

Metroplan

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collaborative Research
WHITEPAPER

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1. Introduction

Reliable production facilities or specialised logistic warehouses are key factors to ensure a functioning supply chain. Metroplan is specialised in consulting clients to determine the right location fulfilling individual requirements. The importance of choosing the right location has been painfully visualised to all of us when the war in Ukraine has started in the beginning of 2022 (bpb: Bundeszentrale für Politische Bildung, 2022). While the Ukraine featured attractive key factors such as below average labor costs, the production facilities and supply chains came to an immediate stop due to the political situation. This shock and warning signal has started a rethinking process on weighting the political stability.

Metroplan analyses and assigns weights to categories such as: economical, political, infrastructure, labor market, supply chain and environmental factors. The weighting supports the decision-making process to define the optimal location in the end. The war in the Ukraine is only one extreme example on how to weight the risk of disruption in production and logistics against the factor cost when it comes to the planning of a new location.

1.1 Research Goal

The overall goal of the research performed by HSBA on behalf of Metroplan is to investigate and question the current valuation of specific criteria influencing the decision making to choose a final location. Metroplan is questioning if the relevance of weighting for specific factors during the consultation period is still satisfying its customers in the long term. Although a location might have been chosen with the best available knowledge and expertise, having a factory operating in practice could reveal however,

that factors initially assigned with a high weight might not be of relevance and on the other hand, the client might have experienced issues with factors that have been presumed to be of low relevance.

To investigate this gap of actual experiences reported back to the theoretical decision making is a key part of the research goal. Furthermore, certain industry trends and developments shall be derived and assessed regarding their importance and relevance for Metroplan.

1.2 Research Scope

Knowing that Metroplan is consulting clients within different industries, companies in the seven most important fields of Automotive, Aviation & Maritime, Engineering, Electric & Medical, FMCG, Retail & E-commerce and Logistics are to be approached. The approach involves a detailed questionnaire as well as individual qualitative interviews with industry experts.

1.3 Methodology

The questionnaire covers both, quantitative as well as qualitative data. While the quantitative data supports the findings of specific trends through the various industries, the qualitative data of the questionnaire allows to deep dive into the details to understand and derive conclusions out of the findings. With the additional use of qualitative interviews, these findings can be underlined and proven. This was further underpinned by the conducted qualitative interviews, with

Derived trends out of the questionnaire are to be evaluated and discussed with the industry experts to gather a broader idea about the relevance as well as current importance of the derived key factors.

To ensure an unbiased outcome, HSBA acted independent from Metroplan and its clients.

participants from the real estate sector, experts in scientific research and the raw materials processing industry, as well as the mechanical and plant engineering sector. When creating the questionnaire (for both the qualitative and quantitative research), not only the hypotheses formulated at the beginning were taken into account, but above all the trends and current developments differentiated from the literature analysis described a main objective.

2. Literature Review

To derive the research goal, a proper theoretical background of current research has been asserted. At first, the literature history for applicable industries including selection methods has been reviewed, followed by sorting out the current relevant selection criteria, after which ongoing trends have been taken into consideration.

2.1 State of Research

Two different categorisation approaches for location selection criteria have matured in literature. In early studies, criteria have been referred to as qualitative and quantitative. Similar to the general definition, quantitative criteria are measurable. Example criteria are transport costs or labor costs. They can easily be used in mathematical models or scorings to derive conclusions. Qualitative criteria on the other hand can hardly be quantified

and used for comparisons but are still important to consider because quantitative data is not always sufficient alone. Example criteria are infrastructure and the labor market. Qualitative and quantitative criteria are also referred to as soft and hard criteria. Hard criteria are easily measurable and soft criteria are subjective (Melde 2015, 2–3). Figure 1 displays a catalogue of current selection criteria.

