

HA Hessen Agentur GmbH



Hessen 2009

Facts and Figures

Hessen – there's no way around us.



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Economic Structure

Creative Industries in Hessen	4
Comparison of Select Structural Data among German States	5
Hessen and Its Government Districts 2008	6

Infrastructure

Hessen in Germany	7
German Passenger Airports	8
The Largest Airports in Europe	9

Financial Center Frankfurt

Banking Institutions	10
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Trade Fairs and Exhibitions

International Exhibition Grounds Frankfurt	11
– International Trade Fairs and Exhibitions	12

Employment Markets and Employment Rates

Development of Employment Rates	13
Employment Rates in the Industry and Service Sector	14
Unemployment Rates in Comparison	15
The Ten Largest Employers in Hessen	16

Chamber of Commerce and Industry

Statistical Data from the CCI	17
Job Training in Industry and Trade	18

Chamber of Skilled Crafts

An Informational Overview of Skilled Crafts in Hessen	19
Districts of the Hessen Chamber of Skilled Crafts	19
Companies of Skilled Crafts 2008	20
Training and Further Training in 2008	20

Hessen International

The Most Important Export Goods	21
The Most Important Trade Partners	22
Foreign Direct Investments in Hessen	23
Origin of Foreign Investment	23

Research and Development

Patent Applications	24
Selected Universities and Universities of Applied Sciences in Hessen	25

The Publishers

26

The creative industry is regarded as one of the most promising industries in Europe with a high level of growth potential. In the last decade, culture has become one of the most important location factors for the development of European cities and city regions. Cultural events, such as the Documenta in Kassel, the Rheingau Music Festival, the Frankfurt Book Fair, the Museumslandschaft Hessen-Kassel and the Frankfurt Museumsufer are examples of the quality of the cultural location Hessen.

Creative Industries as Economic Factors

Aside from being cultural events, creative talent has developed into an engine for economic development – as a requirement for innovative technologies and knowledge industries. The creative branches provide a substantial contribution to the entire economy in Hessen, therefore, playing an important role in the employment market.

In Hessen, approximately 37,000 companies in the Creative Industries contribute to the total economy

with approximately 130,000 employees and a revenue of Euro 21 billion making its revenue even higher than, for example, that of the local car manufacturers in Hessen.

The creative sectors of advertisement and public relations (PR), software and games, film, as well as architecture and publishing have experienced a considerable rise in sales since 2004.

Hessen – Creative Breeding Ground

The fields of advertising and PR, design, film and architecture are especially well represented in Hessen by excellent and diverse universities offering a wide range of courses. The universities in Offenbach, Frankfurt, Darmstadt, Wiesbaden, and Kassel are complemented by numerous private academies, for example the Frankfurter Akademie für Kommunikation und Design or the Institut für Marketing und Kommunikation (IMK) in Wiesbaden.

Numerous creative milieus are found in Hessen's university locations. The city of Kassel has an extreme-

ly appealing creative scene, because the University of Kassel is renowned for its creative courses that include documentary and cinematography. The cities of Marburg and Gießen distinguish themselves with discernible creative scenes that include alternative cultural activities and less by founders or small businesses.

Impulse for City and Country

Not only established cultural operations, but above all the young creative scene preserves diversity and liveliness in city-districts and initializes processes from which the city development in Frankfurt and other cities and regions in Hessen are able to profit. In smaller cities or municipalities in rural areas with a dwindling population, creative artists and small-business operators of the creative industry are able to initiate and contribute to sustainable development.

Economic Structure

Comparison of Select Structural Data among German States Selected German States 2008

	D	Hessen	Baden- Württemberg	Bavaria	Lower- Saxony	North Rhine- Westphalia	Rhineland- Palatinate	Saarland	Schleswig- Holstein
Area in km ²	357,104	21,115	35,751	70,552	47,625	34,086	19,853	2,569	15,799
Population* per 1,000	82,127	6,069	10,754	12,519	7,968	17,968	4,039	1,043	2,835
Residents per km ²	230	287	301	177	167	528	204	404	180
Unemployment Rate (as % of the dependent labor force)	8.7	7.4	4.6	4.8	8.6	9.4	6.4	8.0	8.6
Gross Domestic Product per Resident in the respective prices (EUR)	30,343	36,382	33,876	35,530	26,902	30,113	26,623	30,168	25,945
Gross Value Added (in billion EUR)	2,235	198	327	399	192	485	96	28	66
Primary Sector (in %)	0.9	0.5	0.7	1.0	1.5	0.6	1.3	0.2	1.5
Secondary Sector (in %)	30.1	24.3	39.3	31.5	30.6	30.1	32.9	35.9	22.2
Third Sector (in %)	69.0	75.1	60.0	67.5	67.9	69.3	65.8	63.8	76.3

