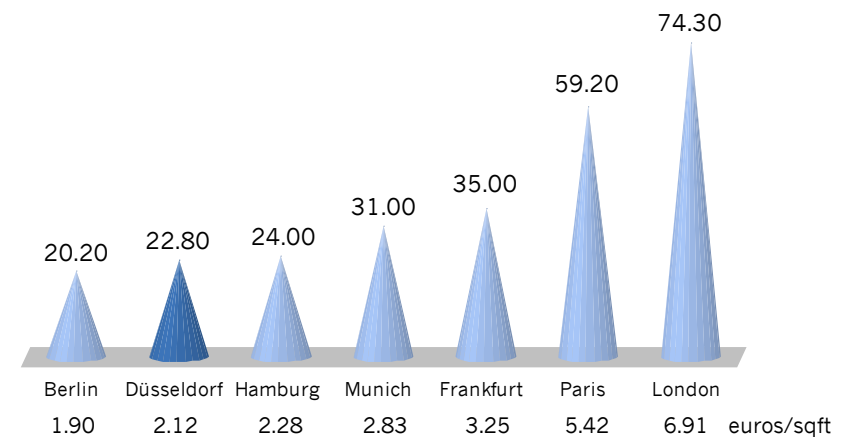
- One of the biggest locations for office space in Germany (8.64 million sqmeter / 92.9 million sqfeet)
- Stable office market, highly attractive for investments
- Fast availability of office space
- Germany's top architects. Examples: HPP, Ingenhoven architects, JSK, Kai 18, Petzinka & Pink, RKW
- Still reserve areas for office space to be build
- Architectural Association North Rhine-Westphalia

Famous Architects - Famous Buildings (Examples)

William Alsop	Colorium
Bothe Richter Teherani	Drei Hoch 5
Joe Coenen	DOCK
Sir Norman Foster	ARAG Hochhaus
Frank O. Gehry	Der Neue Zollhof
Helmut Jahn	Sign
Daniel Libeskind	Kö-Bogen (u.c.)
Fumihiko Maki	Maki-Solitär
Richard Meier	Feldmühlenplatz
Renzo Piano	Casa Stupenda (b.p.)
Claude Vasconi	Grand Bateau

Moderate Rents for Office Space

Prime rents of office space in euros per sqm



Source: BNP Paribas Q4 2009. Düsseldorf: gif.



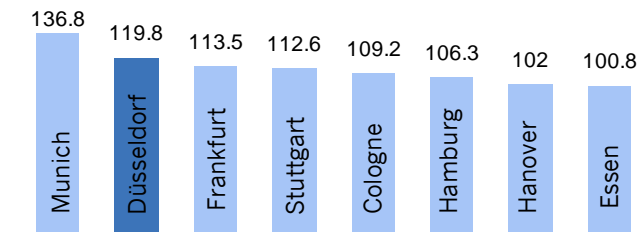
Düsseldorf - A Leading German Trade City

Trading in Düsseldorf

- 4,078 retail trade shops (sale of motor vehicles incl.)
- 2,142 wholesale trade companies
- 77,600 trade employees
- 810,500 sqm / 8.7 million sqft business premises
- Famous trade fair Euroshop
- KÖ (Königsallee) – most frequented luxury mile in Germany

Purchasing Power in German Cities

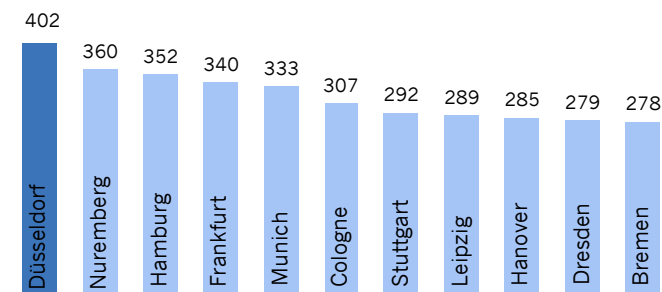
Purchasing power index, Germany = 100



Source: GfK, Nuremberg 2009.

Powerful Employment of Retail Trading

Retail trading employees per 10,000 inhabitants



Sources: Statistical Office of Germany, Federal Labour Agency, 2009.