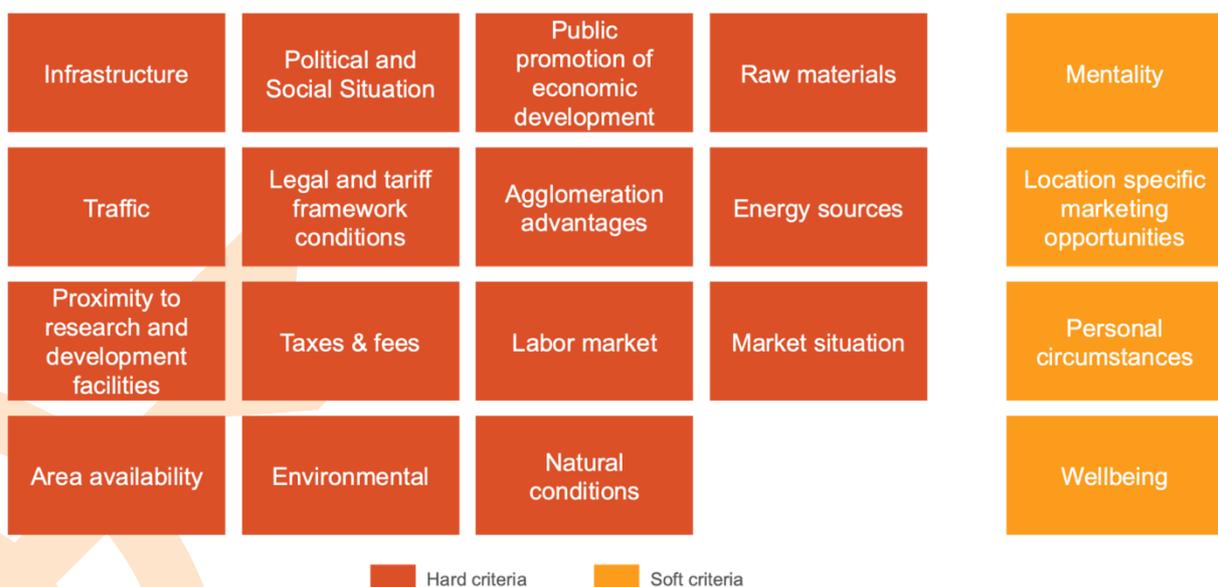


Figure 1 Catalogue of modern location criteria (Kreus, Lindner, and von der Ruhren Norbert 2004, 62)

Depending on the strategy of the company the prioritisation of the selection criteria varies. If the strategic goal is to acquire new business, the market potential is first and (Kinkel 2009, 66–75) foremost the essential location criteria. If cost reduction is the aim of a new location, labor costs and production costs are essential. Another strategic goal is the acquisition of technology knowledge for which the lead market location is the most important factor.

2.2 Current trends

By the time this research is carried out, the Ukraine-Russia conflict is very dominant in the media and with it the question: How does it impact the supply chain and potential location selection? The conflict is disrupting multiple areas including logistics, material shortage, energy prices, and labor shortages. The scale and future impact of mentioned disruptions is still unclear (Ollagnier 2022). The above-mentioned disruptions are also directly influencing the location selection criteria pointed out in the state of current research.

The strategic aim of a new location directly influences the weight of selection criteria (Kinkel 2009, 66–75).

Common methods to derive a conclusion, are scoring models and checklists. In the scoring model approach the different criteria are weighted and then rated with points to compare them. A checklist is helpful to discover “K-O” criteria, criteria which must be fulfilled. In practice, a mix is often applied (Melde 2015, 13).

Another topic that is currently discussed in the media is sustainability. Sustainability in e-commerce can have a positive impact on customer satisfaction (Ingaldi and Ulewicz 2019). Hence environmental awareness is a factor that can be taken into consideration during the process of location selection. Both trends are considered in the research process of this paper.

3. Evaluation Interviews & Survey

It can be found that the majority of the interview partners and participants of the survey are using the scoring matrix, dynamic investment procedures as well as checklists in order to evaluate the fit of a potential branch. Besides that, it can be seen that other approaches like statical investment procedures have considered a major lack of relevance.

Regardless of the chosen method for evaluating the fit of a possible future branch, the research has proven that different types of site selection factors are prioritised within the selection process. Economical and infrastructure-related factors are the most relevant ones considering the results from the expert interviews such as the conducted survey.



Economic Factors

From the given answers regarding economic factors, a currency stability such as an attractive tax environment and stable and good interest rates enjoy highest priority according to the participants.



Infrastructure Factors

Another important field is represented by the infrastructure-related factors as mentioned above. The seaport, the airport and the availability of gas and electricity are of great relevance in this respect. In countries which are based in Africa, South America or Asia the continuous supply of gas and electricity cannot be seen as granted.



Labor market-related Factors

When considering labor market related factors, the quality and quantity of the available staff which should potentially work at a new established branch is considered as crucial by the participants. Besides that, also the wage level of the workforce is considered and rated high. Additionally, but not as important as the other stated factors, possible barriers associated to language and culture are considered.