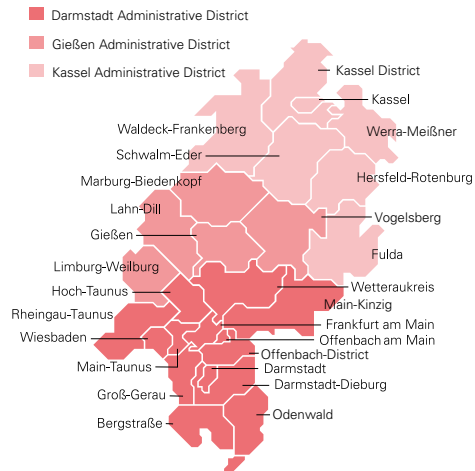
Source: Hessisches Statistisches Landesamt (Statistical Office), Statistisches Bundesamt (Federal Statistics Office), Arbeitsgemeinschaft VGR der Länder, own calculation

* Date June 30.

Economic Structure

Hessen and Its Government Districts 2008

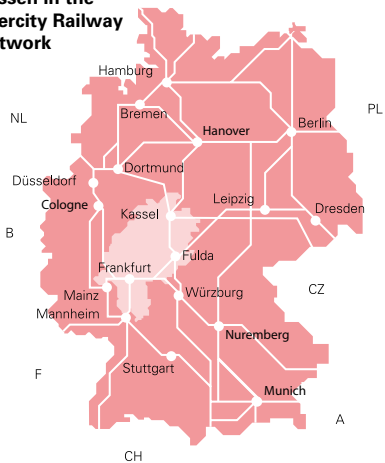
Administrative Districts	Area in km ²	Population* per km ²	Residents*	Labor Force Subject to Social Security 2008*		
				Total	Manufacturing Industry (%)	Service Sector (%)
Kassel	8,289	1,234,975	149	395,183	34	64
Gießen	5,381	1,050,475	195	315,694	36	63
Darmstadt	7,445	3,783,936	508	1,455,060	22	77
Hessen	21,115	6,069,386	287	2,165,892	27	73



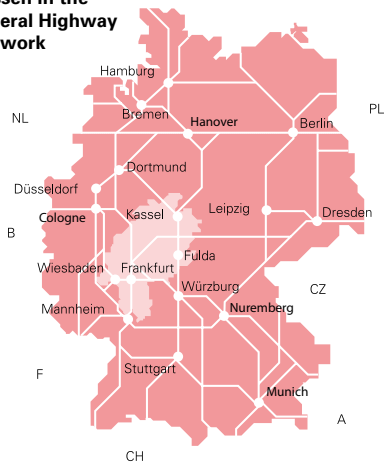
Infrastructure

Hessen in Germany

Hessen in the Intercity Railway Network



Hessen in the Federal Highway Network



Distances in km to

	from Frankfurt	from Kassel
Berlin	560	380
Bonn	175	260
Bremen	475	285
Dresden	464	409
Düsseldorf	230	235
Erfurt	269	190
Hamburg	539	310
Hanover	357	165
Kiel	599	400
Magdeburg	426	232
Mainz	40	225
Munich	423	508
Potsdam	515	319
Saarbrücken	204	415
Schwerin	607	411
Stuttgart	210	406
Wiesbaden	35	220

Infrastructure

German Passenger Airports Shares in the total traffic load pursuant to category (%) January to December 2008

	Aircraft Movements in %	Cargo in %	Passengers in %
Frankfurt Main	19.6	55.7	28.0
Munich	17.2	7.2	18.1
Berlin total	10.7	0.8	11.2
Düsseldorf	9.1	1.8	9.5
Hamburg	6.8	1.0	6.7
Stuttgart	6.4	0.8	5.2
Cologne/Bonn	5.6	15.4	5.4
Other	24.6	17.3	15.9

Fraport - Freight and Passage

- 20 % of aircraft movements
- 28 % of passenger volume
- 56 % of airfreight and mail volume

was processed in Frankfurt by December 2008.

