



Business opportunities for ITC-Klaster's members.

Exploring collaboration possibilities between German agencies and Polish providers

DANIEL CZAPIEWSKI AND CHRISTIAN KOOP

Meet when working together for Jung von Matt Zürich
/ Warsaw:

- **working on multiple projects**, e.g. Reka (big swiss brand in the travel industry as well as financial industry incl. Relaunch and maintenance for many years); Frankly ZBK.
- **aligning the team setup and technical roadmap** discussing the way the swiss and polish team can work best together and develop in a mutual direction;
- regular exchange on a **one team approach**.



Technical Consulting Christian Koop (TCCK)



- **After 25 years on the agency side, I have decided to use my knowledge specifically for projects that appeal to me and that will help me progress. I would therefore be very happy to work with you. I have a developer background and worked for different agencies in Germany and Switzerland.**
- **Awards**
 - Helsana + App Implementing programmatic Ads (BOSW Bronze 2018)
 - Award 2019 for CKW, 2021 at Swiss-skills,
 - BOSW 2019 Bauwerk Parkett (Silver, Bronze), IBIS Hotels „Insta Sitter“ (Gold, Silver)
 - SDV 2020 Migros Grillierter Buddy (Headless CMS, WebApp)
 - BOSW 2021 Frankly ZKB (WebApp)

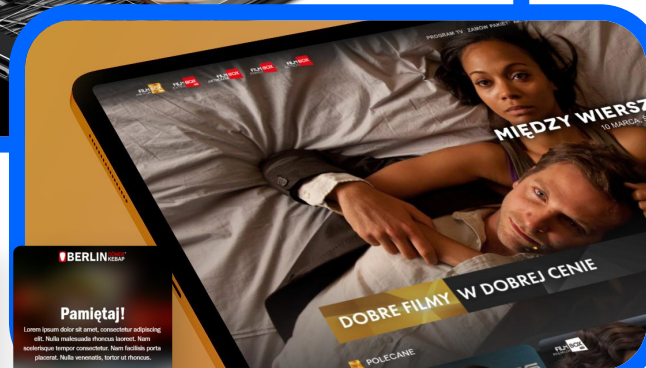
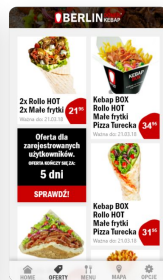
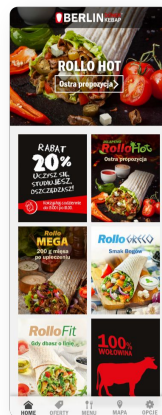
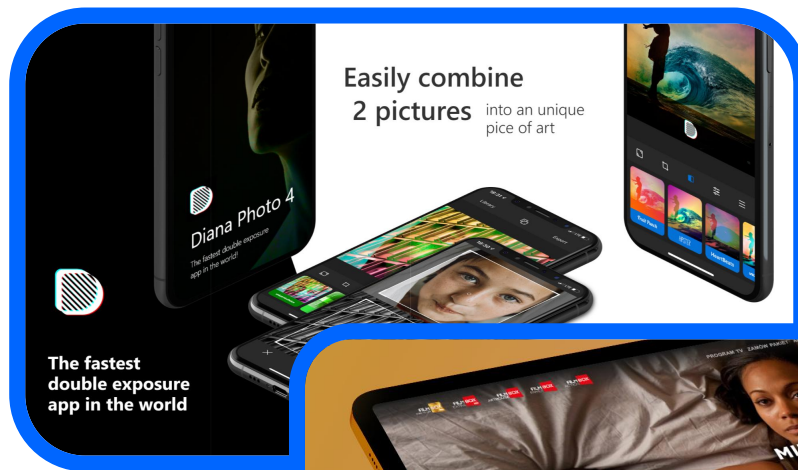
Technical Consulting Christian Koop (TCCK)

- Technical Consulting Christian Koop Inhaber was founded in 2024. The company is based in Hamburg, Germany.
- Extensive knowledge in a wide range of areas:
 - Projectlead, Project management
 - Platforms
 - Market launches of German premium manufacturers with high-load requirements
 - CMS based Sites
 - AEM (Enterprise)
 - Responsible for the global Master BMW-MINI
 - Magnolia (Enterprise and open source)
 - rewe.de incl. all interactive displays in app. 3.000 markets
 - Wordpress (open source)
 - thomassabo.com



STETTINER

- Over a decade of experience on the market
- Experienced, dedicated team
- Wide range of services
- Pioneers of Polish AR and VR mobile apps
- Experts in HMI interfaces
- Experience in Poland's largest agencies (multiple awards, including Effie Awards)
- Projects for leading global brands:
 - Żabka
 - Toyota
 - E.ON
 - L'Oreal
 - RedBull Mobile
 - Adidas
 - Amol itd.