Supply-Chain Factors

The evaluation shows that, with regard to the supply-chain factors, proximity to the customer and proximity to the supplier play a particularly important role. COVID-19, and resulting dysfunctional supply-chains, have underlined this importance as many companies were not able to keep the delivery capability stable.



Political Factors

Besides the considered economic factors also political factors are showing less relevance for the participants when looking into the site selection process. Anyway, within the category of political factors the importance of the possibility to obtain regional subventions from a certain state or government when investing in an associated regional project were pointed out as important by the participants. Furthermore, participants examine the overall political orientation of the government for its economical fit. Besides these factors all participants also consider the domestic and external political stability of a certain country as essential.



Brand-specific Factors

Due to the increasing transparency of the supply-chains, brand-specific factors are considered as relevant. Companies which are producing for example in countries which are characterised by a high corruption index or bad labor conditions are facing increasing criticism.



Environmental Factors

Increasing environmental regulations by the government as well as the growing environmental awareness of the consumer leads companies to give more and more importance to the environmental factors. In addition, investors are increasingly encouraged to invest in companies which have a sustainability strategy.

Trends

Besides looking into the overall relevance of the different site selection factor categories the participants were also asked to state which category relevance they consider currently as most trending. Here it can be seen that supply chain related, and environmental factors are the most trending ones under the considered categories. Given these circumstances, it is important to highlight that the factors were currently

considered less relevant categories overall. Therefore, a shift in the relevant selection factor set is proven. Economical and infrastructural factors which are currently considered as the most relevant ones are also trending among the participants and will therefore stay relevant in the future considering the stated answers of the participants. The described characteristics can be seen in Figure 2.

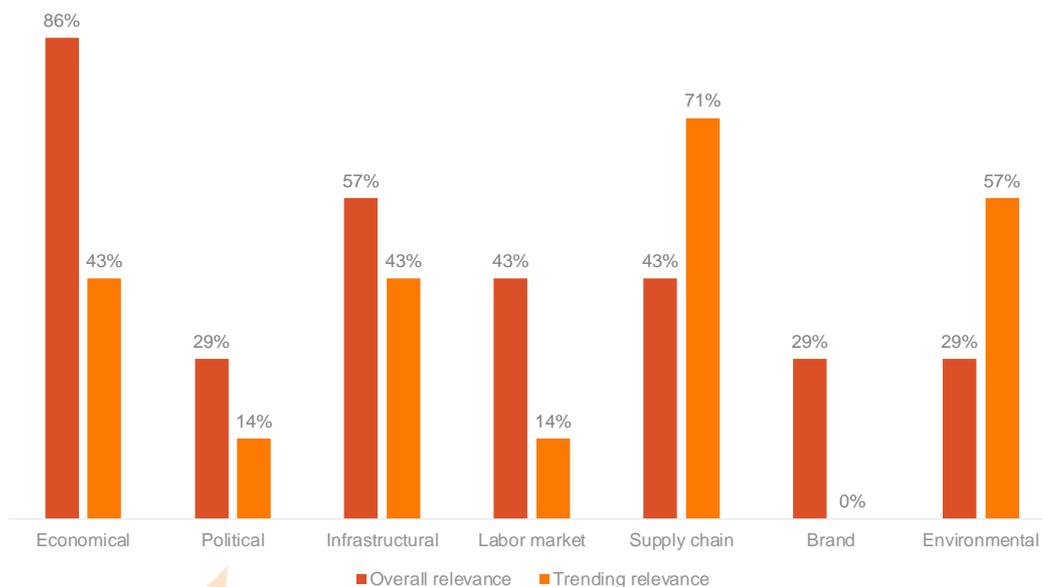


Figure 2 Overall relevance & trending site selection factors specified in total survey participation percentage

The relevance of currently not as important considered factors like political-, labor market- and brand-related factors will also not increase in the future as they were not trending among the participants – even under consideration of the currently given political circumstances like COVID-19, or the Ukrainian war.

