

BROAD- CASTING IN THE POST- BREXIT ERA

**Berlin-Brandenburg:
The Media Hub at the
Heart of Europe**



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DEAR READER,

According to the writer Jean Paul, Berlin is not so much a city as a part of the world. This is all the more valid when you see Berlin not just as a metropolis, but as the core of a diverse, lively – even endearing region.

At Rundfunk Berlin-Brandenburg, we create audiovisual programmes distributed around the world via all kinds of broadcasting channels. It was our good fortune to originate from this great city of Berlin, surrounded by the wonderful state of Brandenburg. From the very first day of broadcasting, we have benefited from the unique interplay of creative will, history and curiosity that takes place every day in the centre of the European continent.

Right on our doorstep we find exciting stories, fascinating people, refreshing ideas and seasoned experts – in other words unique raw material and expertise for almost any format we want to broadcast on television, radio or the Internet.

The environment is made all the more exciting by the coexistence of a cultural free spirit, artistic talent, political power and historical heritage which can only be found here. Today, the creative minds of our industry from all over the world call Berlin their home and shape the media of the future in the heart of a city that reflects the brightest and darkest hours of German and European history at every corner.

Being able to call Berlin and Brandenburg home as a broadcaster is a precious gift. If we weren't here already, we would do just about anything to come here.

Patricia Schlesinger,
Director General of the rbb



BREXIT: THE GAME

The way non-domestic television channels broadcast to EU markets is similar to "passporting" in the financial sector, i.e. under EU law, **a broadcasting licence granted by the UK** regulator Ofcom must be recognised by any other EU member state.

Once the UK has formally left the EU, this recognition **will no longer be granted** and alternative arrangements will have to be made for securing access to the broadcasting markets of EU member states.

This means conditions for the retransmission in Germany, France, Italy, or Spain of programmes produced in the UK **must be renegotiated**.



EU law in a nutshell

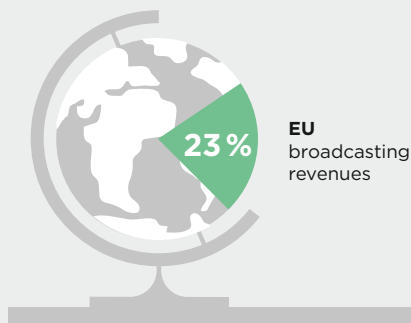
Directive on "Television Without Frontiers": Broadcasters based in the EU which already hold a licence do not require additional licences to retransmit their programmes in other EU member states.

Directive on "Audiovisual Media Services": The amended rules will apply not only to broadcasters in the traditional sense, but **also to video-on-demand** and **video-sharing platforms**.

E CHANGER

For broadcasters, the EU is one of the biggest regional markets in the world.

Broadcasting revenues in the EU amount to £56 billion per year. This is equivalent to 23 percent of the global broadcasting market (£244 billion per year).



The UK is by far the leading country in the EU28 for television channels and on-demand services. The **UK hosts three of the top ten EU28 audio-visual groups** (Sky, BBC, ITV) as well as the European subsidiaries of major US media groups.

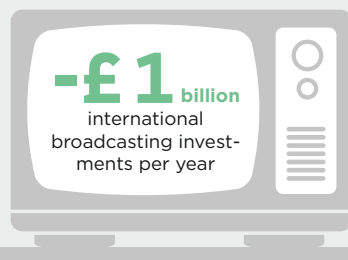
More than 650 international channels – including major US players like Disney, Viacom, or Discovery – **are currently licensed by the UK communications regulator Ofcom** and can therefore be broadcast throughout the European Single Market.

43 %

of the **TV channels** established in the UK target primarily another country.

51 %

of the **on-demand services** established in the UK target primarily another country.



According to the Commercial Broadcasting Association **losing access to EU markets** because of Brexit could cost the UK television market £1 billion per year in investment from international broadcasters.

BROADCASTING IN

Next to the United Kingdom Germany is the largest audio-visual market in the EU28.