In 2008, Fraport AG almost achieved the record-passenger number of 54.2 million from the previous year. Altogether 53.5 million passengers departed and landed in Frankfurt or made connections via Frankfurt.

The cargo volume at Frankfurt Airport decreased 2.7%. In 2008, 2.1 million tons of freight and mail were processed through Germany's largest airport – approximately one quarter less than in the previous time period. Aircraft movements also reduced slightly from the previous year with approximately 485,700 flights.

After a drastic reduction in air traffic, the Frankfurt Airport operating company sees signs of a recovery in air-transportation at the end of 2008.

Infrastructure

The Largest Airports in Europe Traffic performance pursuant to category 2008

	Aircraft Movements	Passengers (without Transit)	Cargo in t (without Transit)
Frankfurt Main	485,783	53,467,450	2,111,031
Paris Charles de Gaulle	559,816	60,874,681	2,280,050
London Heathrow	478,518	67,056,379	1,486,260
Madrid	469,740	50,824,435	328,985
Amsterdam	446,592	47,430,019	1,602,585
Munich	432,296	34,530,593	259,645
Rome	346,650	35,132,224	153,206

Airport City Frankfurt: The Benchmark for Mobility

The air-traffic numbers – whether passengers, aircraft movements or cargo – underline the airport's importance in regards to the ever-growing demand for worldwide mobility. Airport City offers high mobility through an optimal network of airplane, train, and car. It is an internationally leading intermodal traffic hub in the center of Europe with excellent connections worldwide.

- More than 317 destinations in 109 countries – 4,400 passenger flights per week
- Direct connection to Germany's largest highway hub in direction north/south (A5) and east/west (A3)
- Connection to the European high-velocity network of Deutsche Bahn (German railway) with more than 170 trains departing from the long-distance railway station a day
- Best regional connections with more than 230 trains departing from the local train station
- Own freight train station at CargoCity South

Financial Center Frankfurt

Banking Institutions June 30, 2008

Banks in Frankfurt (total)		325*
thereof:		
	Banks with Headquarters in Frankfurt	236
	thereof:	
	Foreign Banks	163
	Subsidiaries of Foreign Banks	43

Financial Center Frankfurt

With approximately 300 German and foreign banks, as well as the German Central Bank and the European Central Bank (ECB), Frankfurt enjoys a leading position in Germany and a prominent position on the European Continent:

- Approximately 75,000 people work in Frankfurt's financial services sector.
- More than 90% of the total German stock market turnover is earned in the financial center Frankfurt.
- Stock exchange trade: Number 6 among the world's stock exchanges.
- Futures market EUREX: Number 1 worldwide
- Since the introduction of the Euro monetary policy in the Euro currency sector is managed by the ECB from Frankfurt.

Source: German Central Bank

* Banks and subsidiaries with headquarters within and outside Frankfurt (is discontinued after 2005)

Trade Fairs and Exhibitions

International Exhibition Grounds Frankfurt Summary 2008

	Number	Share of Trade Fairs in Germany (%)
Trade Fairs and Exhibitions	42	27
Exhibitors	43,682	25
thereof: Inland	16,739	
Abroad	26,943	
Leased Area (in m ²)	1,422,605	20
Visitors	1,678,677	16

International Exhibition Grounds Frankfurt Global player in the center of Europe

The Frankfurt exhibition grounds, the third-largest in the world at 578,000 m², offers excellent conditions for exhibitors and visitors worldwide with its leading international fairs for consumer goods, lifestyle, textiles, automobile technology, architecture, and technology. Geo-central location, superb transport connection, direct flights to and from international airports, approximately 14,000 parking spaces and 90,000 beds make Frankfurt a most attractive exhibition center.

The trade fair organiser registered 102 trade fairs and exhibitions with approximately 69,000 exhibitors and 2.5 million visitors for the business year 2008.

397 congresses and events brought approximately 391,000 additional visitors to the Frankfurt location.

