

The German Broadcast Market Report 2017

June 2017



The German Broadcast Market Report 2017

June 2017

Prepared for **Audiovisual Finland**
by **Creatives Loop International Ltd & Co KG**



TABLE OF CONTENTS

1. INTRODUCTION	4
2. AN OVERVIEW OF THE GERMAN BROADCAST LANDSCAPE	5
Market overview & trends	5
Television	7
<i>German production culture: The dual system</i>	7
<i>Market figures</i>	8
<i>Free-to-air vs Pay TV</i>	12
<i>Online platforms & cross media content</i>	15
<i>Current OTT case studies</i>	18
<i>Emerging strategies</i>	20
<i>German genre trends</i>	21
Video on Demand (VoD)	28
<i>Market figures</i>	28
<i>Impact of the Netflix rollout</i>	31
<i>Most popular digital TV programmes</i>	33
3. CONTENT COMMISSIONING & ACQUISITION STRATEGIES	35
The value chain	35
Content and airing trends	37
Sources of finance/Funding	40
Genre focus: Drama	43
Unique challenges of the German market	46
Merchandising and licence deals	46
<i>Merchandising</i>	46
<i>Licensing</i>	47
4. FINDING GERMAN PRODUCTION PARTNERS: CO-PRODUCTION	49
Co-Production business models	49
<i>Business models</i>	49
Key German broadcast production centres	51
Key industry stakeholders & useful contacts	54
<i>Top 10 producers</i>	54
<i>Sales agents & distributors</i>	54
<i>TV casting agents</i>	54
5. NORDIC CONTENT IN GERMANY	55
Nordic content case studies	55
Examples of Nordic-German co-productions	57
Nordic Content on Netflix	57
Advice for Nordic Content producers	58
APPENDICES	60

INTRODUCTION

The television market in Germany continues to be impacted by the same trends which are upending the broadcast industry worldwide. Video-on-Demand (VoD), from YouTube and TV “catch-up” libraries to subscription platforms like Netflix and Amazon Prime Video, has changed the way consumers access broadcast content – opening new avenues of competition and generating new forms of content altogether. This is not just a story about Netflix, which does not even rank within the top 5 most-accessed VoD platforms in Germany. Rather, it is about how the explosion of consumption outlets for television and video is driving records amounts of content creation and broadcast competition, pushing production values ever higher and resulting in still more competition.

These days everyone wants to produce a high-end drama series, and many new players are getting into the act, leading to opportunities for more and more series content to break through. Moreover, the growing convergence between content producers and consumers, driven primarily but not entirely by YouTube and its cultural impact, is leading to new broadcast formats and to the rise of the high-value digital short both as a compliment to traditional series-length TV and as a standalone model.

New consumption mediums are also driving an unprecedented internationalisation of the broadcast industry, as the competition for high-value series drama – and the ability for viewers to stream that drama on demand – brings international content from all over the world to market. The high critical acclaim and global popularity of the Nordic Noir genre creates rich opportunities for Nordic drama creators in this environment, with traditional broadcast networks, SVoD platforms, and Pay TV channels alike all investing in content from the Nordic region.

This report aims to give an overview of German broadcast industry, from its general structure and traditional players to the current trends both in the market as well as when it comes to key genres. It is an update to a report originally prepared by Creatives Loop International in 2014. The report begins with a general market overview, followed by a detailed section on traditional television and an update on the current status of German VoD. Subsequent chapters examine content commissioning and acquisition strategies, sources of finance/funding, a profile of trends in global drama as they relate to the German market, and a section on co-production. The report concludes with a case study section covering key Nordic shows to recently hit the German market, examples of recent Nordic-German co-productions, and finally a section detailing our advice for Nordic content creators based on the material in the preceding pages. A practical Appendix details key names and contact information for German Broadcasters, Acquisition Teams, Funding Partners, and Producers, and includes a recent drama catalogue from ZDF, the largest broadcast investor in Germany when it comes to overseas content.

Throughout the report, specific emphasis is placed on opportunities for Nordic content producers and drama creators. We hope this update to our report from 2014 will assist readers in again obtaining a useful high-level overview of the German broadcast landscape and its relevance to Finland, driving the creation of new content and value among Finnish audiovisual stakeholders interested in Germany.

1. AN OVERVIEW OF THE GERMAN BROADCAST LANDSCAPE

Market overview & trends

The German TV market remains one of the largest and most diverse markets in the world. It is characterized by a relatively large number of industry players, and by a mixture of public-service and free-to-air commercial broadcasting with Pay TV channels and the emergence over the past 3-5 years of Video on Demand (VoD). Public-service broadcasters operate within a heterogenic federal system.

Television is thriving in Germany. Key growth drivers include: **Advertising Spend, Pay TV, Cross Media Content,** and **Digital Technology.** In the digital category, the impact of subscription Video on Demand (SVoD) services such as Netflix and Amazon Prime on the German TV market cannot be stated strongly enough. This mirrors the worldwide trend toward VoD but is arguably an even more significant development in Germany, where the TV business has historically been somewhat inward-looking and German language-focused. Now, with a flood of high-quality international content available to viewers via Netflix and other on-demand platforms, traditional public and commercial broadcasters are under more pressure than even before to offer similar quality and global variety in their programming.

This is having a range of fundamental impacts on everything from budgets and production values to consumer tastes and preferences, all of which we will explore in additional detail throughout this report. The core takeaway, however, is that the German TV market is becoming more global and open to international collaboration, while absorbing an increasing amount of original language content. It is a good time to be an international content producer entering the German market, where the innovative technology and business models transforming the entire broadcast industry have opened new streams of competition and created new opportunities for foreign partners to work with the leading stakeholders in German television.

This report is an “update” to the original German Broadcast Market Report prepared by Creatives Loop in 2014 for Finnish Film & Audiovisual Export (FAVEX), now Audiovisual Finland (AVF). At the time of the first report, Netflix had recently been introduced in Germany and we were just beginning to consider the disruptive impact of VoD and new business models on the broadcast industry. Since then the landscape has only continued to change.

As such, while this report updates key figures and aims to again give a broad high-level overview of the German television and broadcast market, a major focus will be the continued impact of disruptive forces in the industry, their impact on the traditional players in German TV, and how the industry’s response is changing the market as a whole.

Viewers

Germany remains the largest television market in Europe, with more than 70 million potential viewers over the age of 14. On average, of 40 million households, there are approximately 1.5 TV screens available per household, a number which has remained relatively constant in recent years. The real change, as in other markets, continues to be in

the means of content consumption, with a growing number of viewers consuming TV and video content on smartphones, tablets, and other alternate devices. Although the “traditional” TV set is still the most popular medium for watching TV in Germany, with 40 percent of Germans listing it as their number one device, that gap has closed in recent years. Moreover, a growing percentage of TVs are smart/connected screens, further driving the increase in consumption via Video on Demand (VoD) and other internet platforms.

One in five German households in 2015 reported owning a TV which can connect directly to the internet, a number which does not account for households running Apple TV, Google Chromecast, Amazon’s Fire TV, and other external connections which enable the user to watch television content online. When these services are factored in, the number of German television households with a connectable TV set climbs to 40 percent, representing some 16 million households.

It can be said that the growth in smart/connected TV sets is compounding the general movement toward Video on Demand in Germany. While some 27 percent of persons over the age of 14 in Germany reported consuming VoD content at least once per month in 2015, this number stood at 62 percent for viewers with an internet-enabled TV.