Regulation of broadcasting services in Germany

Due to Germany's federal structure, the states ("**Bundesländer**") are responsible for enforcing broadcasting law.

There are 14 regional media authorities ("**Landesmedienanstalten**") which both license and supervise private broadcasters and regulate internet platforms.

In all matters concerning nationwide broadcasting or online content, the authorities decide collectively in **joint committees**.



N GERMANY



Licensing requirements

- Broadcasters who want to distribute their programme in Germany and who do not possess a valid licence from any other EU member state must apply for a licence from one of the regional media authorities
- To obtain a **nationwide broadcasting licence** for Germany, broadcasters are technically free to choose: they may submit their licence application to **any** of the 14 regional media authorities, irrespective of the actual location of their company headquarters
- The **Medienanstalt Berlin-Brandenburg (mabb)** is the regional media authority responsible for the capital city and the surrounding state of Brandenburg. **Unlimited broadcasting licences** can be obtained. (Please see overleaf for details on the mabb-licensing-process)

In general, a licence may only be granted to a person or legal entity

- possessing unlimited legal capacity
- residing in Germany, in another EU member state, or in another state of the European Economic Area (EEA)

HOW TO APPLY



What to consider in the application process:

The German broadcasting regulatory framework is based on the Interstate Agreement on Broadcasting ("Rundfunkstaatsvertrag"), which is based on the EU directive on "Audiovisual Media Services" (AVMS-Directive 2010/13/EU). This directive applies to three groups of cases:

- Location of the company and its administration. The Interstate Agreement is applicable if the broadcasting company is located in Germany
- Use of satellite technology and installations. As an alternative, the regulatory framework can be applicable if the broadcaster is:
 - using a German satellite ground station for the up-link
 - using satellite frequencies that are assigned to the Federal Republic of Germany
- The company is established in another EU member state under articles 49 - 55 of the Treaty on the Functioning of the European Union (TFEU)

What is necessary for an application:

- Information regarding the applicant
- Information regarding the programme
- Financial information
- Statutory requirements
- Application must be submitted in German





FAQ

How long does it take after the application for a licence to be granted?

The process currently takes approximately three to four months from submission to the final decision by the Commission on Licensing and Supervision.

For how long is a licence valid when issued?

In some federal states, there is a time limit of up to ten years, and in others, licences have no time limits.

What are the applicable costs for a licence?

The costs for a permit are between € 5,000 and € 100,000 as a one-time fee for the requested licence duration. The specific amount depends on the duration of the licence, the expected revenue during this time, and market share of the programme.



Do not hesitate to ask us about other relevant topics such as licences, reporting obligations or the regulatory system.

Medienanstalt Berlin Brandenburg
Dr. Marco Holtz
+49 (0)30 264 96 720 | holtz@mabb.de

MEDIA ECOSYSTEM

Why should you choose Berlin-Brandenburg as a future location? **Creative industries in the Berlin-Brandenburg capital region** account for some **37,000 companies**, which employ more than **266,000 workers** and generate an annual turnover of about **€ 23 billion**. The key businesses in Berlin-Brandenburg's media sector are television, news agencies, film, music, games, telecommunications, internet and advertising.

Medienboard Berlin-Brandenburg

is one of Europe's leading funds for series and films and has supported major international TV productions like Homeland and Babylon Berlin. Its annual budget of around € 32 million in funding generates more than € 130 million spending in the region.

Funding for web series, factual and entertainment formats via German Federal Film Fund (DFFF), German Motion Picture Fund (GMPF) is possible.

MediaTech Hub Potsdam

Potsdam has been appointed the only digital hub for media technology in Germany to further strengthen the development of future media technologies.

No. 1 **film** region with major international productions. Most varied **newspaper** region and Germany's strongest publishing location. Germany's **music** capital with an annual turnover of € 700 million. Start-up metropolis for **web** content, games, social media, IT and mobile. 20 of the 30 largest **eBusiness** firms in Germany have headquarters or offices in the region.