Trade Fairs and Exhibitions

Trade Fairs Calendar 2009-10 for Hessen

International Trade Fairs and Exhibitions (selection)

2009

10/14 – 10/18	Frankfurt Book Fair	Frankfurt am Main
11/03 – 11/05	Airtec – International Aerospace Supply Fair	Frankfurt am Main
12/02 – 12/05	EuroMold – World Fair for Moldmaking and Tooling, Design and Application Development	Frankfurt am Main
	turn&milltec – International Trade Fair for Turned Parts, Turning and Milling Technology	Frankfurt am Main

2010

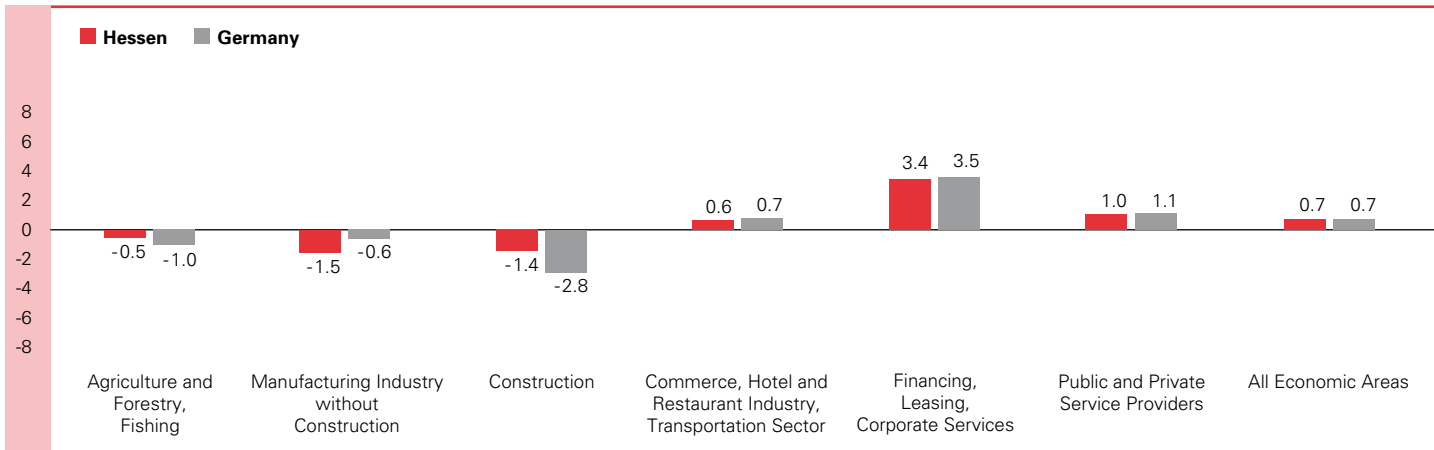
01/13 – 01/16	Heimtextil – International Trade Fair for Home and Contract Textiles	Frankfurt am Main
01/29 – 02/02	Christmasworld – Beautyworld – Paperworld – International Frankfurt Fair	Frankfurt am Main
02/12 – 02/16	Ambiente – International Frankfurt Fair	Frankfurt am Main
03/19 – 03/21	I.L.M. – International Leather Fair Offenbach – Winter Styles	Offenbach am Main
03/24 – 03/27	Prolight + Sound – International Fair of Technologies and Services for Events and Entertainment	Frankfurt am Main
	Musikmesse – Int. Fair for Musical Instruments, Sheet Music, Music Production and Music Business Connections	Frankfurt am Main
04/11 – 04/16	Light + Building – The World's Leading Trade Fair for Architecture and Technology	Frankfurt am Main
06/15 – 06/18	Optatec – International Trade Fair for Future Optical Technologies, Components, Systems and Manufacturing	Frankfurt am Main
07/02 – 07/06	Tendence – International Frankfurt Autumn Fair	Frankfurt am Main
09/14 – 09/19	Automechanika Frankfurt – The World's leading Trade Fair for the Automotive Industry	Frankfurt am Main
09/23 – 09/26	I.L.M. – International Leather Fair Offenbach – Summer Styles	Offenbach am Main