Global Trading Companies in Düsseldorf

- Metro - Wholesale and Retail trading
- Salzgitter Mannesmann Trading - Steel
- C & A - Apparel
- Peek & Cloppenburg - Apparel
- Mitsui - Universal Trading
- Mitsubishi - Universal Trading
- NEC - Electronic Sales
- Oracle - Software Sales

METRO GROUP

SALZGITTER
MANNESMANN
HANDEL
Mit Unterstützung der Salzgitter Gruppe

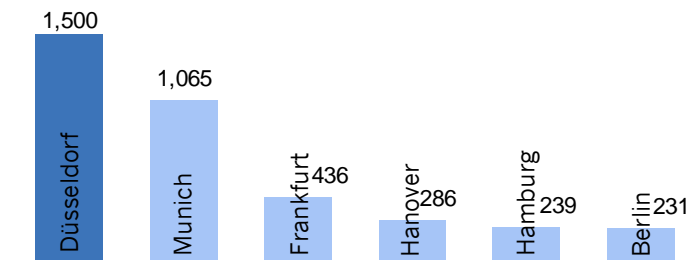
Peek & Cloppenburg
DÜSSELDORF

C&A
cand-a.com

Düsseldorf - High Concentration of Consultants, Accountants and Lawyers

Top Consultants Spot Düsseldorf

Revenues among the Top 25 consultants in German cities
in millions of euros



Source: Lünendonk 2009.

Consultants and PR in Düsseldorf (Examples)

- A.T. Kearney
- Accenture
- Arthur D. Little
- Bain & Company
- Booz & Company
- The Boston Consulting Group
- Deloitte Consulting
- Droege International Group
- Ketchum Pleon
- Kienbaum Management Consultants
- Kurt Salmon Associates
- Management Engineers
- McKinsey & Company
- Oliver Wyman
- Roland Berger

Accountants in Düsseldorf (Examples)

- BDO Deutsche Warentreuhand
- Cap Gemini
- Deloitte & Touche
- Ebner Stolz Münning Bachem Partnerschaft
- Ecovis
- Ernst & Young
- HLB Treuhand
- KPMG
- PwC
- Rölfs WP Partner
- Verhülsdonk & Partner
- Warth & Klein
- Wibera

Lawyers in Düsseldorf (Examples)

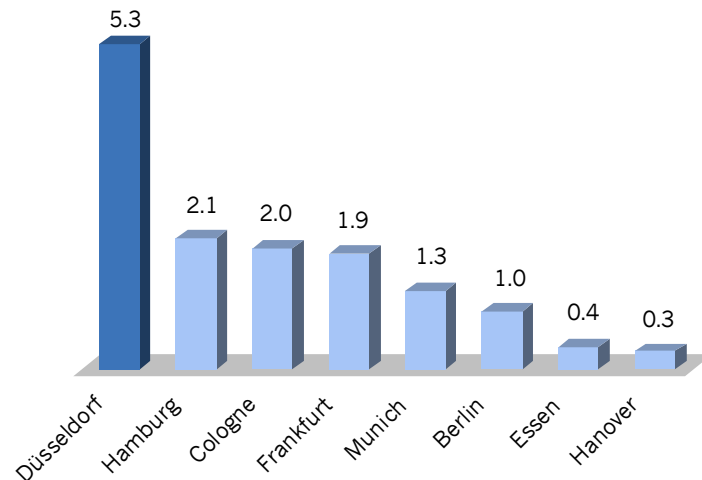
- Allen & Overy
- Baker & McKenzie
- Bird & Bird
- Clifford Chance
- CMS Hasche Sigle
- Freshfields Bruckhaus Deringer
- Gleiss Lutz
- Hengeler Müller
- Heuking Kühn Lüer Wojtek
- Kapellmann und Partner
- Linklaters
- Lovells
- Mc Dermott, Will & Emery
- Nörr Stiefenhofer Lutz
- Raupach & Wollert-Elmendorff
- Shearman & Sterling
- Taylor Wessing
- White & Case



Düsseldorf - Germany's No. 1 in Advertising

Advertising Capital Düsseldorf

Turnover in advertising in billions of euros



Source: Tax statistics of turnover 2010. Datas as of 2008.
Dates Munich as of 2007.