Viewing Behaviour

97% of Germans watch TV at least once a week and at about 200 minutes per day, the average time spent watching TV has remained relatively stable throughout the past ten years. Yet again the real news is not the amount of total TV time but rather the ways in which viewers are consuming that content and what else they are doing at the same time, particularly in the younger demographic. More and more households are “cutting the cord” from cable entirely, for example by owning an Apple TV or Chromecast and watching TV programming and other video content exclusively via YouTube, Netflix, and other apps. 22.5 percent of VoD viewers in Germany report accessing professional video content via platforms such as YouTube and MyVideo; according to *die medienanstalten* (the Media Institutions), a national industry think tank based in Berlin, this actually exceeds the number of viewers (18%) accessing the on-demand libraries (“Mediatheken”) of traditional broadcasters.

The changing cross-media user behaviour and the interactivity of smartphones and tablets continues to be another of the most important developments. More than half of German TV viewers report using a so-called “second screen” (e.g. laptop, smartphone, or tablet) while watching television – the most common second screen, unsurprisingly, is the smartphone, followed by laptops and tablets. Interestingly, the same percentage of users (roughly one-third) pay more attention to their second screen while watching TV as those who pay more attention to the actual programme they are watching. One note of caution for producers of integrated cross-media content is that just 12 percent of second-screen users report using their second screen to access information related to the programme they are watching – instead the most common use of second screens while watching TV continues to be for news, social media, and shopping.

Online and on-demand viewing behaviour in the German market

- Subscriber Video on Demand (SVoD) continues to grow rapidly in Germany with 43% of internet users now paying for SVoD services (2016).
 - The number of paid VoD subscribers in Germany doubled between 2014 and 2016, from 12 million to some 24 million.
 - While Pay TV is growing, SVoD outpaces it in popularity despite being around for a much shorter length of time. Numbers for Pay TV and VoD are increasingly being reported together, **reflecting a convergence between the two strategies.**
 - Despite the rise of streaming and VoD, just 75 percent of the German population over age 14 reported using the internet on at least a monthly basis in 2015, suggesting that the trend toward online viewing is primarily within younger demographics. **These younger audiences pack a punch – both as SVoD subscribers and as creators of their own independent material.** Free-to-use VoD services like YouTube continue to beat the SVoD platforms in terms of their contribution to total VoD revenue in Germany.
-

Television

German Production Culture: The Dual System

Germany has a dual broadcasting system, in which public-service broadcasting and commercial broadcasting co-exist alongside each other. Public-service broadcasting is mainly financed through Television Licence fees and to a lesser extent through advertising income. The two main public broadcasting corporations are:

-
- ARD (Das Erste): incorporates a nationwide channel and 7 Regional Channels (Die Dritten) alongside 17 Digital Channels. Runs 3sat and ARTE as collaborations with the Swiss, Austrian and French broadcasting corporations.
 - ZDF (Das Zweite): includes 7 Digital Channels. The documentary channel PHOENIX, the children's channel KiKA, and the new online channel Funk, aimed at the 14 to 29 year-old demographic, are jointly run by ARD and ZDF.
-

ARD and ZDF together receive more than 95 percent of funding from Germany's system of public broadcast licensing fees, and have a combined public budget of approximately €8 billion. With more than 20,000 employees and a total budget of €6.9 billion (including revenue derived from advertising and other additional sources), ARD is the largest public broadcaster in the world. Special advertising regulations apply to ARD and ZDF as public broadcasters, with commercials restricted to 20 minutes daily from Monday to Saturday and not permitted on Sundays, holidays, or after 8pm on any day.

In contrast to the public broadcast corporations, Germany's commercial broadcasters generate revenues from advertising income and paid content. There are currently more than 400 commercial channels (including 105 Pay TV channels) in Germany generating a total

turnover of approximately €9.4 billion (2017). Commercial broadcasters are increasingly incorporating VoD and subscription-based services into their business models, for example the SVoD platform Maxdome, which is owned by ProSiebenSat1. Many of the commercial broadcasters also increasingly have their own extra Pay TV offerings, and are taking steps to make their content available via OTT apps and video streaming platforms.

-
- Of the commercial broadcasting channels **RTL has the highest market share with Sat1 and ProSieben following closely behind.**
-

Public service and commercial broadcasters have a mutual interdependence which is reflected in the frequent exchange of presenters, formats and thematic strands between channels. Because of their reliance on tax money and the subsequent need for detailed reporting, the public-service broadcasters are traditionally regarded as “slow adopters” compared to the more flexible commercial corporations when it comes to implementing new formats and programming.

Nevertheless, the public broadcasters have been able to secure big names and sporting events while building on existing formats (such as the Sunday night flagship crime series “Tatort”) to protect their market share and reputation. ZDF and ARD remain the two most-watched channels in Germany, while the regional and national public broadcast channels generally account for 44 percent of German television ratings.

Additionally, and more relevant to the emerging television landscape, Germany’s public broadcasters have been active when it comes to incorporating non-linear/on-demand programming and pursuing new broadcast formats.

Key developments:

- In late 2016 ARD and ZDF launched the online-only channel **Funk**, with a budget of €45 million. The streaming service is aimed at the 14 to 29 year-old demographic and was initially controversial as it was widely believed that the two public broadcasting giants would have difficulty implementing an experimental format outside their core business offering. Thus far however the channel has had success distributing popular international TV content, including hit shows *Fargo* and *Orange is the New Black* from the United States as well as *Dr Who* and *The Aliens* from the UK.

Market figures

Main TV channels by viewing time

The public-service broadcaster ZDF has again secured the highest market share by viewing duration in 2016, only slightly ahead of ARD. However when one includes ARD’s seven regional channels (Die Dritten), then the combined ARD viewership nearly doubles that of ZDF (see Table 1 below).

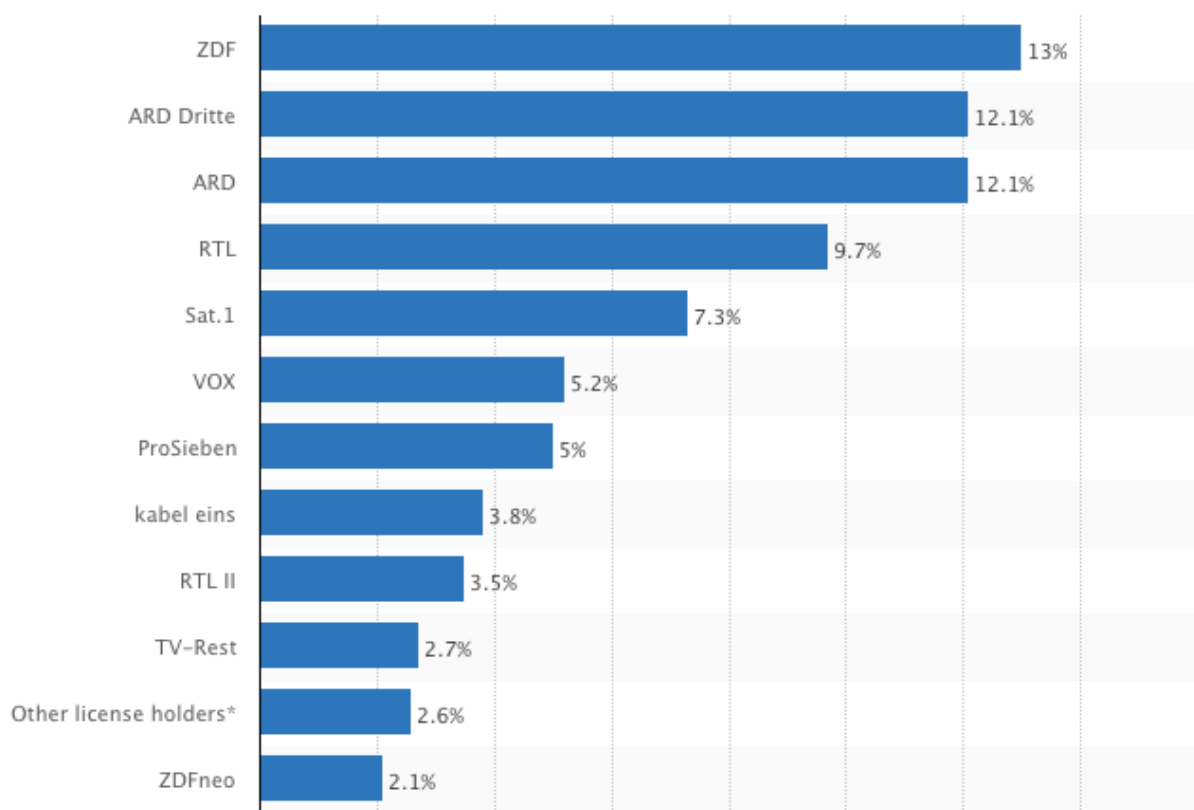
ZDF and ARD are perceived to design programmes targeted at a 50+ audience, however this is now changing with the channels now attempting to reach a younger audience via new

platforms like Funk as well as the children’s channel KiKA. Traditionally, the commercial broadcasters position themselves to reach out to younger target groups. Their main target continues to be the so called **“advertising-relevant core group of 14 - 49 year olds”**.