Film & TV

Number of companies in this cluster: 4,500
Revenues: € 2,5 billion
Employees: 45,000

Babelsberg – the most modern studio complex in Europe, tradition of over 100 years. Other Studios: Berliner Union Film, Studio Berlin Adlershof, fernsehwerft, YouTube Studios, and the volumetric capture studio – VOLUCAP.

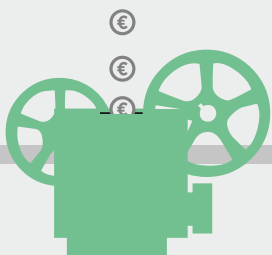
Film and media location with over **300 films** and series and **5,000 shooting days** here every year. **Excellent production conditions** to the highest international standards with highly skilled crews.

Home of **TV stations** such as rbb, Viacom Germany (Nickelodeon, Comedy Central, MTV), Welt and Deutsche Welle TV.

Innovative environment for TV of the **next generation**: dailyme, MagineTV, Vice Media, multi-channel networks like Studio 71, Divimove and the 301+You Tube collective.

Young talents and professionals from universities such as Film University *Konrad Wolf*, German Film and Television Academy Berlin, Berlin University of Arts, Media Innovation Center, Erich Pommer Institute, Entertainment Master Class.

Proximity to **political decision-makers**.



MEDIA ECOSYSTEM

ICT

Number of companies
in this cluster: 9,700
Revenues: € 13.2 billion
Employees: 96,000

As one of Germany's **leading ICT locations**, the region Berlin-Brandenburg is developing into an international hub and focal point with innovative concepts and smart solutions for networked companies and productions.

ICT industry accounts for **8.5 percent of Berlin's GDP**, nearly as much as the entire manufacturing industry (8.7 percent). The close cooperation between science and industry is evident with more than 70 research institutions.

The region offers an outstanding **R&D environment**, a large pool of highly qualified professionals and a spirited cultural landscape. Areas of focus include: software engineering, data management, IT security, the Internet of Things, usability, geo-information and design.



Games

Number of companies
in this cluster: 200
Revenues: € 250 million
Employees: 2,100



The capital region is a **hotspot for international games companies and e-sports**. No other location has such a dense and diverse gaming infrastructure. The Berlin gaming industry has the strongest growth nationwide.

Games companies are innovation drivers in the subjects of **virtual reality, apps and data analytics**. Dense support in the form of consulting, financing and subsidies provides the perfect environment for inward investment, start-ups and innovative projects.

Thus, **Medienboard funds** also all genres of high-quality, entertaining and marketable games.

Top Event location

Berlinale, Deutscher Filmpreis, IFA, NEXT, re:publica, Rose d'Or, Media Convention, First Steps, Prix Europa, MediaTech Con

M



Print & Publishing

Number of companies
in this cluster: 4,800
Employees 38,000

In no other German or European region are so many daily and weekly newspapers published as in Berlin-Brandenburg.

10,000 publications annually and about **300** book and **500** periodical publishers make Berlin the major publishing centre in Germany. Axel Springer AG, a key media corporation in Europe and the largest German newspaper publisher, has its headquarters in Berlin. Springer Nature, Ullstein, Cornelsen, Suhrkamp, Walter de Gruyter, Egmont Ehapa and Hansa Verlag are also based in Berlin.

The diversity of the publishing landscape

in the capital region

- 13 daily newspapers
- 9 weekly newspapers
- 3 Sunday editions
- 15 alternative weekly or local arts and events papers
- 79 advertising journals
- Numerous national general interest and specialty periodicals

Music

Number of companies
in this cluster: 1,400
Revenues: € 2 billion
Employees: 14,000

57 radio and web music providers and 73 national and international television stations guarantee fast, widespread dissemination of creative ideas.

Berlin is a city of music: Nowhere else in Germany is there such a concentration of musicians from all over the world creating, playing and distributing music.