Strong Advertising Industry in Düsseldorf

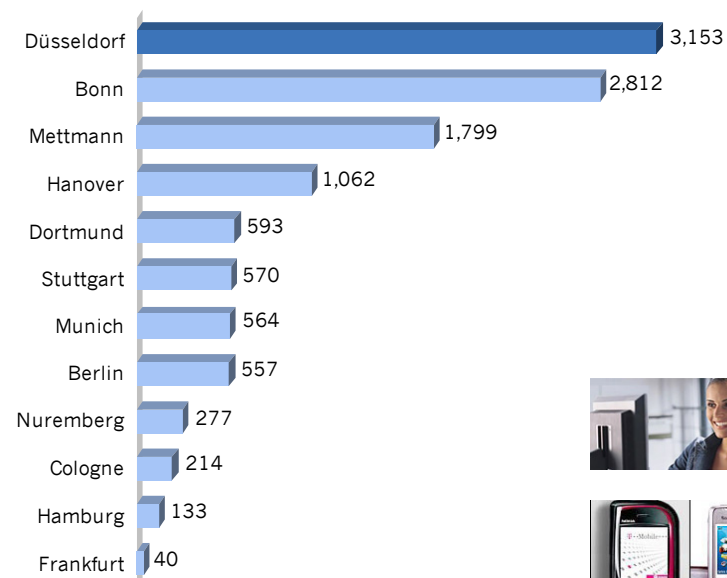
Key facts

- Top creative agencies
 - BBDO
 - Grey
 - McCann Erickson
 - the gate
 - Ogilvy & Mather
 - Dentsu
 - Saatchi & Saatchi
- Top media agencies
 - MediaCom
 - OMD
 - Mediaedge:cia
 - Zenithmedia
 - Optimedia
- 19.4 % of Germany's advertising sales
- 1,000 advertising agencies
- 8,000 employees in the advertising industry
- German Marketing Association e.V.
- Art Directors Club Düsseldorf
- PSI trade fair for promotional products
- Düsseldorf awards show of brands
- KreativKader Düsseldorf
- DAMK academy for marketing-communication

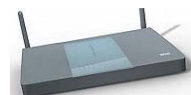
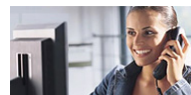
ICT Düsseldorf - A German Key Location

Mobile City Düsseldorf

Employees in wireless telecommunication services



Source: Federal Labour Agency, 2009. WZ08: 612.