-
- The arrival of new niche channels such as SAT1 Gold, Sixx or RTL Nitro has caused real movement in market share in the last couple of years while viewer loyalty on a channel-to-channel basis has significantly decreased.
-

Also notable is the impact of seven regional broadcast channels throughout Germany’s federal states. The country’s size and historic background is reflected in the **viewers’ sustained interest in regional news and events**.

Table 1: Top channels in Germany by market share, 2016



Source: Statista

Full statistic: <https://www.statista.com/statistics/380528/tv-channels-audience-market-share-germany/> (2016)

Overview of free-to-air TV Broadcasters in Germany

Broad-caster	Market Position	Profile (Genre, size, relation to each other)
ARD	2	The oldest and the most-established of the German channels (comparable to the “auntie BBC”). Focus on qualitative and high-end programmes, in particular drama, information, documentaries, series. Home to the “Tagesschau” (daily evening news) and Tatort (Sunday crime series) which repeatedly draw in big audiences. Positions itself as fully-fledged PSB and deliberately remains aloof over commercial channels.
ZDF	1	Although ZDF’s ratings are higher than ARD’s it will always be “Das Zweite”, the second PSB in Germany. Focus on high-end drama, high-quality news programmes and pre-prime time series. Renowned for its older audiences. Also deliberately stands apart from commercial programmes.
RTL	3	The most successful among the commercial broadcasters. Very popular with 16-30 year olds. Focus on entertainment, usually delivering what the audiences require rather than focussing on a high-end or intellectual approach. The big international shows (“Who wants to be a millionaire”, “I’m a celebrity...” etc) usually run on RTL.
Sat1	4	Focus on international series, game shows and entertainment formats. Regarded as only second to RTL by audience ratings and general perception. Has a kind of non-descript aura instead of a firm channel vision. Currently there are no self-produced series in planning although SAT1 was quite successful in recent years with series like “Der letzte Bulle” or “Danni Lowinski”.
ProSieben	5	Delivers a broad mixture of entertainment shows, blockbuster films, education formats and successful international series. The battle between ProSieben/SAT1 and the RTL group is an ongoing one, usually both sides have their peaks with certain programmes.
VOX	6	VOX brings a broad mix of bought and self-produced programmes to the table. Focusing on entertainment formats, factual, series, documentaries and drama, VOX manages to combine the odd high-end programme with the usual “middle-of-the road” offering.
RTL II	7	Regarded as “trashy” TV. Focuses on “shock” entertainment formats and cheaply-produced films and series.
kabel eins	8	Regarded as a series and film channel, specialising in older programmes and re-runs.
arte	-	High-end and intellect-stimulating TV, lauded as one of the best TV channels in Germany. Drama, documentaries, innovative new formats. arte is happy to experiment and not afraid of the proclaimed demise of linear television.
3sat	-	3sat is a little more conventional than arte but also runs high-end dramas and documentaries. Positions itself as a “culture” channel and adopts programmed accordingly.

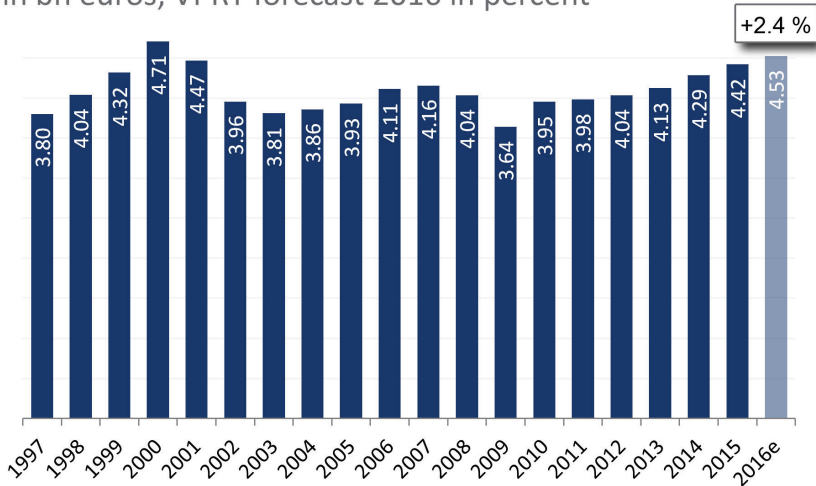
Advertising spend

The German TV advertising market continues to see steady growth. From a low point of €3.64 billion in 2009, revenues from television advertising expanded by nearly 20 percent to €4.42 billion in 2015, and were projected in October 2016 by the Association for Private Broadcasting and Telemedia (VPRT) to hit a 15-year high for the year.

Table 2: Net television advertising revenue in Germany, 1997-2016

Net advertising revenue generated by television in Germany

in bn euros, VPRT forecast 2016 in percent



Source: VPRT/ZAW Statistics 1997-2015, VPRT Market Forecast 2016
Status: October 2016

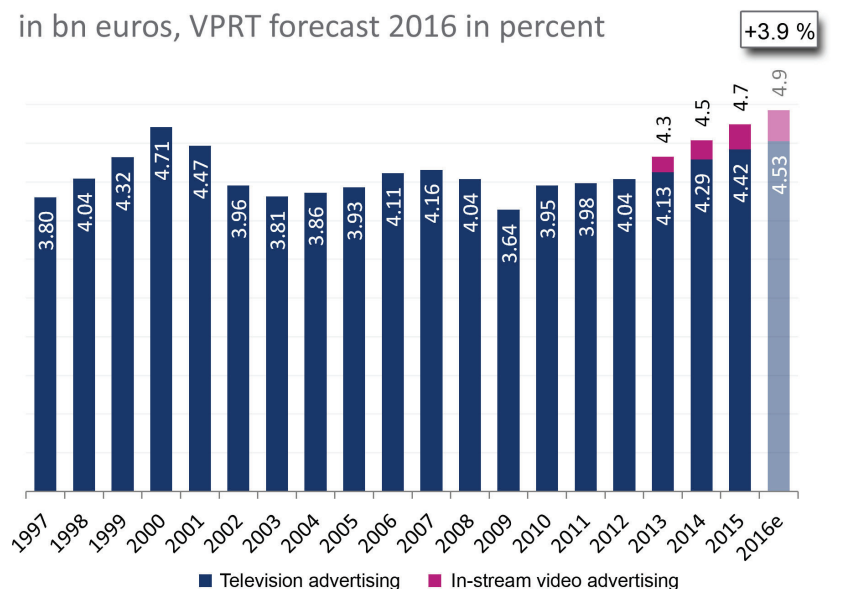


While the market for traditional TV advertising continues to expand, it is being increasingly supplemented by growing revenues from in-stream video advertising, which were projected to grow by nearly a quarter to €400 million in 2016, accounting for almost 10 percent of total industry advertising revenue.