Agenda

- Overview of German agency market & challenges
- Opportunities & Benefits
- Engaging with German Official Tendering Offices
- Tender Process and Partner Collaboration



Overview of German agency market & challenges

Market landscape and statistics

Diverse Market Players

The agency market in Germany consists of a wide range of players, from small startups to large firms, each contributing to the ecosystem.

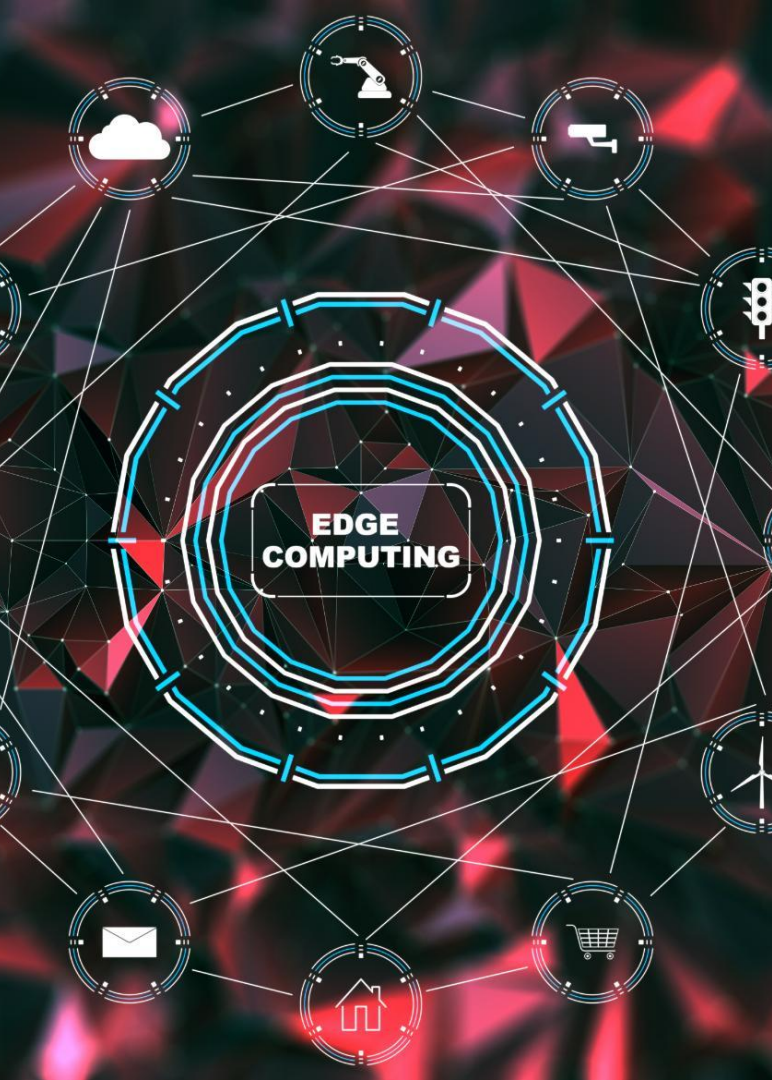
Growing Demand for Services

Recent statistics show a steady growth in demand for development services (expected 10%), indicating a positive trend for the industry.

Opportunities for Engagement

The growth in demand provides numerous opportunities for ITC-Klaster's members to engage with various agencies, fostering collaboration and innovation.





Common challenges faced by agencies

Intense Competition

Agencies often face fierce competition, requiring them to differentiate their services effectively in a crowded market.

Managing Client Expectations

Balancing client expectations is crucial for agencies to maintain satisfaction and ensure successful project outcomes.

Technological Advancements

Keeping up with rapid technological changes is a challenge that requires agencies to continuously adapt and learn.

Challenges (barriers) for Polish companies entering the German market

Language: Although English is commonly used in the IT industry, Germans often prefer business communication in German.