250 event locations (including the Olympic Stadium and Mercedes-Benz-Arena), 2 concert halls and 4 opera houses attract organisers and musicians from all over the world and make the city an influential musical centre in Germany and Europe.



EASY WORKING EASY LIVING

After the fall of the Berlin Wall, the German Capital has undergone a unique and globally acknowledged development. Berlin has grown into a cosmopolitan and dynamic metropolis with a magnetic effect on people and businesses from all over the world.

The relatively **low cost of living** is a major success factor for the **great popularity, quality of life** and attraction of the capital region for creative people, businesspeople, young start-ups, cultural workers, students and many other people.

Despite rising rents, the price-performance ratio in the capital region **remains unbeatable (cheap)** compared to other attractive locations like London or Paris.

Berlin offers a high quality of life but remains affordable.

Cost of living in Berlin is 34 percent cheaper than in London, in €

Beer	2.97	5.94
Meal/Lunch	10	12
Public Transport	80	157
Flat*	649	1,470
Gym membership	29	77
Basic Utilities**	189	161



* 1 bedroom in City Centre; ** Monthly

Sources: Knight Frank; Expatistan; Foreign language study 2013, Berlin Partner with Forsa; IHK Berlin; Berlin Partner



Commuters from ...

... Berlin to Brandenburg
84,335

... Brandenburg to Berlin
202,968

With one of the **biggest transport networks** in Europe, including an extensive system of **trams** and **buses** and good facilities for **cyclists**, the Berlin Brandenburg Metropolitan Transit System beats other cities hands down.

On average, the daily commute in the UK stands at a whopping 1hr 40mins. Berlin, in contrast, a mere 40mins. The **rail transit network** in the metropolitan region comprises a total of 1,900 km – about the distance between Berlin and Moscow.

The People of the Region

The population of Berlin, Germany's largest city, reached 3.6 million at the end of 2017 – 1.1 percent more than in the previous year. Growth drivers continue to be foreigners, moving to Berlin. **There are people of some 190 nationalities living in Berlin.**

Adding the 2.5 million residents living in Brandenburg, the **capital region Berlin-Brandenburg with its more than 6 million residents** is the second largest metropolitan area in Germany.

Linguistic competence

Almost all employed Berliners are able to communicate in at least one foreign language: over 60 percent in two and 23 percent in three or more languages.

English 90 %	French 31 %	Russian 22 %
Spanish 10 %	Italian 5 %	Turkish 5 %

HELLO! Hallo!
Bonjour!

ECONOMY & BUSINESS LOCAT

Berlin was devastated and divided after World War II. Today, it is a **hub for tech innovation** in Europe. In the capital of cool, the start-up scene is heating up.

Berlin-Brandenburg offers excellent conditions for companies. The region is situated in the heart of Europe with an **outstanding infrastructure**, an **international talent pool** and an attractive living environment. Businesses benefit from **comprehensive consulting and funding**. A positive investment climate backed by **strong networks and technology transfers** ensure ideal business opportunities. Moreover, Berlin's **dynamic and creative environment** is catching the eye of investors.

The home of German start-ups

42 %

of jobs in **German start-ups** are located in Berlin.

>40 %

of employees in Berlin's start-ups **are foreign nationals**.

45 %

of all in Germany in the first half of 2018 registered **financing rounds** were invested in Berlin-Brandenburg companies.

17 %

of all **start-ups** from 2017 are based in Berlin.

GDP 2017

change on previous year

Berlin 3.1%

Brandenburg 1.4%

Germany 2.2%

Strong economy

For several years, Berlin's economy has been **one of the best-performing** of all federal states. The German metropolis benefits from its international popularity, the comparatively large work-force and an outstanding research environment.