Table 3: Net television advertising revenue in Germany (including in-stream video)

Net advertising revenue generated by television and in-stream video in Germany

in bn euros, VPRT forecast 2016 in percent



Source: VPRT/ZAW Statistics 1997-2015, VPRT Advertising Forecast 2016
Status: October 2016

In addition, combined non-advertising revenue from paid TV and video content stood at €2.6 billion in 2015 and was projected by VPRT to reach nearly €3 billion in 2016, underscoring the growing importance of subscription services and VoD to the industry's bottom line.

Free-to-air vs Pay TV

Germany's free to air commercial TV landscape boasts more than 400 channels.

Most broadcasters focus on digital strategies alongside their traditional business models but niche channels such as SAT1 Gold, Sixx or RTL Nitro have also been established by the commercial broadcasters in order to cater to highly specific viewer preferences, with the intention of connecting consumer interests with advertising opportunities across the entire content offering.

Alongside VoD, Pay TV has established itself as the next fastest growing area in the German broadcasting arena. 7.4 million German viewers held a subscription to one of the 105 Pay TV channels in 2016, an increase of nearly 20 percent since 2013. In addition to the number of subscribers, the number of Pay TV channels has also grown from 75 to 105 since our first report in 2014.

Given that Pay TV in Germany lagged for years behind its counterparts in other developed countries, the current expansion of this offering is notable, and points toward the general role that streaming and non-linear consumption are playing in changing the way that people access video and television programming.

The numbers above refer specifically to Pay TV channel subscriptions, as opposed to general VoD platform subscriptions (e.g. to Netflix), which at 24 million are nearly three times the amount of subscriptions to an individual Pay TV channels, according to industry watcher Broadband TV News. Nonetheless, figures for these two segments are increasingly being reported together, highlighting the growing convergence between the two strategies.

Whereas traditional Pay TV used to revolve around selling customers an additional subscription to scheduled content that was not available via their “typical” broadcast package, today Pay TV is attempting to leverage VoD and original production to capitalize on the same trends that are upending the broadcast industry throughout the world. In order to make Pay TV more appealing, broadcasters in Germany are a) curating more international content; while b) producing more and higher-quality original content, engaging in the same “quality offensive” seen throughout the international television landscape. These trends are reflected in the quoted remarks below, including those from the CEO of Sky Deutschland, Germany’s leading Pay TV provider:

Carsten Schmidt, Chief Executive Officer, Sky Deutschland:

“An increasing number of viewers are prepared to pay for the quality programmes offered by pay-TV channels. Sky will continue to encourage this trend by consistently enhancing our offering, by investing in original series productions, technological innovations, and in expansion of our channel portfolio.”

Hannes Heyelmann, Chairman of the Pay TV working group at VPRT, focuses on the opportunity for international co-production as a Pay TV growth strategy:

Hannes Heyelmann, Senior Vice President & Managing Director Central and Eastern Europe and International Programming Strategy, Turner

“Exclusive content and control of programme rights are an important key to success. For this reason, we will continue to invest strongly in the production of in-house content. This applies both to projects at a local level, such as the six-part mini-series “4 Blocks” currently being filmed in Berlin, and to projects realised with Turner US at an international level.”

Katharina Behrends, meanwhile, points toward the role of targeted programming and curated content in boosting the Pay TV value proposition in Germany:

Katharina Behrends, Managing Director German-Speaking Territories, NBCUniversal International Networks

“(Pay-TV)’s drivers are very precisely positioned genre channels, each offering exclusive and innovative content of high quality - both linear and non-linear. In this context, these genre experts take on a “curatorial function” for viewers, the importance of which is increasing amid the diversity of media offerings.”

Taken together, from a production perspective it seems clear that the opportunity in Pay TV is to capitalize on the pressure traditional broadcasters are feeling to keep up with the growing popularity of the leading SVoD platforms (Amazon, Netflix, etc). Pay TV is a growing segment that is being driven largely by the same trends as the broadcast market generally:

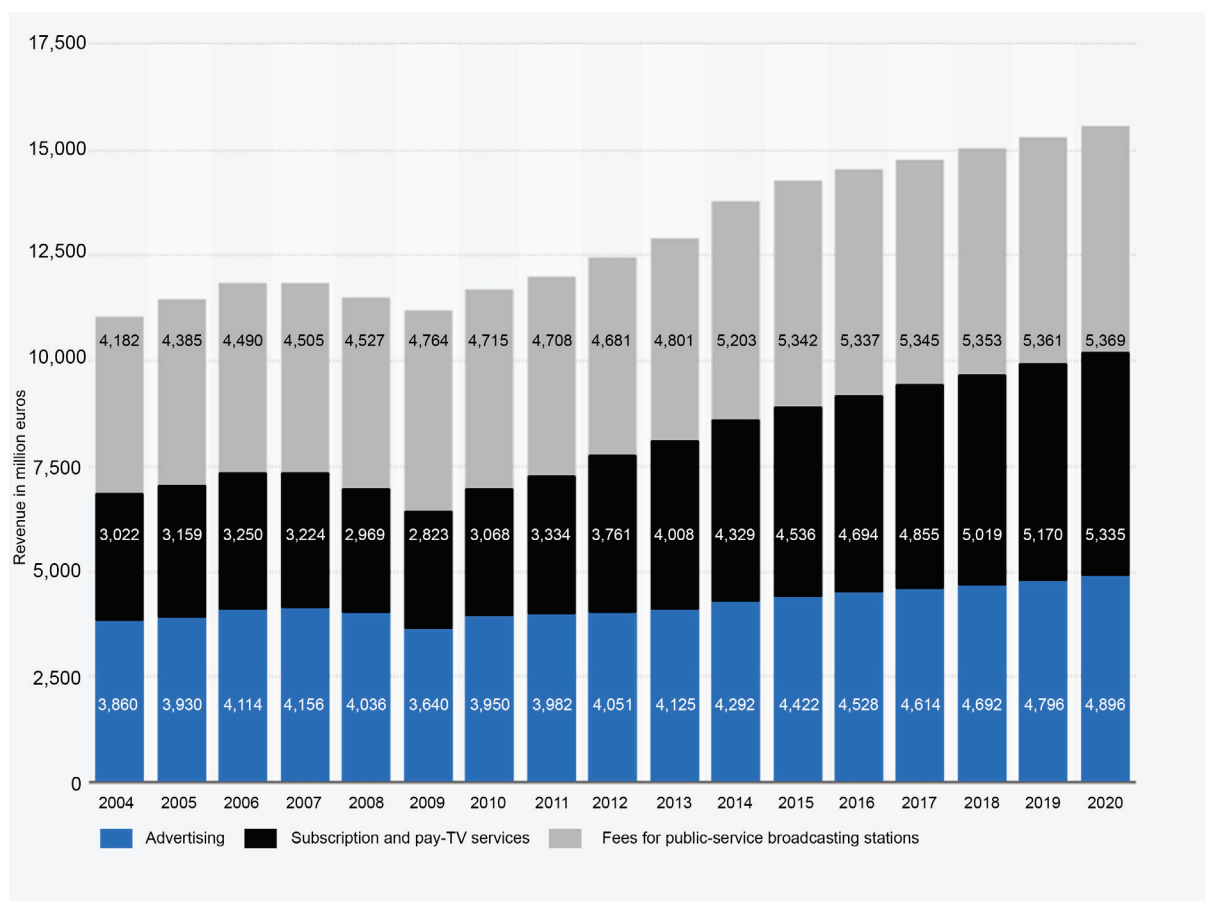
namely, original production, internationalization, and expanded content offerings and availability via on-demand streaming.

With more new players producing high-quality programming, while making it more widely available than ever before, the bar is raised for Pay TV channels to continue investing in new shows and quality. There is clearly a role here for international entrants with compelling content that meets the needs and interests of the market.