Cultural differences: Cooperation can be more formalized, with a strong emphasis on punctuality and precise arrangements.

Trust in local providers: German companies often already have long-standing relationships with local partners. Building such trust and relationships takes time, so it's important to make the best possible impression (e.g., by providing references, joining industry clusters, or participating in trade fairs).

Legal and tax differences: It is important to pay attention to German data protection laws (for instance, while GDPR is the overarching regulation in the EU, Germany has additional regulations such as the BDSG).

If a Polish company opens a branch in Germany or operates from Germany, tax regulations may involve extra formalities.

Competition and the strong position of local players: Germany is home to many well-established digital agencies, often with a long history and extensive sales operations. Competition is particularly strong in major cities (Berlin, Munich, Hamburg, Cologne).

Differences in contract structure and billing methods: German clients often expect more detailed contracts regarding the scope of work, service level agreements (SLAs), and contractual penalties (the so-called "Vertragsstrafe"). They may also prefer phased payments, for example in a fixed-price model with a clear timeline.



How to overcome or minimize these challenges?

Local partner or representative: Consider cooperating with a local intermediary (us :)) or establishing a branch in Germany to increase credibility.

Marketing in German: Have a German-language website, sales materials, and references; if possible, hire a native German speaker to communicate with clients.

Building a reputation: Give presentations at industry events, fairs, and conferences (e.g., DMEXCO in Cologne), and join industry organizations (e.g., Bitkom, BVDW).



LAST BUT NOT LEAST!

Delivering high-quality services:

The German market is very demanding when it comes to quality, timeliness, service stability, and customer support.

Trends on the German market (web and mobile development / digital services)

Growth in cloud and SaaS: German companies are increasingly moving to cloud solutions (AWS, Azure, Google Cloud). However, they still pay special attention to security and legal compliance (data residency, compliance).

Cybersecurity: There is a strong focus on data protection and system security. Companies look for providers that offer robust solutions in this area.

Industry 4.0 / IoT: As an industrial powerhouse, Germany places great emphasis on automation, process digitalization, and the integration of SCADA, MES, and ERP systems, among others. Agencies that can combine traditional web/mobile services with industrial system integrations have a competitive edge.

Mobile solutions and e-commerce: Demand for e-commerce platforms (e.g., Shopify, Shopware, Magento) adapted to the DACH market (Germany, Austria, Switzerland) is rapidly growing.

Mobile first: In Germany, approximately 60–70% of e-commerce traffic comes from mobile devices (though these statistics vary by industry).

Growing popularity of low-code/no-code solutions: Large companies are increasingly deploying low-code/no-code tools for faster prototyping. However, they need experienced partners capable of further developing and integrating these solutions.

Green IT and ESG: There is growing attention to ecological factors (server energy efficiency, sustainable development, supply chain transparency). Public and corporate projects increasingly take ESG (Environmental, Social, Governance) criteria into account.



Expectations for the coming years (2025-2026)

Consolidation and Independence Tension

The \$13 billion Omnicom-IPG merger, expected to finalize in 2025, will ripple into Germany, potentially consolidating larger agencies while sparking a countertrend of independent agencies flourishing. Clients may seek specialized, nimble firms as alternatives to mega-agencies, especially if holding companies prioritize scale over agility (Creative Salon, Waypoint Partners). **The bigger they get, the slower they get. Flexibility should be our plus.**

AI as a Core Competency

By 2026, AI adoption will likely deepen, with agencies not just using it for efficiency but as a differentiator—think AI-generated creative assets or hyper-personalized campaigns. Germany's tech hubs (e.g., Hamburg, Munich, Berlin) and government initiatives like the High-Tech Strategy 2025 will fuel this, though regulatory scrutiny on data privacy (e.g., GDPR) will shape its rollout (Mordor Intelligence). **Solutions for that market (EU) and for confidential use will be needed besides American big players.**

Economic Recovery Driving Budgets

If GDP growth ticks up to 0.7%-1.3% by 2026 as forecasted (European Commission), marketing budgets could rebound from 2024's dip (7.7% of revenue, per Gartner). Agencies will need to prove value through measurable outcomes, with WARC noting 65% of marketers expect business improvement in 2025 despite geopolitical risks like U.S. tariffs. **We can fill in here as solution where they might not be allowed to hire personnel or they don't find fitting people.**