Powerhouse of science

With the highest density of academics and researchers, altogether around **50,000 people are employed in Berlin's scientific facilities.**

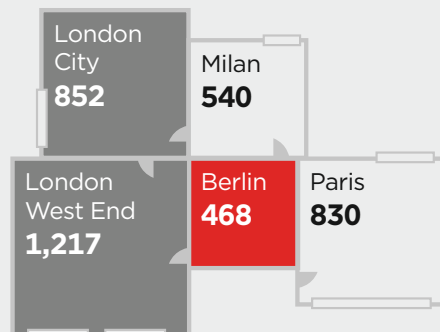
> 230,000 people **study** in Berlin-Brandenburg; on average, **40,000** people **graduate** with degrees annually.

ICT-infrastructure

Extensive **broadband coverage** and fibre optic connections are possible in almost all of the city area. **91 percent** of private households, **97 percent** of business customers are supplied with at least **50 MBit/s.**

Office rents are favourable

Rental prices of prime office properties as of 2nd quarter 2018, in € per sqm per year.



We are happy to support you along the way.



Brandenburg Invest
Fernanda Lange Boettcher
+49 (0)331 730 61 268
fernanda.lange@wfbb.de

Berlin Partner
Birgit Reuter
+49 (0)30 46 302 338
Birgit.Reuter@berlin-partner.de

Medienanstalt Berlin-Brandenburg (mabb)

Kleine Präsidentenstraße 1 | 10178 Berlin

Tel.: +49 30 264 967-0 | mail@mabb.de | www.mabb.de

The mabb is the joint media institution of the states of Berlin and Brandenburg. It is an independent institution under public law and thus a non-governmental institution. It is committed to safeguarding diversity in private broadcasting, promotes projects to impart media competence and supports innovations in the field of audiovisual media in the Berlin-Brandenburg region.

Your contact:

Dr. Marco Holtz | +49 (0)30 264 96 720 | holtz@mabb.de

Medienboard Berlin-Brandenburg GmbH

August-Bebel-Straße 26-53 | 14482 Potsdam-Babelsberg

Tel.: +49 331 743 870 | info@medienboard.de | www.medienboard.de

Medienboard Berlin-Brandenburg is the main institution for the film and media industry in the German capital region. The Film Funding division provides funding for films, high-end drama series and film-related projects, advises filmmakers on financing issues, and supports the development of the film industry. The New Media Funding division represents Berlin-Brandenburg as a key media location in Germany at international markets and festivals, provides market research and analysis and organises networking events. The department funds media-related projects, serial formats as well as the development of content in the games, web, mobile and VR categories.

Your contact:

Dr. Anna Sarah Vielhaber | +49 (0)331 743 87 83 | a.vielhaber@medienboard.de

mabb_

medienboard BerlinBrandenburg

Berlin Partner für Wirtschaft und Technologie GmbH

Fasanenstraße 85 | 10623 Berlin

Tel.: +49 30 46 302-500 | info@berlin-partner.de | www.berlin-partner.de

First choice: Berlin Partner for Business and Technology

Business and technology support for companies, investors and scientific institutions in Berlin – this is the Berlin Partner für Wirtschaft und Technologie GmbH mission. With customized services and an excellent science and research network, our many experts provide an outstanding range of programs to help companies launch, innovate, expand and secure their economic future in Berlin.

Your contact:

Birgit Reuter | +49 (0)30 46 302 338 | Birgit.Reuter@berlin-partner.de

Wirtschaftsförderung Land Brandenburg GmbH (WFBB)

Babelsberger Straße 21 | 14473 Potsdam

Tel.: +49 331 730 610 | info@wfbb.de | www.brandenburg-invest.com

Brandenburg Invest (WFBB), the Brandenburg economic development corporation, is the central point of contact for investors, companies based in the state of Brandenburg and technology-oriented start-ups. WFBB offers a broad array of services for economic development and the promotion of employment: From supporting a company's establishment and its expansion to promoting innovations, internationalization and networking as well as the acquisition and qualification of a skilled workforce.

Your contact:

Fernanda Lange Boettcher | +49 (0)331 730 61 268 | fernanda.lange@wfbb.de