In summary, the above graph, together with the previous evaluation of the data situation, can be presented as follows:

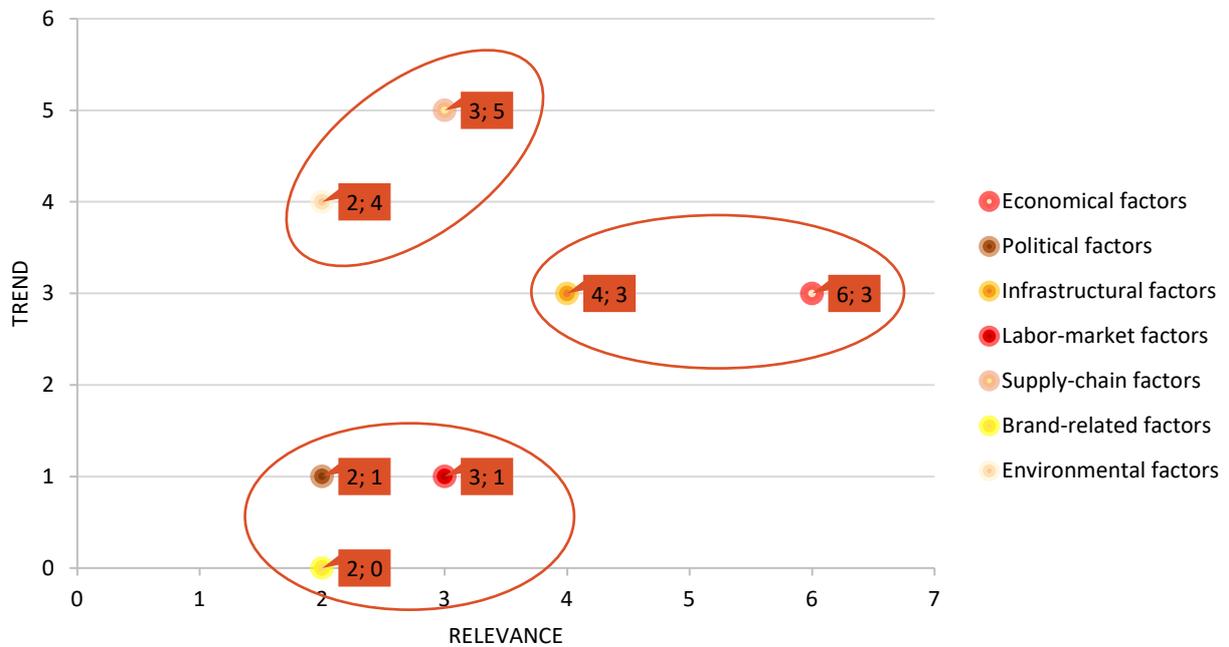


Figure 3 Site selection model: Trends vs. existing relevance

4. Results

In the following paragraph we are further evaluating the outcome of the survey into managerial implications that are to be taken into consideration, resulting in three major takeaways from the collaborative study.

4.1 Managerial Implications

First, it has to be mentioned that **economic factors** score by far the highest in the overall relevance. After studying the literature, that does not come with a

surprise, but this status should always be kept in mind while extrapolating all of the other lower ranked factors.

Circling back to the introduction and the current topic of **political factors**, the first observation when looking at the trends is the low importance given to political factors. It can be stated that the well-situated political situation in general within the EU leads to the point that the overall relevance of the category political factors was quite low in the past years. As a vast majority of

As an outcome from the literature, the questionnaire also highlights that **supply chain factors** are becoming more relevant. This factor should therefore be considered more intensively when entering the site selection process. The evolved globalization of supply chains is getting more complex due to increasing uncertainties that disrupt the known reliability. It is therefore a more crucial factor along the value chain. Proven is the

While comparing the scoring of **environmental factors** within overall relevance as well as relevance for trends, the effect of a current trend to environmental factors becomes obvious. ESG relation of bonds and investors along with necessary environmental activities in order to obtain

sites which have been established in the past years still have a stable political situation, incidents not directly affecting these sites might not cause immediate changes in managerial decision making. But it must also be clearly mentioned that the interviewed experts had no sites in the Ukraine.

trend to assign supply chain factors the highest importance, also by the fact that governments announced subsidies for the local production of semi-conductors to overcome the dependence on global supply chains (Koch, Hofer, & Olk, 2022). Keeping in mind the high importance of economic factors, the mentioned subsidies balance out the potential disadvantages in economic factors in a way.

cheap VC or financing play a key role here. But also, the macro trend sustainability takes influence on customer demand which demands an environmental site selection to the companies from their side.

Considering the results, **labor market** doesn't show the highest relevance. Nevertheless, different economic sectors show different requirements considering the labor market. Therefore, the

consideration of the labor market as a site selection factor should be considered individually depending on the potential need of workforce and employees.

