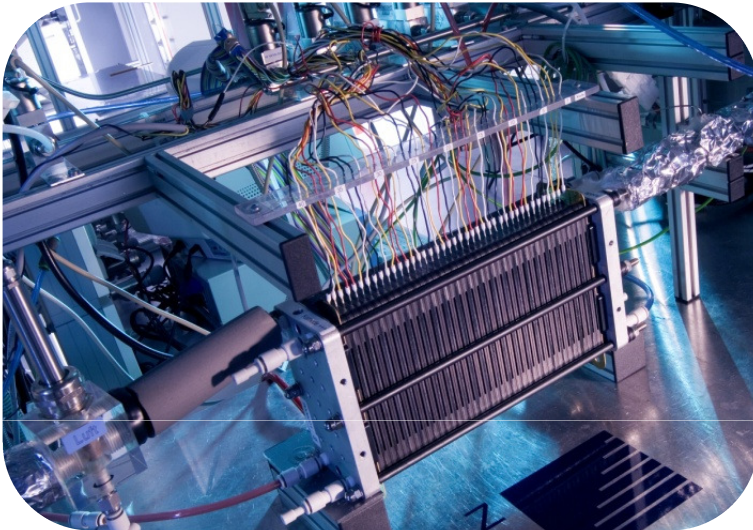


Germany Trade and Invest: National and Regional Expertise in Energy Storage and Fuel Cell Industry

Exhibit H2 + FC 2010, Hanover Fair, April 2010



Germany: Lead Market, Development Platform and Export Hub



Key Industries:

- Battery, fuel cell component and system manufacturers
- Technology providers and suppliers for the production, storage and distribution of hydrogen
- Hybrid power plant developers and system providers for the integration of renewable energies (power and heat)

The industry in numbers (2009):

- Fuel Cells: 1. market in Europe and 3. worldwide (for market share, HQ, production sites and R&D expenditures).
- 70% of European fuel cell pilot projects.
- 50% of production is exported.
- Energy Storage: Europe first region to require storage of renewable energies; Germany with the highest potential.
- Estimated hybrid power plant investment: EUR 330 million/a in Germany in 2020.
- Germany is both a pioneer and driver in both segments thanks to strong PV and wind clusters and smart grid/Mobility development.

A Complex Industrial, Regulative and Political Landscape



Energy Storage and Fuel Cell Industry

Key Issues and Key Players in One Industry Overview



Bundling Forces: Support from Different Institutional Experts



German Energy Agency (dena)

Headquarters: Berlin

Shareholders:

- The Federal Ministry of Economics and Technology (BMWi) in consultation with
- The Federal Ministry of Food, Agriculture and Consumer Protection (BMELV) and
- The Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU)
- The Federal Ministry of Transport, Building and Urban Development (BMVBS)
- KfW Bankengruppe , Allianz SE, Deutsche Bank AG, DZ BANK AG



National Organisation for Hydrogen and Fuel Cell Technology (NOW GmbH)

Headquarters: Berlin

Shareholders:

- The Federal Ministry of Transport, Building and Urban Development (BMVBS)