Social Commerce Expansion

Platforms like Instagram (61.9% penetration) and TikTok, though less dominant in Germany than elsewhere, will grow as ad channels, with social commerce revenue projected to hit \$84.9 million by 2030 (Gaasly). Agencies will pivot to short-form video and influencer-driven strategies to engage Germany's 67.8 million social media users. **That will boost the ad agencies overall.**

Hybrid Work as a Standard

Remote and hybrid models will solidify by 2026, with agencies using tools like Splashtop for seamless collaboration. This aligns with Germany's focus on work-life balance and could widen talent pools, though it may challenge traditional agency cultures built on in-person brainstorming (Splashtop). **A good prerequisite for remote teams.**



Opportunities & Benefits

Opportunities - German agency perspective



Leverage Shared Resources

Collaboration allows agencies to utilize shared resources, enhancing their capabilities and reducing operational costs.

Enhance Service Offerings

By partnering with ITC-Klaster's members, agencies can broaden their service offerings and provide more comprehensive solutions to clients.

Tap into New Markets

Collaboration opens doors to new markets, allowing agencies to reach a broader audience and increase their client base.

Innovative Solutions

The partnership can spark innovative solutions, driving technological advancements and improving efficiency within agencies.



Enhancing capacity utilization (Klaster members)

Collaboration Among Agencies

Collaboration with agencies allows for better sharing of resources, fostering an environment of mutual support and increased productivity.

Optimizing Resource Allocation

Effective resource allocation ensures that every team member can contribute their skills efficiently, maximizing the overall output.

Increased Project Efficiency

By optimizing capacity utilization, we can enhance efficiency, leading to quicker turnaround times and higher stability of the Klaster's member.

Engaging with German Official Tendering Offices

Introduction to Tendering Opportunities



Lucrative Projects

Tendering opportunities in Germany present lucrative projects that can greatly benefit Klaster's members looking to get more business. Tenders are around 50.000 EUR to 500.000 EUR and even higher volumes.



Navigating Opportunities

STETTINER and TCCK provide guidance to partners (Klaster's members), helping them navigate the tendering process effectively and efficiently.



Maximizing Success

With the right support, Klaster's members can maximize their chances of success in securing tender contracts in Germany.

Budget range and potential projects

Importance of Budget Understanding

Understanding the budget range for tenders is essential for partners (Klaster's members) to ensure successful project implementation.

Alignment with Capabilities

Identifying projects that align with partners capabilities is crucial for maximizing resources and efficiency.

Role of STETTINER and TCCK

We provide valuable assistance in identifying suitable projects that meet financial and specialisational expectations of Partners.



Role of STETTINER and TCCK in Submissions

Support for partners

We provide essential support to Partners, guiding them through the tender submission process effectively.

Meeting Requirements and Standards

With our assistance, applications are ensured to meet all necessary requirements and standards for successful submissions.



Tender Process and Partner Collaboration

Scanning for relevant tenders (TCKK)

Tender Scanning Tools

TCKK provides an advanced service to identify relevant tenders to help Partners efficiently and effectively.

Importance of Early Identification

Identifying suitable tenders early in the bidding process is crucial for maximizing opportunities and ensuring success.





Alignment with Partners regarding tender tasks (TCCK / STETTINER / Partner)

Importance of Alignment

Aligning tender tasks among Partners is crucial for successful tender entering process execution and management.

Streamlined Execution

Alignment leads to a streamlined execution process, reducing delays and ensuring project success.

Successful Outcomes

Effective collaboration and alignment can significantly enhance the likelihood of achieving successful project outcomes.



Entering tenders in German tender portals (TCCK)

Guidance on Tender Submissions

TCCK offers comprehensive guidance for entering tenders into German portals, maximizing the chances of successful bids.

Efficiency in Processes

The guidance ensures that tender submissions are completed efficiently, minimizing errors and keeping the timings.

Conclusion

Opportunities for Collaboration

STETTINER and TCCK offer significant opportunities to collaborate with Partners to enhance project volumes.

Engagement with Tender Process

Engaging with the tender process allows STETTINER and TCCK to connect effectively with Partners and streamline project initiation.

Achieving Greater Success

By leveraging connections with STETTINER / TCCK, ITC-Klaster's members / Partners can generate additional revenue.

Thank you

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