TV turnover to 2020

The expansion of Pay TV is reflected in the chart below from Pricewaterhouse Coopers, which illustrates the growing importance of Pay TV and VoD as a percentage of total television turnover in Germany. While advertising revenue is projected to grow modestly to 2020, subscription and Pay TV services are expected to drive most of the overall expansion within the industry.

Table 4: Development of TV turnover in Germany 2004-2020 (proj)



Source: PwC, 2017

TV platform providers & mobile distribution

The German market is a competitive one when it comes to providing TV platforms. Key stakeholders are Kabel Deutschland/Vodafone, Kabel BW, HD+ and Deutsche Telekom's IPTV service **Entertain**. Online TV services and apps such as Zattoo, Magine, and Glotzdirekt are competing for subscribers while Pay TV channels are also creating their own "on-the-go" options for mobile devices. ARD and ZDF's new Funk channel, introduced above, is an emerging stakeholder in mobile particularly as it targets a younger audience.

The two public channels now also offer a free online-streaming service for their content. The commercial broadcasters, for the most part, have not yet embraced this model as a general offering – their platforms are only available for existing cable subscribers.

Appendix:

[Listing of ARD and ZDF channels & commissioning contacts](#)

[Listing of commercial TV channels & commissioning contacts](#)

[Listing of Pay TV channels & commissioning contacts](#)

Online platforms & cross media content

Online platforms for consuming TV and film content have only continued to gain steam since 2014. A recent study showed by the industry association BITKOM showed that one-in-three video streaming users in Germany had replaced conventional television either completely or at least partially via streaming options. Almost half of all streaming users (44%) reported watching less TV via cable or satellite since they started consuming video content through the internet. Meanwhile nearly one-in-five streaming users (18%) would be prepared to abandon conventional television completely in the future.

In-stream and in-page advertising has historically been the preferred business model for free-of-charge platforms, as evidenced by the growing contribution of streaming revenue to industry advertising turnover as a whole. Increasingly however even the most stalwart free-of-charge platforms are looking at new business models, with YouTube's **YouTube Red** subscriber service having launched in Germany in late 2016.

YouTube in the German market: Growth and possible next steps

YouTube continues to be the most popular video platform in Germany, although Facebook is becoming increasingly relevant, particularly when live streaming is also included in the equation. There are many new entrants to the top 10 most popular German YouTube channels, however most notable is the overall jump in subscribers. Gronkh was the most popular YouTube channel in Germany in 2014 with 3 million subscribers, whereas today the entire top 10 list each can claim more than that number. Channels which have entered the top 10 since 2014 are in **bold**.

- **Freekickerz (Sports, 5.4 million subscribers)**
 - Gronkh (Games and Gaming, 4.5 million subscribers)
 - **BibisBeautyPalace, Lifestyle and Vlogs, 4.4 million subscribers)**
-

-
- Kontor.TV (Music label/electronic & dance music, 4.1 million subscribers)
 - Kurz Gesagt (“In a Nutshell,” Learning and Education, 4.1 million subscribers)
 - Julien Bam (Personal brand, 3.8 million subscribers)
 - Ape Crime (Entertainment, 3.4 million subscribers)
 - Dagi Bee (Personal brand, 3.4 million subscribers)
 - Majestic Casual (Musician, 3.4 million subscribers)
 - Simon Desue (Personal brand, 3.2 million subscribers)

When it comes to genre YouTube continues to attract most users with comedy, games, music, and beauty & fashion/lifestyle content.

One trend to watch going forward will be the emergence of YouTube Red and whether it becomes another centre of original content production in Germany – or if it even considers a strategic partnership with any of the leading commercial broadcasters. As of February 2017 YouTube had reportedly been in talks with the Walt Disney Company to stream a bundle of channels from Disney networks in the United States including ABC (a major American network) and ESPN (America’s leading sports channel). Certainly any similar developments in Germany would be significant for the market.

Meanwhile, YouTube is also beginning to invest in original content, with Google (YouTube’s parent) claiming to stockholders on an earnings call in January 2017 that it has produced some 27 original series to date.

Again this illustrates the importance of original content for remaining competitive as a streaming provider and could ultimately result in the emergence of another major player in the production landscape over the coming years. For now the model behind “YouTube Red Originals” appears to be to leverage the popularity of current YouTube stars toward the creation of paid subscriber content, which is then produced into a series or mini-series by YouTube/Google.

Impact of Apple TV et al

So far the major impact of Apple TV and its counterparts (Amazon Fire TV, Google Chromecast, etc) in the market has been as additional conduits for the growth of streaming and VoD/SVoD. Such “set-top” devices make it easier for individuals to forgo the need for a cable connection by accessing a mixture of free and paid content entirely via YouTube, Netflix, and other apps or by direct streaming from another device. As noted earlier, some 16 million German households (40%) today own either a TV with built-in internet connectivity or a connectable device such as Apple TV/Google Chromecast which enables live and/or on-demand streaming.

Interestingly, traditional broadcasters are starting to respond by attempting to leverage TV streaming apps for their own ends. In late 2015 ZDF launched an app making its content library (Mediathek) available for Apple TV users. On the commercial front, RTL (TV Now) and ProSiebenSat.1 (7TV) have also followed suit with their own apps. In an indication of the company’s bid to hold on to viewers in a changing TV landscape, RTL’s TV Now app is available on a 30-day free trial basis even for non-existing cable subscribers. Zattoo, one of

the leading online TV channels in Germany (though based in Switzerland), also released a live streaming app for Apple TV in 2015.

Again the main story is the response of the market to the increasing availability of alternatives to traditional television. The legacy broadcasters are being forced to adapt their offerings for the digital age, which is further driving the shift toward new business models and new consumption mediums. More importantly, it is also driving the creation of new content for those mediums.

“Mediatheken” (Broadcasters’ own internet content platforms)

- The popularity of the public and commercial broadcasters’ online content libraries (Mediatheken) continues to rise, with 22 percent of cable customers now turning to the libraries more than once per week.
- According to recent numbers from BITKOM, 77 percent of German internet users stream video content online. From this group, the largest share (60%) use the Mediatheken, ahead of YouTube (56%) and live streaming (39%).

Conventional TV vs Streaming

A mixed picture emerges when trying to examine the amount of time German TV watchers are spending with conventional TV versus VoD/SVoD. Overwhelmingly, a TV set is still the preferred medium for consuming moving image content, with 62 percent of Germans rating it as their most important device for this purpose, far ahead of laptops (11%), smartphones (5%), and tablets (3%).

The ARD and ZDF 2016 Online Study, meanwhile, finds that German adults still overwhelmingly prefer traditional TV to watching via the internet – however these numbers only compare traditional TV to online live streaming channels and do not account for the broadcaster Mediatheken, SVoD, or Smart TV apps/connected TV streaming devices (such as the Apple TV, Chromecast, etc).

Overall, the numbers would seem to show that Germans still prefer to watch TV on a traditional television set, but that the mode of content access is changing. Perhaps the best indication of Germany’s evolving TV habits comes from a November 2016 BITKOM report, in which nearly three-fourths (72%) of streaming users in Germany said that they no longer feel pressured to turn on the TV to watch certain programmes at certain times, up from 59 percent in 2014. Meanwhile, more than half (51%) say they watch less classic TV because they are spending more time streaming. 35 percent report using Video-on-Demand as a replacement for linear television altogether.

Use of second screens

As noted, parallel use of television and online offerings is also continuing to gain popularity with German audiences. While watching television, nearly 57% of viewers report using a second screen. Significant events like the “Eurovision Song Contest” and the FIFA World Cup are perfect outlets for parallel use of linear and online.