Employment Markets and Employment Rates

Development of the Employment Rates

Annual Average Fluctuations 1999 – 2008 in %

13



Employment Market and Employment Rates

Employees in the Industrial and Service Sectors

Labor force subject to social security contributions in June 30, 2008

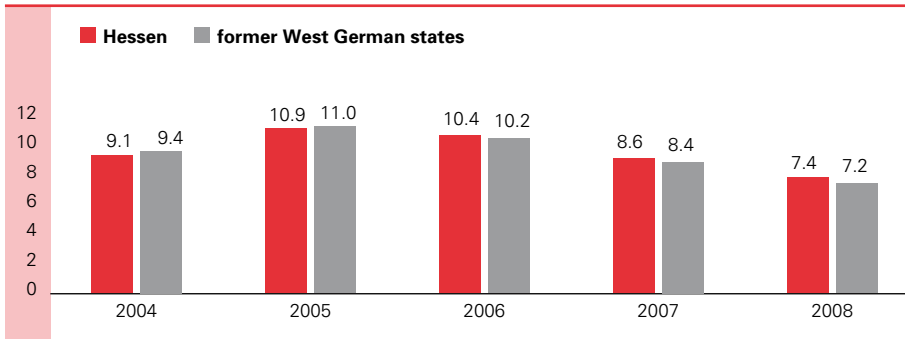
	Hessen total	Hessen in %	Germany in %
Industrial Sector	568,319	26.2	31.5
Including: Manufacturing Industry	430,907	19.9	23.8
Construction Sector	101,136	4.7	5.7
Services	1,589,233	73.4	67.7
Including: Automobile Trade, Maintenance and Repair	318,131	14.7	14.7
Transport and Storage	146,476	6.8	5.2
Hotel and Restaurant Industry	64,566	3.0	2.9
Information and Communications	80,587	3.7	3.1
Financial and Insurance Services	138,104	6.4	3.6
Economic Services	335,924	15.5	12.8
Public Administration, Social Security, etc.	128,478	5.9	6.1
Education and Training	65,747	3.0	3.7
Health Care and Welfare	228,083	10.5	11.8
Other Services, Private Households	83,137	3.8	3.9
Total number of labor force subject to social security	2,165,892	100.0	100.0

Employment Market and Employment Rates

Comparison of the Unemployment Rates in Hessen and the Former West German States

Development 2004 – 2008 in %

15



*Unemployed (%) of the dependent civil labor force, yearly average

Employment Market and Employment Rates

The Ten Largest Employers in Hessen

Ranking/Company Name	Branch of Trade	Employees in Hessen
1 Deutsche Lufthansa AG	Transport	37,000
2 Deutsche Bahn AG	Transport	23,800
3 Deutsche Post Gruppe	Telecommunication, Transport, Banking Industry	20,000
4 Rewe-Gruppe	Trade	19,000
5 Fraport AG	Transport	18,700
6 Deutsche Telekom AG	Telecommunication	16,900
7 Adam Opel GmbH	Automobile Industry	15,500
8 Volkswagen AG	Automobile Industry	13,200
9 Continental AG	Automobile Supplier	13,100
10 DZ Bank Group	Banking Industry	10,700

Chamber of Commerce and Industry

Statistical Data from the CCI

Registered Companies		Absolut 2007	2007 (%)	Changes 2006 – 2007 (%)
total		392,320	100.0	2.7
thereof:	Companies registered in the commercial register	104,116	26.5	3.4
	Companies registered in the co-op register	328	0.1	- 0.3
	Companies not registered	287,876	73.4	2.5

Economic Registered Companies According to Sector	Entered in commercial register			Not registered		
	Total 2007	2007 (%)	Changes 2006 – 2007 (%)	Total 2007	2007 (%)	Changes 2006–2007(%)
Manufacturing Trade Industry	14,504	13.9	- 0.4	17,033	5.9	15.9
Trade	29,435	28.3	0.5	90,978	3.6	- 0.4
Banking and Insurance Trade	2,717	2.6	6.5	17,674	6.1	0.9
Traffic, Telecommunication	4,792	4.6	2.2	12,972	4.5	0.3
Hotel and restaurant Industry	2,522	2.4	2.2	21,519	7.5	- 1.9
Service Sector	49,676	47.7	6.4	122,334	42.5	4.3
Agriculture and Forestry	469	0.5	3.8	5,366	1.9	5.3
Altogether (1 Commercial register company unassignable)	104,116	100.0	3.4	287,876	100.0	2.5

