

WIRELESS LEADS TELECOM GROWTH

In 2003, the German telecommunications market was the largest in Europe, valued at close to \$100 billion. Germany accounts for one fifth of Western European telecom revenues, and the industry is forecast to continue its strong growth, increasing by 3 to 3.5 percent in 2005.

Wireless telecom is the leading growth segment within the telecommunications sector. With close to 68 million subscribers as of September 2004, Germany has the largest number of mobile subscribers in Europe. However, Germany's 82.6 percent penetration rate remains below the EU average, and in particular below rates in other large European nations such as the United Kingdom and Italy. There is definitely room for growth in this market.

In 2003, German consumers were the heaviest users of wireless services in Europe. In 2003, mobile data revenues totalled nearly \$5.9 billion. Currently, mobile data services account for just under 20 percent of operator revenues.

This market is forecast to generate revenues of \$17.4 billion by 2007.

Canadian suppliers are already active in the German market and are gaining profile. The Siemens Communications division, which is responsible for carrier network



equipment, enterprise equipment and mobile handsets, has taken notice of the diversity of Canadian strengths, particularly in the wireless segment. The company frequently reviews Canadian firms for inclusion in its solutions portfolio.

Germany is also a good source of venture capital (VC) for Canadian telecom equipment and solution suppliers. Leading German VC firms such as Siemens Mobile Acceleration Group and T-Venture, the VC arm of Deutsche Telekom, have investments in Canadian firms.

Wireless is also making inroads into other telecommunications domains. Wireless hot spots based on the IEEE 802.11 standard are becoming ever more prevalent in Germany. WiMAX solutions based on IEEE 802.16 have also drawn interest. Arcor, one of the few fixed-line carriers competing directly with Deutsche Telekom, is currently reviewing the desirability of rolling out WiMAX networks to provide wireless broadband access in rural areas to its backbone trunk network.

Canadian exporters wishing to exhibit at trade fairs in Germany can choose from a broad selection of key events. The most important ICT trade fair in Europe is CeBIT, to be held March 10-16, 2005 in Hannover, Germany. Telecommunications will be a key sector at this comprehensive event.

For more information, contact Trade Commissioner Cliff Singleton at the Canadian Consulate in Munich at (011-49-89) 2199-57-17 or by e-mail at cliff.singleton@international.gc.ca.

CeBIT • Hannover, March 10-16, 2005
www.cebit.de • Canadian Pavilion on site

ANGA Cable • Cologne, May 31-June 2, 2005 • www.anga.de

SYSTEMS 2005 • Munich, October 24-28, 2005
www.systems-world.de/id.7672

Did you know...

- Germany is host of the world's oldest, largest and most important trade fairs. More than 90 percent of new products and technologies are introduced into the German market via trade fairs.

- In a recent Handelsblatt survey, over 1,000 European executives chose Germany as the "Mover of the Year".

- Germany is Europe's No. 1 importer of agri-food and seafood products from all over the world, with \$ 60 billion in 2003. Imports of organic products from Canada amounted to \$80 million in 2003.

- Today, there are more than 3.5 million Canadians of German descent, and German remains the fifth most frequently spoken language in Canada!

Are you ready for Germany?