The **factor infrastructure** has been proven to be a decisive factor in the past and remains to be important despite any trends. Infrastructure is a stable factor and due to

its nature not prone to change with trends. It should therefore always be considered as relevant and crucial.

Within the B2B sector focusing on non-final-product-brands that are not visible in public advertising, the **factor brand** is not considered as being relevant. In contrast, a

consumer brand might be more relevant as being actively recognized in the public as well as communicating its own CSR program.

Considering the analysis results above, the following weighting of the relevant decision factors can be derived:

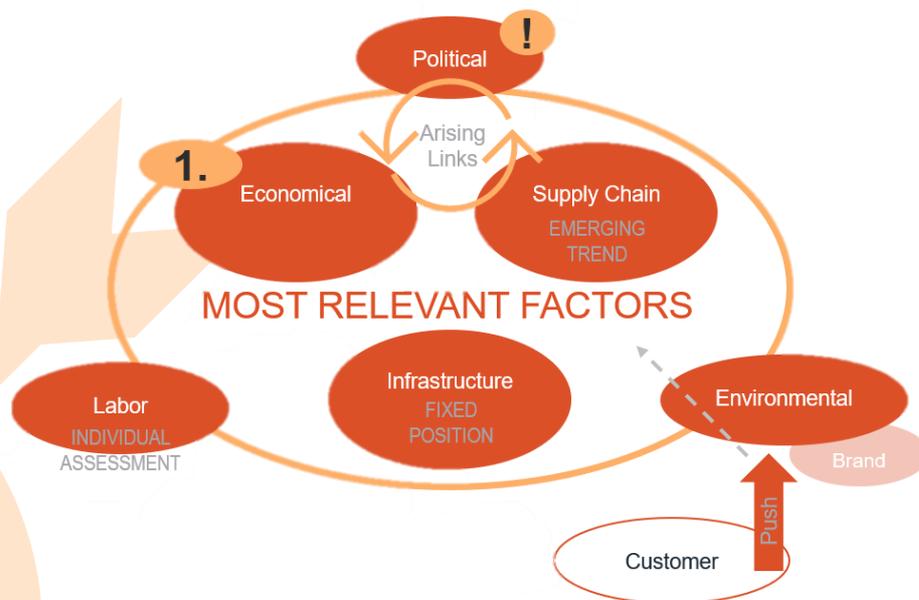


Figure 3 Weighting of relevant site selection factors

4.2 Key Takeaways

The managerial implications are resulting in three major takeaways.

Environmental demands driven by the customer

The increasing focus on meeting environmental expectations from the society and customer group are driving the importance to consider environmental factors for production.

The ongoing two major global crises, COVID-19 & the Ukrainian war, initiated beneficial consequences for the industry

The political reactions to these crises and the resulting decision making is causing the effect of combining advantages of 'foreign production' with the advantages of 'local production', since the political decisions are eliminating the disadvantages of 'local' production. These disadvantages are mainly in the fields of economic factors, which used to have a significant influence on moving to foreign

Supply Chain is the dominating trend

Tendency at the moment is to ensure a stable supply chain despite smaller margins, rather than the risk taking of higher margins with potentially disrupted supply chains.

production facilities. It has started with Trumps Amerika First policy, but the EU is currently on the same track with their politics (Koch & Damian, 2022). The reasons behind are different, but if this trend continues, it will significantly change the known weighting of the considered factors. The companies are attracted by subsidies and tax benefits to move their production as well as having a stable supply chain and less environmental issues as a side effect.