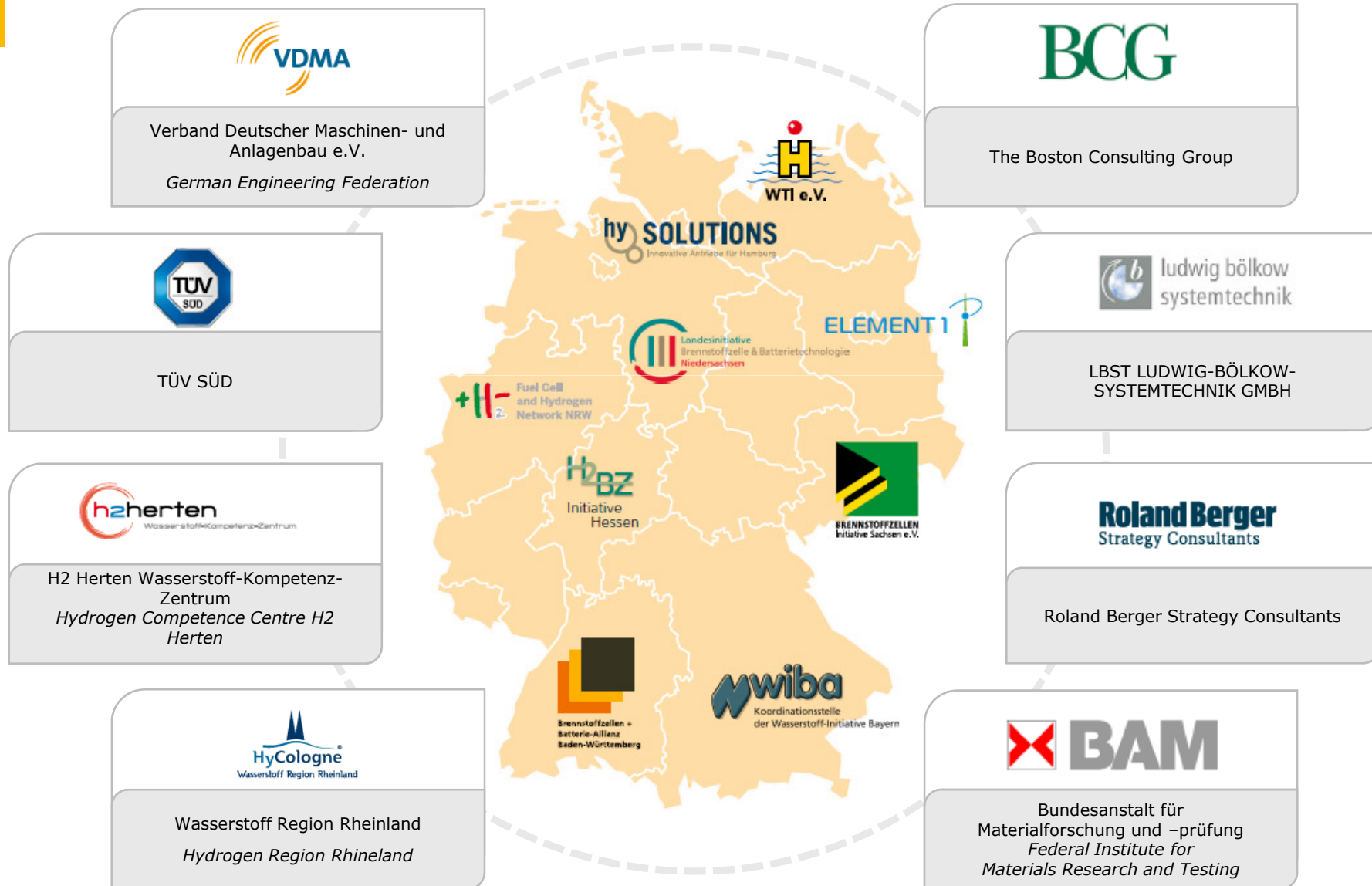


German Hydrogen and Fuel Cell Association (DWV)

Headquarters: Berlin

Members: over 300

National and Regional Expertise in Energy Storage and Fuel Cell Industry



- *Germany Trade & Invest* is the foreign trade and inward investment promotion agency of the Federal Republic of Germany.
- The agency is promoted by the Federal Ministry of Economics and Technology and the Federal Government Commissioner for the New Federal States in accordance with a German Parliament resolution.
- *Germany Trade & Invest...*
 - supports export-oriented companies based in Germany with comprehensive foreign market information.
 - promotes Germany abroad as a high-performance economic and technology location in order to attract investors who create/secure jobs in Germany.
 - consults potential foreign investors in terms of their settlement plans and realizes the required project management support in Germany.

An additional special focal point of activity lies in promoting the economic development of the new federal states including Berlin.

Two Headquarters in Germany - 46 Locations Worldwide



Partners

- *Germany Trade & Invest* works in close cooperation with the 120 German Chambers of Commerce Abroad (AHKs) in 80 countries across the globe.
- *Germany Trade & Invest* cooperates with all foreign trade promotion partners in Germany - and in particular with trade associations and chambers of commerce.
- The economic development agencies of the federal states are *Germany Trade & Invest's* partners within the investor settlement process in Germany.

Areas of Activity

For Companies in Germany (Exporters/Investors)

Foreign Country and Market Information

- Macroeconomic analyses and forecasts
- Country and industry analyses (over 125 countries)
- International projects and tenders
- Foreign economic and tax law
- Custom information and tariffs
- Practical business tips
- Business contacts and addresses

For Companies Abroad (Foreign Investors)

Information about Germany/Consultancy

- Identification of attractive markets and companies
- Economic framework in Germany
- Site specific information
- Industry specific information
- Direct contact with potential investors abroad
- Investor consultancy services
- Project management support

Germany Trade & Invest – Platinum Sponsor of the WHEC



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WHEC

- 18th World Hydrogen Energy Conference
- From 16 to 21 May 2010 in Essen
- Presentation
- Brochure release
- Meeting with investors & players

Bundling Forces: Support from Different Institutional Experts



The Deutsche Energie-Agentur GmbH (dena) – the German Energy Agency – is the centre of expertise for energy efficiency and renewable energy sources. It focuses on the development of sustainable energy systems which make optimum use of energy and integrate renewable energy sources. dena's mission is to generate economic growth and maintain prosperity with ever lower energy inputs. If this is to be achieved, energy must be generated and used in both a national and international context as efficiently, safely and economically as possible with the least possible impact on climate.



The National Organisation for Hydrogen and Fuel Cell Technology (NOW GmbH) was founded in 2008 by the German Federal Government, through an initiative of the Federal Ministry of Transport, Building and Urban Development (BMVBS). NOW's task is to coordinate and implement two federal programmes: the National Hydrogen and Fuel Cell Technology Innovation Programme (NIP) and the Model Regions Electric Mobility programme of BMVBS



Deutscher Wasserstoff-Verband (DWV) - German Hydrogen and Fuel Cell Association
Head Quarters: Berlin
Members: over 300

Contact

Germany Trade & Invest

Foreign Trade and Inward Investment Promotion Agency

Germany Trade and Invest
GmbH

Mr. Raphael Goldstein
Senior Manager

Friedrichstraße 60
10117 Berlin

Germany

T. +49 30 200 099-240
F. +49 30 200 099-111
Raphael.Goldstein@gtai.com

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Thank you!