Contacts and Web sites

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CANADA

International Trade Canada:
itcan.gc.ca

Canadian Trade Commissioner Service:
www.infoexport.gc.ca

Industry Canada's Strategis:
strategis.ic.gc.ca

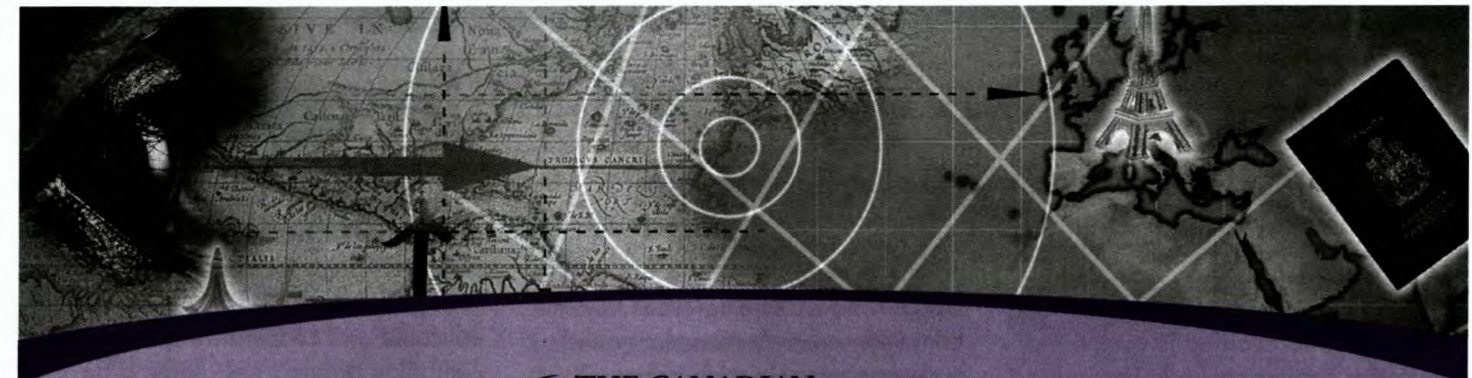
Export Development Canada:
www.edc.ca

Canadian Commercial Corporation:
www.ccc.ca/index.html

International Business Opportunities Centre:
www.iboc.gc.ca

Team Canada Inc:
exportsource.ca/go!exportsource/site.nsf

For detailed information on opportunities in other European countries, check the market reports and register for your personalized Web service at the Trade Commissioner Service site (www.infoexport.gc.ca).



THE CANADIAN
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Consular Services and the Canadian Trade Commissioner Service

You're traveling to Sao Paulo to meet new buyers? You're going to Beijing to provide after-sale service or flying to New Delhi to attend a trade show?

Through the Canadian embassies, high commissions and consulates abroad, Foreign Affairs Canada and International Trade Canada can contribute to the safety and success of your business trip. Here's how.

Access Foreign Affairs Canada's Consular Affairs Web site at www.voyage.gc.ca

Do I need a visa to enter Brazil? Are vaccinations required for travel in India?

Find out what's required for your trip and get the latest news and alerts for your destination at www.voyage.gc.ca. The site features publications on safe travel and in-depth travel reports for over 200 destinations worldwide, including information on:

- health and security issues
- the use of credit cards and monetary concerns
- personal documentation requirements
- contact numbers and addresses for Canadian embassies and other offices

How should I plan for a successful business trip?

Do your homework before you go. Contact the Canadian Trade Commissioner Service to obtain on-line access to valuable market and sector-specific information that matches your specific international business interests.

Where should I stay in Rio de Janeiro? Who should I hire as an interpreter in Shanghai?

For practical tips and guidance on planning your business trip, the Canadian Trade Commissioner Service offers a visit information service. You can request information on timing and how to organize your trip as well as a list of recommended hotels and qualified business service providers.

What's new on the Chinese market? How can I benefit from these opportunities?

Meet face-to-face with your trade commissioner in your target market to discuss the latest developments and your business needs, as well as upcoming trade events. Obtain valuable guidance and market intelligence in order to benefit from business leads specific to your company.

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If you lose your passport, are struck by illness or find yourself in trouble, you can call the nearest Canadian embassy, high commission or consulate for assistance. You can also call Consular Services in Ottawa collect at (613) 996-8885. This service is available 24 hours a day, seven days a week.

Because you are Canadian...

Through Consular Services and the Trade Commissioner Service, Foreign Affairs Canada and International Trade Canada are committed to helping Canadians make their business trips safe and successful, whether it's to Belo Horizonte or Mumbai. Bon voyage!

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