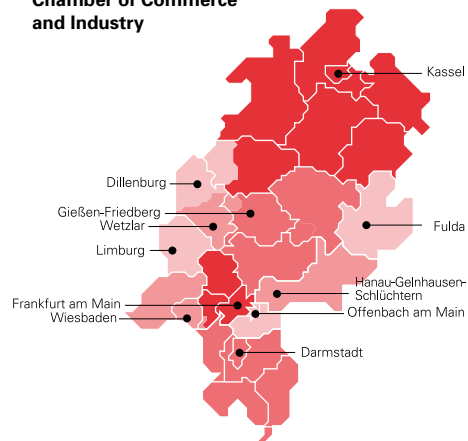
Chamber of Commerce and Industry

Job Training in Industry and Trade

Hessen, December 31, 2008

Total Trainees	66,704	Foreign-language Examinations	203
Commercial Professions	45,035	Management Experts	169
Including:		Business Experts	890
Banking Clerks	2,758	Business Administrators	1,180
Industrial Clerks	3,719	Industrial Managers	557
Office Occupations	7,692	Technical Experts	295
Retail Trade	10,416	Other (Data Processing, Writing Technology, Dietary Cook,	
Wholesale and Export Trade	2,636	Plant Security, Plant Burnisher, IT and Media)	77
Transportation	2,723	Other, Business Clerks (Consultant for Financial Services,	
Hotel and Restaurant Industry	6,628	Trade Assistants, Pharmaceutical Consultants)	243
Insurance/Financial Clerk	918	Commercial License Examinations	participants 2008
Industrial Professions	21,669	Transportation, total	183
Including:		Commercial Transport	65
Metal	10,279	Civilian Transport, Taxi and Car Rental	112
Electrical Engineering	5,436	Civilian Transport, without Taxi and Car Rental	6
Chemistry	2,544	Commercial License Arms Trade	0
Printing	1,415	Special Skills	participants 2008
Construction	967	Dangerous Goods Drivers (ADR)	1,175
Other (wood, textiles, foodstuff, glass)	1,028	Dangerous Goods Specialists (GbV)	51
		"Retail with OTC drugs"	56
Further Training Examinations total	6,508	Knowledge of a place (only CCI Frankfurt am Main)	616
Including:		Restaurant Training	
Instructor Examinations	2,894	(Training, no examination)	562

Districts of the Hessen Chamber of Commerce and Industry



Source: Chambers of Commerce and Industry

Chamber of Skilled Crafts and Small Businesses

An Informational Overview of Skilled Crafts in Hessen

	Changes in % to the previous year	
Business Information	2008	
Businesses, total	69,499	1.4
Skilled Crafts Businesses*	58,002	1.8
Skilled Crafts Related Businesses**	11,497	- 0.3
Employees***	350,500	0.0
Turnover*** (without VAT in billion EUR)	30.200	0.8
Information Training		
Trainees	30,404	0.4
thereof: Female	6,707	2.3
thereof: Non-Germans	2,720	1.9
New Training Contracts	10,669	- 5.3
Trade Examinations (passed)	6,950	- 7.1
thereof: Female	1,711	- 7.2
Master Craftsman Examinations (passed)	1,694	- 2.9
thereof: Female	341	- 5.8

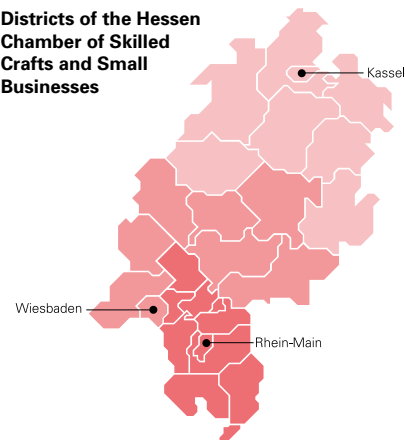
* Skilled crafts businesses requiring and not requiring admittance of Annex A and B1 of the Skilled Crafts Regulation

** Skilled crafts related businesses of Annex B2 of the Skilled Crafts Regulation

*** Estimate

Source: Chamber of Skilled Crafts and Small Businesses

Districts of the Hessen Chamber of Skilled Crafts and Small Businesses



Chamber of Skilled Crafts and Small Businesses

Skilled Craft Businesses 2008 Training and Further Training in Skilled Crafts 2008