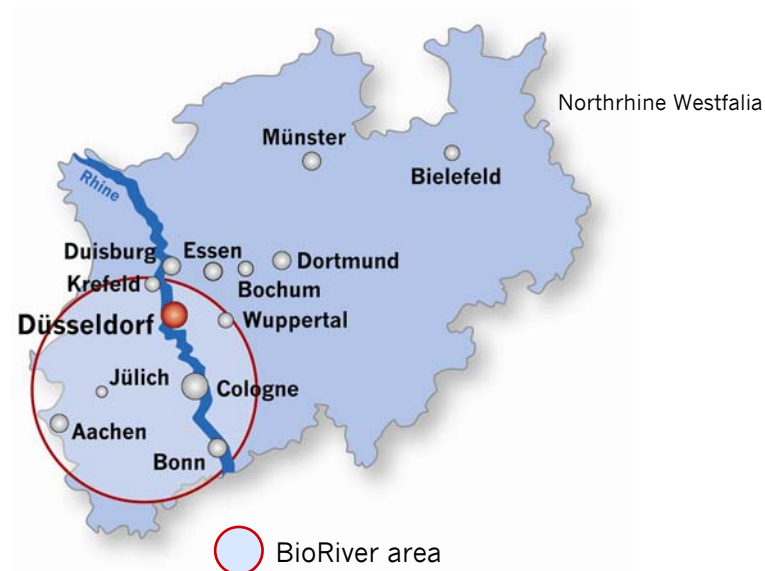
ICT-Facts Düsseldorf

- 1,500 ICT companies
- 24,000 ICT employees
- A dynamic market: 30 % of the ICT- companies were founded since 2002
- Many renowned headquarters or subsidiaries, e.g. Vodafone, E-Plus, Ericsson, Nokia Siemens Networks, Cisco, Huawei, Alcatel-Lucent, COLT Telecom, Versatel, IBM, Novell, Oracle, Renesas
- Over 30 telecommunications network service providers and operators serve the region with modern fibre-optic and mobile infrastructure
- Main business fields of Düsseldorf's ICT industry: Mobile Applications, Consulting, Internet Applications, Software Development, E-Commerce
- Important associations such as Digitale Stadt e.V., Mobile Monday e.V., Bundesverband Digitale Wirtschaft, VAF Bundesverband Telekommunikation e.V. and Gemeinschaft Fernmeldetechnik e.G.

BioRiver Düsseldorf - Germany's Research Stronghold

Powerful BioRiver Rhine Area

Among Germany's Top 4 Life Science clusters



Life Sciences in Düsseldorf

- The Düsseldorf Heinrich Heine University is one of the leading specialists for Life Science research in Germany.
- More than 50 % of the revenues of all German biotech companies listed on the stock exchange were generated by spin-offs of Heinrich Heine University.
- 76 highly innovative Life Science companies are established in the Düsseldorf area.
- 17,544 people are working in Life Science related jobs in the Düsseldorf area.
- 5,493 students enrolled in Life Science related subjects in the Düsseldorf area.
- Life Science Center with 21,000 sqm / 225,800 sqft office space, adjacent to the university.
- Networks/agencies:
 - LifeScienceNet Düsseldorf (Düsseldorf area)
www.lifescience-dus.de
 - BioRiver (cluster of the BioRiver area)
www.bioriver.de
 - Bio.NRW (Northrhine Westfalia area)
www.bio.nrw.de
- Research college Bio-Struct



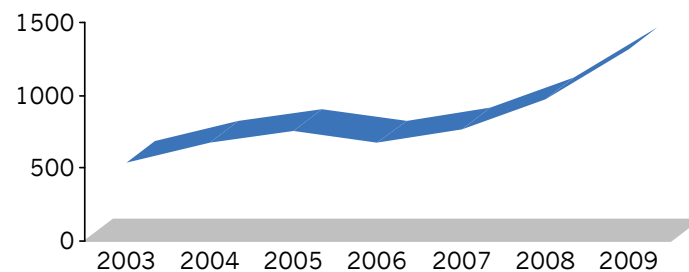
Düsseldorf - Dynamic Media Location in Germany

Media in Figures

- 2,000 companies in Audio-, Video-, Printsector
- 13,500 employees
- Continuous expansion of the city-area
“Media Harbor“
- Bambi Award City 2007
- Famous movie museum
- 46 Locations
- 70 TV and movie productions 2009

Popular Shooting Location

Days of shooting in North Rhine-Westphalia 2003 - 2009



Source: Filmstiftung NRW. The figure shows TV and movie productions which were sponsored by the Filmstiftung NRW.

Renowned Companies and Institutions

TV/Radio

- QVC
- DFA
- WDR Landesstudio
- ZDF Landesstudio
- NRW.TV
- Center TV Düsseldorf
- Antenne Düsseldorf

Film

- Vogelsänger Film
- Pictorion - Das Werk
- teleMAZ
- MPG
- New ID Filmproduction

Print

- Verlagsgruppe Handelsblatt
- Rheinisch-Bergische Druckerei- und Verlagsgesellschaft

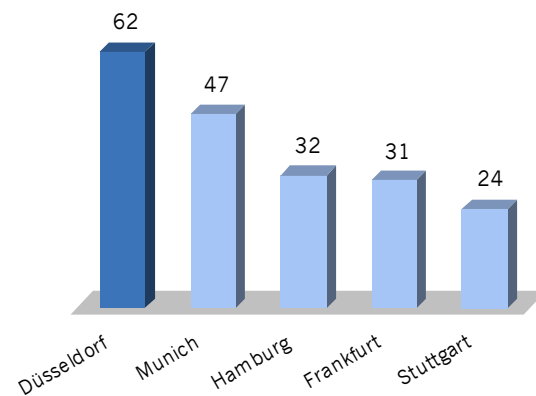
Associations

- Filmstiftung Nordrhein-Westfalen
- Landesanstalt für Medien NRW (LfM)
- College for Media Design
- Protestant academy of media

Do You Like Sports ? Düsseldorf Has Got it !