In recent years broadcasters have attempted to take advantage of the rise in second-screen use to create cross-media content which encourages viewers to interact with the television

programme they are watching, using their second device. So far however this has not been a success, perhaps due to the fact that less than 12 percent of second screen users report accessing content related to the programme they watching, according to *die medienanstalten*.

OTT and cross-media content in the German market

Cross-media content has so far seen uneven results in the German market. The most notable early success story was probably “Dina Foxx” (ZDF), an interactive television & online crime series where viewers could help the main character to solve crimes and even choose the direction of the story themselves. The show won multiple awards and had just been re-commissioned for a second season at the time of our first report, however it was ultimately discontinued due to underwhelming ratings. One of the challenges for cross-media content has been the fact that, as noted above, viewers tend to use second screens for activities unrelated to what they are watching on TV.

Several recent examples of new OTT content demonstrate more of an emphasis on offerings which aim to leverage alternate platforms (e.g. “trans”-media) without expecting viewers to interact with multiple content mediums simultaneously.

The limits of cross-media: The story of JoizTV (update)

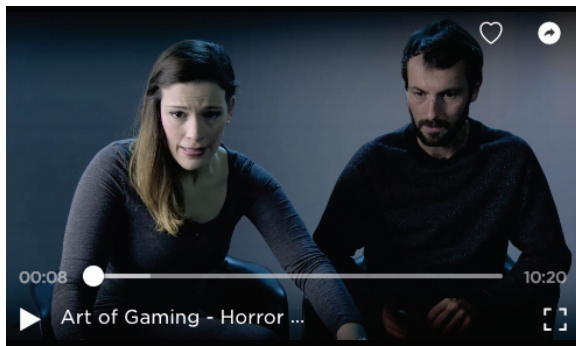
Joiz launched in 2011 as a full-time, free-to-air TV and online broadcaster based in Switzerland and Germany with a multiscreen focus and a wide range of video content targeting 14-29 year olds. Combining traditional TV with online content and social media platforms, Joiz was intended to be all about viewer/user engagement, interaction, data and activity beyond just watching television. This new approach co-existed alongside the regular broadcasters and was pitched as having the potential to become the preferred means of content consumption amongst the youth target group.

Unfortunately, after launching in Germany in 2013, Joiz ran into financial difficulties due to high distribution costs and low advertising income. To cut costs, Joiz Germany terminated its DTH satellite distribution and converted itself to online-only.

As of summer 2016 joiz Switzerland shut its doors due to ongoing over-indebtedness and the failure to accomplish a new financing round. For the time being, although Joiz will continue in Germany under new ownership, it stands as a cautionary tale which calls into question the genuine reach and viability of cross-media TV programming in the German market.

Current OTT case studies

- “Art of Gaming” (ARTE Creative, 2017) is based on the “Let’s Play” video format, which is very popular on YouTube and Twitch, involving the demonstration and commenting on the playing of computer games.



Art of Gaming (ARTE Creative), <http://www.ufa-lab.com/the-art-of-gaming>

In each episode, professional gamer Melek Balgün invites artists, scientists and enthusiastic gamers to play and discuss computer games with him.

- "Tahrib – The Never-Ending Journey" (Bayerischer Rundfunk, 2016) is a transmedial documentary project that aims to extend viewers' understanding of flight, migration and integration issues. The programme combines TV film and online offerings to tell a comprehensive story of the refugee situation in Europe.



Tahrib (Bayerischer Rundfunk, https://www.youtube.com/watch?v=l--Vad_Q1J0)

- "Der Wedding kommt" (funk, 2016) "Der Wedding kommt" is a Facebook-first web series about the lives of three young Berlin women in their late 20s. The series mostly takes place in the Berlin U-Bahn U8, which the three girlfriends regularly ride en route to the Neukölln nightlife. The show's format consists of a series of shorts with each "episode" occurring in under 5 minutes.



Der Wedding kommt (funk, https://www.facebook.com/pg/weddingkommt/videos/?ref=page_internal)

Emerging strategies: ARD and ZDF start new online channel focused on ages 14-29

As noted previously, in 2016 ARD and ZDF launched funk, their much anticipated online-only channel targeted toward the under-30 demographic. “Der Wedding kommt” (above) is being produced as a Facebook series for funk and is indicative of one of the formats that the new channel is experimenting with. It is too early to tell how this experiment will fare, but for now the important takeaways from a production perspective are a) that the model is being supported by Germany’s top broadcasters as a new content strategy; and b) that the channel thus far has also been a platform for highly-rated international content appealing to its target demographic. Presumably funk’s content team would be all-ears to the possibility of Nordic material geared toward this same audience.

Emerging strategies: Leveraging distributed content

One of the major enduring consequences of YouTube and the move toward OTT platforms and content has been the blurring of the lines between content consumers and creators. As user-generated videos draw more and more eyeballs, the larger broadcast players around the world are getting in on the act. Studio71, a multi-channel network with offices in New York City, Toronto, London, Vienna, Paris, and Berlin, represents over 1,200 different online (e.g. YouTube) channels receiving a combined six billion views each month. The network is 70 percent owned by ProSiebenSat.1 and works to help monetize grassroots online content through licensing and advertising, among other activities.

BroadbandTV (BBTV), another digital studio which is partly owned by RTL Group, is in the same space, “offering its digital creativity expertise to brand-owners seeking quality video entertainment aimed at their customers.”

While we may be in a “golden age of television” as it relates to traditional, serialised content, it is also true that the vast majority of videos produced and consumed on the internet are a) short-form; and b) made by regular people. Many of the traditional broadcast networks have recognised a huge opportunity in the amount of video activity that is taking place outside of the traditional broadcast orbit. Commercial broadcasters like ProSiebenSat.1 and RTL Group in Germany are acting accordingly to develop business models which can help them to absorb and capitalise on this content, both as standalone videos and as supplements to longer-form programming. YouTube’s model of building on the mass reach and popularity of certain users on its platform by making paid spinoff web programming will likely permeate to other broadcasters, who can use a similar tactic to promote their own offerings.

Emerging strategies: Facebook and Instagram getting into original production?

In December 2016 Facebook put out the word that it is considering a move to begin producing and buying its own original video content from creative producers, as a means of expanding its presence in video. CEO Mark Zuckerberg has stated openly that he wants Facebook to be a “video first” company, and the company is now reportedly looking at buying its own content, both outright and via licensing, sparking a round of speculation that the company intends to use its vast user base and existing content presence in order to

develop a Netflix-style VoD platform intended to generate new streams of revenue as well as a larger video audience and more video activity from users.

Facebook is currently hiring for a producer and software engineer focused on original film, while Instagram (which is owned by Facebook) is hiring for creative producers. With 2 billion active users around the world, any entry by Facebook into original content production or co-production would be a major shakeup in the industry. According to a report from Business Insider, Facebook could release its first slate of programming by as early as mid-June 2017, and will combine TV-length big budget shows with quick-hit content as short as five or ten minutes and refreshing every 24 hours.

Business Insider, 6 May 2017

“Facebook sees high-quality, scripted video as an important feature to retain users, particularly the young demographic that is increasingly flocking to rival Snapchat, as well as a means to rake in brand advertising dollars traditionally reserved for traditional television.”

This development is brand new and its implications (as well as Facebook’s ultimate ambitions) are still being hotly debated. Certainly it will remain a topic to watch as a successful initial rollout could spread very quickly to begin including a diverse range of international content targeted toward multiple key markets. Germany is Facebook’s largest individual European market, with approximately 38 million users.

German Genre trends

Drama Series

Germany is seeing the same clear trend in terms of high-value drama that is going on throughout the rest of the world. **This trend is being compounded by the increasing ability for hit content to simultaneously permeate multiple markets around the globe.** What is most interesting however is the response of the market in terms of a) leveraging the ability for TV shows to reach a wider audience (and thus justify the higher budget required to compete in today’s crowded TV landscape); and b) new models of funding and partnership that have arisen to meet the current demand.