Trade Group	Companies		Trainees		Trade Examinations (passed)		Master Craftsman Exams (passed)	
	total	in %	total	in %	total	in %	total	in %
Construction	16,063	23.1	4,897	16.1	1,067	15.4	301	17.8
Electric and Metal	18,284	26.3	13,270	43.6	2,785	40.1	740	43.7
Wood	4,048	5.8	1,806	5.9	482	6.9	83	4.9
Clothing	3,523	5.1	414	1.4	174	2.5	16	0.9
Foodstuff	2,947	4.2	1,736	5.7	413	5.9	134	7.9
Health	11,609	16.7	4,457	14.7	1,071	15.4	404	23.8
Glass, Paper, Other	1,528	2.2	364	1.2	74	1.1	16	1.0
Skilled Crafts								
Related Businesses	11,497	16.6	–	–	–	–	–	–
Other	–	–	3,460	11.4	884	12.7	–	–
Total	69,499	100.0	30,404	100.0	6,950	100.0	1,694	100.0

Important Economic Factor: Skilled Crafts

11 percent of the gainfully employed in Hessen are employed in skilled crafts.

29 percent of the gainfully employed in Hessen are being trained in skilled crafts businesses.

The Most Important Export Goods

Group of Goods (finished goods)	Exports 2008 in million €	Imports 2008 in million €
Chemical and Pharmaceutical Goods	12,745	8,499
Machines	6,375	8,140
Vehicles, Vehicle Parts and Accessories	5,381	10,823
Electrotechnical Goods	5,081	9,308
Iron and Metallic Goods	3,629	3,888
Fine Mechanical and Optical Goods	3,020	3,504
Goods from Synthetics	1,360	924
Paper and Paper Goods, Printing Goods	1,342	915
Natural Rubber Goods	1,268	1,151

Chemical and Pharmaceutical Industry – Most Important Export Goods

Hessen has always been an important business location for the chemical industry making up close to one quarter of its exported goods, followed respectively, by machinery with 12.4% as well as vehicles, vehicle parts and accessories with 10.5%.

In 2008 the export economy of Hessen amounted to Euro 51.4 billion – a 4.6% increase from the previous year. Imported goods into Hessen also increased from the previous year amounting to Euro 70.7 billion.

The Most Important Trade Partners of Hessen 2008

Export (special trade)			Import (general trade)		
Country	Hessen in million €	Share of total in %	Country	Hessen in million €	Share of total in %
France	4,606	9.0	United States	6,429	9.1
United Kingdom	3,838	7.5	France	6,331	8.9
United States	3,811	7.4	Belgium	5,515	7.8
Belgium	3,573	7.0	The Netherlands	5,314	7.5
The Netherlands	3,119	5.8	Italy	5,027	7.1
Italy	2,961	5.2	United Kingdom	4,667	6.6
Austria	2,689	5.1	People's Rep. of China	4,645	6.6
Spain	2,129	4.5	Switzerland	2,915	4.9
Poland	1,808	3.6	Japan	2,773	4.9
Export of the Countries	28,534	48.4	Import of the Countries	43,616	61.7
Total	51,352	100.0	Total	70,742	100.0

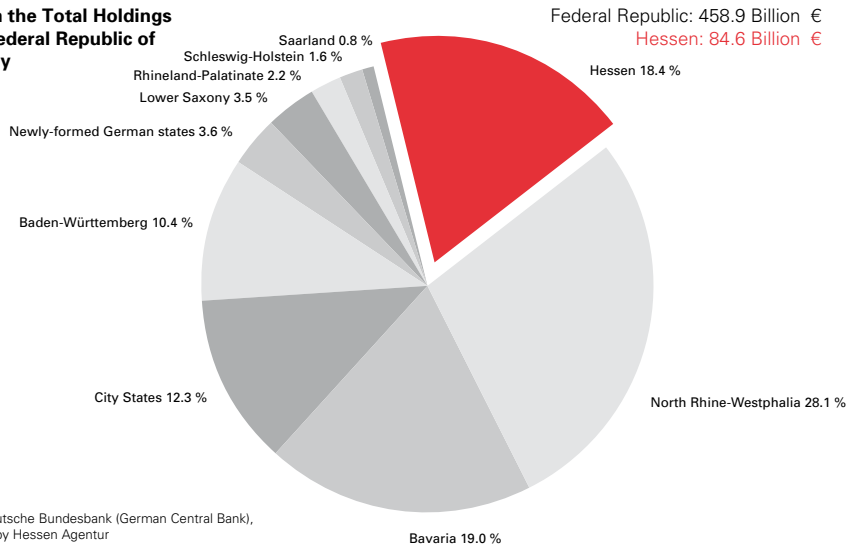
France is Hessen's Most Significant Trade Partner within the EU