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Appendix

	Alexander Wolff	Günter Hörschemeyer	Marie Werther
1. Welche Methoden sind Ihrer Meinung nach gängig bei der Standortauswahl (bitte Kreuz setzen oder sonstige ergänzen):			Scoring Matrix: scoring beinhaltet meist Standort- und Gebädefaktoren, die gewichtet werden, sodass der Score ausgeben und die einzelnen Optionen gerankt werden können (zur Miete; für Investmentprojekte kommen intensivere Kalkulationen dazu. Mieter oder Käufer kalkulieren sich dies meist intern durch)
Scoring-Matrix/ NWA (qualitativ)	X	X	X
Checklisten-Verfahren (qualitativ)			
Statische Investitionsverfahren (quantitativ)	X	X	
Dynamische Investitionsverfahren (quantitativ)			
Sonstige:			
2. Aus welchen der unten genannten Kategorien würden Sie Standortauswahlfaktoren in einem Auswahlprozess berücksichtigen (bitte Kreuz setzen oder sonstige ergänzen):			
Wirtschaftliche Faktoren	X	X	X
Politische Faktoren	X	X	X (meist weniger relevant)
Infrastrukturbezogene Faktoren	X	X	X
Arbeitsmarktbezogene Faktoren	X	X	X
Supply-Chain-bezogene Faktoren	X	X	X
Markenspezifische Faktoren		X	X
Umweltpolitische Faktoren	X	X	X
Sonstige:		Digitale Faktoren	
3. Welche wirtschaftlichen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Währungsstabilität, Kosten (Administration, Steuern, Personal), Transaktionssteuern innerhalb eines Landes	Wechselkurs, Marktvolumen, Kosten (Miete, Personal), Klassiker der Standardliteratur	übliche Faktoren wie Preis, Ausbaubudget, Mietfreizeit etc.
4. Welche politischen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Innen- und Außenpolitische Stabilität, Korruptionsindex, Sicherheit von Eigentum	Innen- und Außenpolitische Stabilität	politische Stabilität (Innen- und Außenpolitisch)
5. Welche infrastrukturbezogenen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Hafen, Flughäfen, Gas & Strom für Produktionen	Hafen, Straßennetz, Flughafen	Anbindung an Autobahnen / Flughäfen / Häfen etc. für Produktion und Logistik außerhalb der Ballungszentren. Anbindung an ÖPNV für mgl. Angestellten Zielgruppe
6. Welche arbeitsmarktbezogenen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Verfügbarkeit von Arbeitskräften	Qualität sowie Quantität der Arbeitskräfte, Lohnkosten, sprachliche & kulturelle Barrieren	Stadtnähe und Anbindung als Faktor in der Verfügbarkeit von Arbeitskräften, Anforderungen einiger Branchen an Standort und Größe der Flächen
7. Welche Supply-Chain-bezogenen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Nähe zum Kunden, Nähe zum Lieferanten, kurze Wege (aus welchem Land welche Märkte)	kurze Wege, regelmäßige Anbindungen	Anbindungen an relevante Stakeholder, Relevanz unterschiedlicher Märkte und deren Anbindung

8. Welche markenspezifischen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	/	Korruptionsindex - Image eines Landes	Globalisierung des Absatzmarktes macht Produktionsstätten und die Vertriebs-Standorte unabhängiger. Relevanter ist die Knüpfung an regionale Branchen wie z.B. Seefahrt/ Fracht / Hafen. Verbleib in der angestammten Region außer in Fällen der Expansion üblich (Beispiel die Stadt Wolfsburg und VW; hier wird die Marke mit dem Standort assoziiert)
9. Welche umweltpolitischen Faktoren würden Sie in der Standortanalyse berücksichtigen (bitte auflisten):	Möglichst kurze Lieferkette zu Hauptabsatzmärkten	Regularien und Auflagen in Bezug auf CO2-Ausstoß, Förderung von Nachhaltigkeitsprojekten	vorherrschende politische Gegebenheiten/mögliche Einschränkungen und Vorgaben
10. Bitte ordnen Sie die einzelnen Standortauswahl-Kategorien absteigend, beginnend mit der für Sie am relevantesten Kategorie (bitte nummerieren):		individuell von Unternehmen zu Unternehmen, Arbeitsmarkt am einfachsten zu steuern (über Löhne bspw.)	
Wirtschaftliche Faktoren Politische Faktoren Infrastrukturbezogene Faktoren Arbeitsmarktbezogene Faktoren Supply-Chain-bezogene Faktoren Markenspezifische Faktoren Umweltpolitische Faktoren	1 3 4 5 2 7 6	1 3 4 7 2 6 5	7 1 6 5 3 4 2
11. Welche der Standortauswahl-Kategorien haben über die letzten Jahre besonders an Relevanz gewonnen (bitte Kreuz setzen oder sonstige ergänzen):		Digitale Strukturen, Sustainability	
Wirtschaftliche Faktoren Politische Faktoren Infrastrukturbezogene Faktoren Arbeitsmarktbezogene Faktoren Supply-Chain-bezogene Faktoren Markenspezifische Faktoren Umweltpolitische Faktoren Sonstige:	X X	X X	X X
12. Warum haben die von Ihnen oben ausgewählten Kategorien in den letzten Jahren an Relevanz gewonnen?	Lieferkettenproblematik, Nachhaltigkeitsaspekte (kurze Wege)	Anforderungen von Stakeholdern und Investoren steigen in Bezug auf Nachhaltigkeit	Umwelt: stärkeres Umweltbewusstsein des Endverbrauchers und der Mitarbeiter sowie ESG Auflagen & Co. / Politisch: instabiles politisches Klima, Teilweise Rückkehr der Produktion ins Inland.
13. Welche der Standortauswahl-Kategorien haben über die letzten Jahre besonders an Relevanz verloren (bitte Kreuz setzen oder sonstige ergänzen):			
Wirtschaftliche Faktoren Politische Faktoren Infrastrukturbezogene Faktoren Arbeitsmarktbezogene Faktoren Supply-Chain-bezogene Faktoren Markenspezifische Faktoren Umweltpolitische Faktoren Sonstige:			
14. Warum haben die von Ihnen oben ausgewählten Kategorien in den letzten Jahren an Relevanz verloren?	Keiner, eher erweitert bzw. gestärkt	es sind Punkte bzw. Kategorien dazugekommen, existierende sind nicht zu vernachlässigen, lediglich Änderung der Gewichtung	keiner der Punkte verliert an Relevanz, diese verschiebt sich eher und Kategorien wie Digitalisierung kommen dazu
15. Welche Standortauswahl-Kategorien haben bei der Suche nach einem neuen Vertriebs-/ Verwaltungsstandort für Sie die höchste Relevanz (bitte nummerieren):			