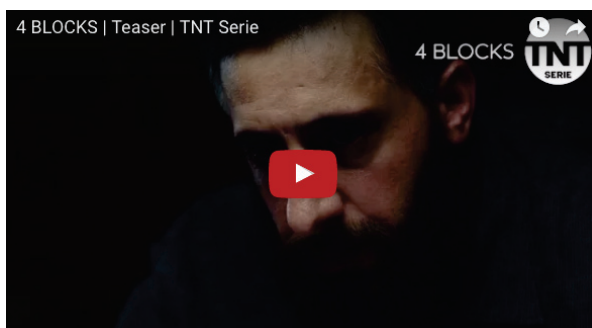
“Deutschland 83,” the hit cold war spy thriller set in 1980s Berlin which premiered at Berlinale in 2015, won a Peabody and an Emmy after becoming the most popular foreign-language drama in the history of British television following a run in the UK. In the United States, the show was the first German-language TV series to air on an American network. The show aired on RTL in Germany and despite losing German viewers over the course of its first season, was recommissioned in October 2016 with the second season (“Deutschland 86”) set to premiere in 2018. Not insignificant is the fact that Deutschland 83’s international popularity may have played as much of a role in getting it renewed as its success at home: 1.72 million people watched the finale of Deutschland 83 in Germany (half as many as tuned in for the premiere), whereas the show as of January 2016 had attracted 2.5 million viewers in the UK.

Meanwhile “Babylon Berlin,” which will debut on Sky Deutschland’s Pay TV channel in October 2017, can already lay claim to being the most expensive non-English language TV series ever made. With a budget of USD\$45 million, the crime drama series set in 1920s Berlin is a co-production between Sky, Germany’s largest Pay TV provider, and ARD, the largest public broadcaster. The innovative partnership has been cited as a response to the need for European broadcasters to muster the resources needed to produce content that attracts viewers increasingly accustomed to feature-film quality television, with the *Hollywood Reporter* going so far as to say it could “change how Europe makes TV.” Sky and ARD for their part have worked out a mutually beneficial airing agreement for Babylon Berlin where Sky will debut the first season exclusively on its pay TV platform, with ARD waiting a full year to launch the series on free TV.

International drama series in the German market

In recent years there have been many international success stories within German drama. “Thicker than Water,” produced by Sweden’s Nice Drama, was picked up by ZDF in 2014 and renewed for a second season. Also picked up by ZDF was the UK serial killer drama “The Fall.” Some other recent drama series from around Europe currently airing or set to air in Germany include “Maltese” (Italy, Palomar), a drama about one man’s battle against the Mafia in 1970s Sicily, “Before We Die” (Sweden, B-Reel Films), a suspense-driven detective series shot on location in Stockholm, “Anomolia,” (Switzerland, Point Prod and RTS), a French-language fantasy series set in Switzerland, and “Tabula Rasa” (Belgium, VRT/een, co-pro with ZDF), where a young woman with amnesia becomes a key figure in a disappearance case.

Another interesting strategy to emerge is that of international broadcasters introducing localised content to the German market via pay TV. The best current example of this is American-based Turner Network Television (TNT), which in May 2017 debuted “4 Blocks,” a 6-part drama mini-series set in Berlin’s Neukölln neighbourhood about a young man who struggles to escape the pull of gangster life in his community. The series airs in Germany on the pay TV channel TNT Serie.



4 Blocks (TNT, <http://www.tnt-tv.de/tnt-serie/serien/4-blocks>)

A few other notable German drama stalwarts, all running since at least 2010, include the likes of “Im Angesicht des Verbrechens” (In the Face of Crime), an action show about the

Russian mafia in Berlin, “Alarm für Cobra,” a longstanding crime and action series about traffic police on the German Autobahn, and “Weissensee,” which follows two families in East Germany during the 1980s. It should be noted, however, that the above shows fall very much within the mainstream television category and are not necessarily examples of any emerging trends in the market.

∞ Crime series

German audiences love crime series and for this reason the influx of Scandinavian crime shows over the past several years has been met with success in the German market. Germany has always been receptive to its own home-grown crime series, with primetime stalwarts like “Tatort” or “Polizeiruf” (ARD) attracting the best talents as well as excellent production conditions. Tatort has been on the air since 1970 and continues to attract large and loyal audiences for its Sunday night timeslot.

Since our first report in 2014 crime has seen an increasing convergence with drama as a popular international genre, particularly when it comes to the German market. As of our last writing Scandinavian-produced success stories in Germany included the likes of “Mankells Wallander”, “Kommissarin Lund” and “Der Kommissar und das Meer,” with these shows and others helping to make Scandinavian crime a well-known brand on German television. Since then the popularity of Scandinavian crime series on German TV has only grown, mirroring the widening international favour of the “Nordic Noir” genre as a whole. Although some are rushing to declare Nordic Noir a thing of the past due to a “mainstreaming” of content that was once considered cutting-edge, from a business perspective the market for Scandinavian crime shows in Germany continues apace. Following in the footsteps of now-classic Nordic crime shows like “The Bridge” and “The Killing,” both of which found a wide audience in Germany, some other recent Nordic crime genre productions to enter the German market include:

- “Trapped,” a mystery series set in a remote town in Iceland, which was picked up by ZDF and aired in Germany for the first time in February 2017;
- Finland’s hit series “Bordertown,” which began airing on Sky Deutschland in March 2017;
- “The Team” (2015, ZDF), a multinational police drama between Austria, Belgium, Denmark, Germany, and Switzerland whose fictional story follows detective agencies from multiple European countries who work together to solve cross-border murders; and
- “Midnight Sun,” a Swedish-French co-production picked up by ZDF in Germany and Sky Atlantic in the UK, which also made its international debut in March 2017. Midnight Sun revolves around a French police officer who travels to Kiruna, a small town in Northern Sweden, to investigate the murder of a French national.

Interestingly, the internationalisation of TV production and consumption models is also beginning to filter its way into the content being produced. As illustrated by the latter two examples above, it is become increasingly common to see co-productions where the plot actively incorporates characters and scenes from two or more countries whose stories are somehow woven together. It is anticipated by many that this trend will

continue and if it does it certainly opens up more possibilities for working together with international partners both in production and distribution.

Viewpoint: Mark Lawson, “Mark Lawson on Television”

“European broadcasters seem to have invoked a sort of Article Thrifty, creating a single market for crime dramas. At a time when the continent is riven politically, countries appear ever keener to imagine joint police operations.”

Looking ahead, the development of this trend can be clearly seen in the coming “Arctic Circle” series, a German-Finnish co-production set in Finnish Lapland. The series, which features a German virologist called into Finland to investigate a virus uncovered during a mysterious murder case, will be filmed later this year and released during 2018.

∞ Television movies

The role of creating thematically relevant and artistically ambitious television films continues to fall primarily to the German public-service broadcasters. The public-service broadcasters **address a variety of topics in their successful productions** ranging from historical events and personal stories to contemporary sociological issues. One of 2016’s most popular TV movies, “The Glassblower,” was produced for ZDF by Bavaria Fernsehproduktion and garnered over 5 million viewers with a market share of over 15 percent. The period drama set in the early 1900s was shot in the Czech Republic, along with many other German films and TV series, under the country’s film and TV production incentive scheme.

Historical narratives continue to be a major topic for TV movies in Germany. “Landgericht” (State Justice), a two-part ZDF film series released in January 2017, is a film adaptation of a novel about 1930s hero Richard Kornitzera, who fled Nazi Germany for Cuba before World War II. The TV film was also shot in the Czech Republic.