The majority of foreign trade in Hessen is conducted with trade partners within Europe: In 2008, exports to European countries amounted to 72.3% while imports amounted to 67.2%.

The main buyer of products from Hessen remains France with Euro 4.6 billion and a share of 9%, followed by the United Kingdom with Euro 3.8 billion and a share of 7.5%. The most important trade partner abroad is by far the United States, with Euro 3.81 billion, a share of 7.4% of all exports.

Foreign Direct Investments in Hessen

Share in the Total Holdings in the Federal Republic of Germany



Source: Deutsche Bundesbank (German Central Bank), calculation by Hessen Agentur

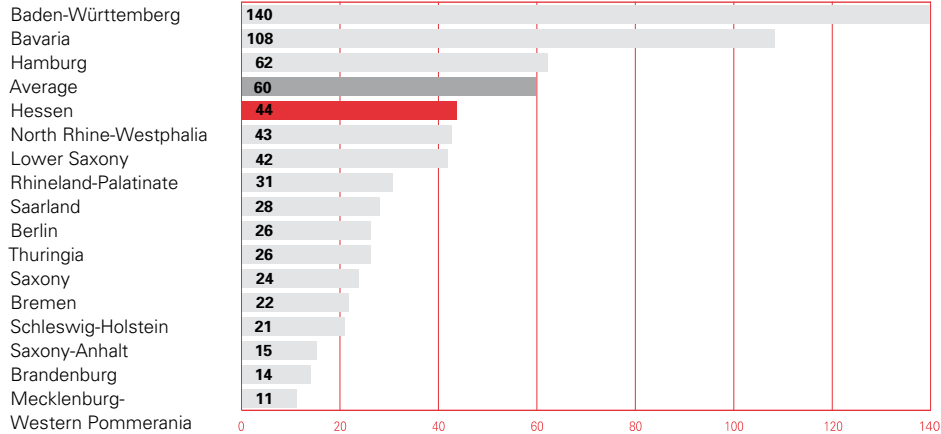
Origin of Foreign Investments

Country	in Billion €	Share in %
The Netherlands	18.8	22.2
United States	13.5	15.9
Switzerland	9.1	10.8
Luxembourg	8.7	10.2
United Kingdom	8.0	9.4
France	7.5	8.8
Republic of Korea	3.9	4.6
Spain	2.4	2.8
...		
Total	84.6	100

Research and Development

Patent Applications

Per 100,000 inhabitants 2008



Research and Development

Selected Universities and Universities of Applied Sciences in Hessen

Universities and Universities of Applied Sciences (selection)	Number of Students Winter Semester 2008	Majors (selection)			
		Engineering	Mathematics, Natural Sciences	Medicine	Law, Economics, Social Sciences
Technische Universität Darmstadt	18,175	■	■		■
Johann-Wolfgang-Goethe-Universität Frankfurt	32,961		■	■	■
Justus-Liebig-Universität Gießen	22,508		■	■	■
Universität Gesamthochschule Kassel	17,868	■	■		■
Philipps-Universität Marburg	19,142		■	■	■
European Business School, Oestrich-Winkel	1,323				■
Fachhochschule Darmstadt	10,172	■	■		■
Fachhochschule Frankfurt	8,967	■	■		■
Fachhochschule Fulda	4,719	■	■		■
Fachhochschule Gießen-Friedberg	10,167	■	■		■
Fachhochschule Wiesbaden	8,751	■	■		■
Europa-Fachhochschule Fresenius, Idstein	1,114	■	■	■	■
Total students at universities in Hessen	155,867				

The Publishers

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