Wirtschaftliche Faktoren	1	1	1
Politische Faktoren	5	5	7
Infrastrukturbezogene Faktoren	3	2	2
Arbeitsmarktbezogene Faktoren	4	4	3
Supply-Chain-bezogene Faktoren	2	3	5
Markenspezifische Faktoren	7	6	3
Umweltpolitische Faktoren	6	7	6
16. Welche Standortauswahl-Kategorien haben bei der Suche nach einem neuen Produktionsstandort für Sie die höchste Relevanz (bitte nummerieren):			
Wirtschaftliche Faktoren	3	1	1
Politische Faktoren	5	5	5
Infrastrukturbezogene Faktoren	4	4	3
Arbeitsmarktbezogene Faktoren	1	2	2
Supply-Chain-bezogene Faktoren	2	3	4
Markenspezifische Faktoren	7	7	7
Umweltpolitische Faktoren	6	6	6
17. Welche Standortauswahl-Kategorien haben bei der Suche nach einem neuen Logistikstandort für Sie die höchste Relevanz (bitte nummerieren):			
Wirtschaftliche Faktoren	3	3	3
Politische Faktoren	5	4	5
Infrastrukturbezogene Faktoren	2	2	1
Arbeitsmarktbezogene Faktoren	4	5	4
Supply-Chain-bezogene Faktoren	1	1	2
Markenspezifische Faktoren	7	7	6
Umweltpolitische Faktoren	6	6	7
18. In welchem Unternehmen sind Sie derzeit tätig?	Norevo GmbH		Robert C. Spies
19. In welcher Branche ist Ihr Unternehmen tätig?			
Luftfahrt und Schiffbau			
Maschinen- und Anlagenbau			
Elektro-/ Medizintechnik			
Automotive			
FMOG			
Handel / Mode/ eCommerce	X		
Logistikdienstleistungen			
Sonstige:			Gewerbeimmobilien
20. Wie lautet der Titel Ihrer Position?	Strategic Management		Key Account Management
21. Wie viele Mitarbeitende beschäftigt Ihr Unternehmen?			
1 - 20			
21 - 50			
51 - 100			
101 - 250			X
250 - 1.000	X		
1.000 +			
22. Wie viele Standorte hat Ihr Unternehmen?			
1 - 5			
6 - 10	X		X
11 - 25			
26 - 50			
50 +			
23. In welchem Land befindet sich der Hauptsitz Ihres Unternehmens?	Deutschland		Deutschland
24. In welchen Regionen von Europa hat Ihr Unternehmen einen Standort?			
Nordeuropa			
Westeuropa	X		X
Mitteleuropa			
Osteuropa	X		
Südosteuropa			
Südeuropa			
25. An welcher Forschungseinrichtung sind Sie derzeit tätig?		Nordakademie, Fresenius, Northern Business School	
26. Wie lautet der Titel Ihrer Position?		Freiberuflicher Dozent	

Team Set-Up



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