Outstanding Spot for Golfing

Golf Courses within an 50 km/30 miles area

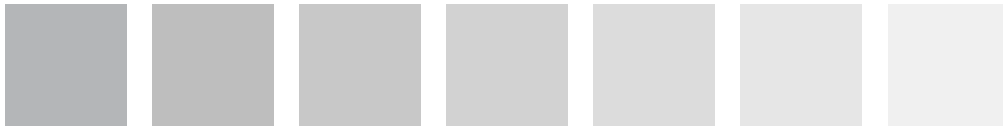


Source: German Golf Association.

Diversity of Sports (Examples)

- 117,000 members in 370 Sporting Clubs
- Several modern Sports Arenas (e.g. Esprit Arena with 51,500 seats, ISS Dome with 13,400 seats)
- 500 tennis courts, World Team Cup, ATP Award
- 27 riding halls, 18 sports clubs, Masters tournament
- Athletic sports: International indoor meeting (third best of the world)
- Long ski racing in the city
- DEG Metro Stars icehockey team
- Famous city marathon
- Germany's education centre for table tennis
- 6 marinas
- SportBusiness Event Management ranks 4 worldwide





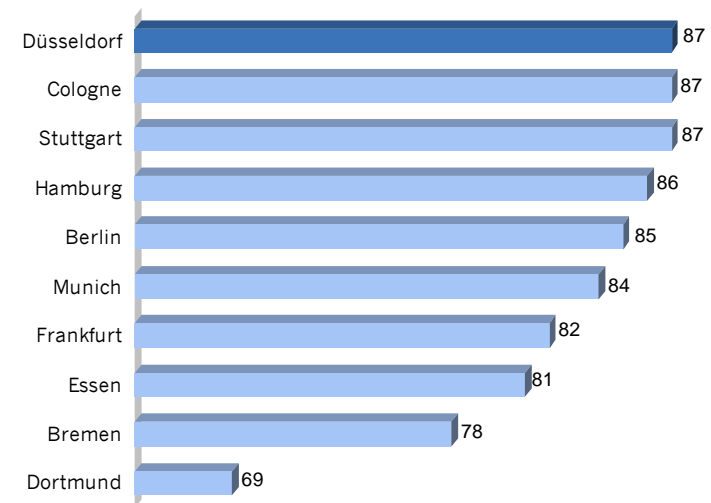
Düsseldorf - In the Spotlight of World's Art

Famous Spots of Culture

- K20, Art Collection Nordrhein-Westfalen
- K21, Art Collection at the Ständehaus
- Museum Kunstpalast
- Hetjens Museum (Ceramic Arts)
- Heinrich-Heine Institute
- Goethe Museum
- Academy of Arts
- German Opera on the Rhine
- Tonhalle (Symphony Hall)
- Antique- and Arts Fair
- Quadriennale 2010
- Important Cultural Awards:
 - Sponsorship Award for rising artists (visual arts, performing arts, music, literature)
 - Käutner Award (movie)
 - Art Award of the city Düsseldorf
 - Medici-Nadel Award (sponsoring of art)
 - Heine Award (literature and social commitment)

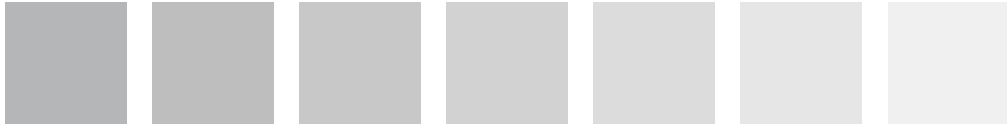
Best Evaluation of Düsseldorf Culture

People satisfaction with city's cultural life in %



Source: BAT Foundation for Future Topics.





City of
Düsseldorf

Living in Düsseldorf - Business meets Lifestyle