“Landgericht” – Click the link for more information ([ZDF.de](https://www.zdf.de))

Another historical novel adaptation, “Naked Among Wolves,” was remade by ARD in 2015 as a tribute to the classic 1963 film depicting prisoners in a Nazi concentration camp who take in a young Jewish boy rescued from a Polish ghetto. In 2014 “Sarajevo,” a biographical TV film depicting the infamous assassination of the Archduke Franz Ferdinand, was commissioned for the 100th anniversary of World War I and co-produced by ZDF and the Austrian channel ORF.

∞ Documentaries & Factual Programming

Traditionally, the public-service broadcasters’ are highly respected for their provision of well-researched, objective informative programming. The “Chancellor Debate’ immediately prior to the 2013 Federal Election was aired on ARD, RTL and ProSieben simultaneously. ARD managed to outnumber its opponents when every second viewer chose to watch the discussion on the Public Service Channel (17.7 million viewers / 10.1 million ARD). With the 2017 Federal Election upcoming in September, it is expected that Germans will again turn to the trusted public-service broadcasters for information and coverage of the campaign.

Factual documentaries are covered by commercial as well as public-service broadcasters. Both have been serving the trend of “presenter-led” investigative journalism programmes such as “Günter Wallraff deckt auf!” (RTL). Docutainment is also gaining traction, as exemplified by the successful “14 – Diaries of the Great War” miniseries which was co-produced in Germany and France by ARTE, to a budget of nearly €6 million.

In 2014 RTL launched a new Pay TV channel, GEO Television, which focuses on reports and documentaries. Piggybacking on this decision but with a slight twist, in September 2016 ProSieben launched the first free-to-air, ad-supported documentary channel in the German market. **The channel, kabel eins Doku, airs documentaries 24 hours a day and focuses on high-quality international documentaries targeted toward the age 40-65 demographic.** Each evening focuses on a specific topic, spanning from history and real crime to nature and technology. The channel debuted with the series *The American West* featuring Hollywood actor Robert Redford which kabel eins Doku aired for the first time ever in Germany.

∞ Formats

Entertainment shows

Homegrown entertainment formats are rare these days in Germany and have not been met with success. In December 2014 the long-running “Wetten dass...?” on ZDF was decommissioned.

Rather than develop new formats, the commercial broadcasters mostly continue to build on the success of their adaptation and localisation of international shows. Some ongoing examples include:

- “Supertalent” (RTL)
- “Deutschland sucht den Superstar” (RTL)

- “The Voice of Germany” and “The Voice Kids” (ProSieben)
- “In der Höhle des Löwen” (“Dragon’s Den,” VOX)
- “Ich bin ein Star, holt mich hier raus” (“I’m a celebrity, get me out of here”) (RTL)

A recent award-winning format has been “Circus HalliGalli”, a late-night variety show airing on ProSieben which began in 2013. The show’s popularity has picked up in recent years after a slow start. The popularity of entertainment shows in Germany appears to be waning somewhat, with 39 million Germans reporting themselves as “Not very interested” or “Not interested” in entertainment TV shows in 2015 survey results compiled by the research organisation Statista, compared with 32 million who said they were “Interested” or “Highly Interested.” These numbers are nearly a direct reversal from when the same question was asked in 2012. Rather than indicating a loss of interest in visual entertainment shows generally, they probably are a stronger indicator of the migration of this genre to different platforms and formats, specifically YouTube.

∞ *Cookery*

German television is flooded with cookery shows. Their popularity is unbroken despite the large number of shows.

- In 2013 original US programme “The Taste” which combines cookery and casting entertainment started on SAT1 and was continued for a total of three seasons before being decommissioned in 2015.
- VOX began broadcasting “Game of Chefs” in early 2015 based on the Israeli original (ITV Studios Global Entertainment). The show has been met with success in the German market.

∞ *Children’s programmes*

Close to 60% of the age 3-13 target group watch children’s TV, more than ever before. Children’s television in Germany is characterised by two larger broadcasting channels, market leaders KiKA and SuperRTL, and the two smaller-sized channels Disney Channel and Nickelodeon. Since our first report in 2014 the four main children’s broadcasters have not changed however their market positioning has shifted, with Super RTL overtaking KiKA as the most watched.

Although it is a **highly competitive market**, programmes differ widely between the public-service offerings the commercial ones. KiKA aims to sustain **a broad mix of children-relevant entertainment, information and education programmes**. KiKA is the children’s channel with the highest share of domestically-produced content while the Super RTL etc heavily rely on international content.

Table 5: Market shares April 2016, Children's TV Germany

Broadcaster	% Age 3-13	+/- YOY
Super RTL	21,7%	+3,1
KiKA	19,3	+0,4
Disney Channel	9,9	+0,3
Nickelodeon	8,6	-0,4

∞ Animation

Children's animation is continuously going strong on German television and makes up a significant share of the programme, as in most countries. Recent technical advancements have led to old classics being re-commissioned and re-made in 3D (Heidi, Biene Maja and all sorts of international productions). Kika focuses on new animation series in a fresh 3D style and began co-producing with ZDF the 3D animation series "Insectibles" in 2015. CGI productions continue to be sought-after by all content buyers.

∞ Adult animation

Adult animation on German television is not a genre that receives much attention. Public-service broadcasters ARD and ZDF do not feature animation in their programme guidelines. When it comes to TV, the German animation industry itself has not seen much growth in recent years. Commercial broadcasters infrequently air international adult animation productions such as "Die Konferenz der Tiere" on prime-time Saturday night to mixed reviews.

Some animation companies are working on animated TV sitcoms designed for an adult audience (similar to "Archer" in the United States). Another potential growth area is the use of animation in documentary formats, such as in "Memory Games," a 2016 German/Swedish co-production which profiles memory-athletes from Germany, Sweden, and the United States during an international competition. Through the use of animation, the documentary gives viewers a personalised experience into how people use unique visualisation techniques to memorise incredible volumes of data.

Unique to the German market: Does Germany have a star-led television culture?

Success in Germany is typically attributed to a mix of talent, persistence and carefully-planned career moves. German television stars are groomed over a number of years. Once they have reached a certain level of popularity they tend to stay in the viewers' favour for a long stretch of time.

The rise in high-value drama is creating opportunities for new talent to get noticed, but so far there has been less demand for famous movie actors/actresses to join new TV programmes, as has begun to happen in the United States. The first exception to this rule (and possibly the sign of a new trend) is that of Matthias Schweighöfer, one of Germany's most well-known actors, who is currently starring in the drama series "You Are Wanted," a new mini-series which began airing in March on Amazon Prime. Generally speaking, however, recruiting famous talent is not necessarily a must for producing television content that will be successful in Germany. Instead, quality acting, storytelling, and production tends to be appreciated regardless of where it comes from.

Although Germany's TV culture may not be "star-led," its emerging and online segments are increasingly "YouTube Star-led" – another consequence of the move toward OTT, as YouTube aims to leverage the following of its most popular independent content producers into short-form series content that people will pay to subscribe to (via YouTube Red). Increasingly this model is also being used for advertising, most recently and notably by Studio71, which worked with US-based YouTube comedy star Rowan Atwood to promote a new Chinese video gaming app by releasing a video of Mr Atwood and his family playing the game on Atwood's YouTube channel. The video received nearly 2.5 million views and directly drove over 12,000 downloads of the Chinese app. Although this has more to do with advertising than broadcast production, it is an example of how the organic reach of grassroots internet personalities can drive the creation of more traditional sources of value. The space to watch will be in whether or not YouTube and others can leverage this into paid subscriber numbers and other sources of new revenue.

Like Facebook, YouTube is just beginning to try out this strategy and the results will take some to materialise. However it is an indication of an emerging new talent model that may become more relevant.

Video on Demand (VoD)***Market figures 2016***

At the time of our first report in late 2014, Video-on-Demand in Germany was already skyrocketing. This was right after entry of Netflix into the marketplace and only as others were just beginning to mimic the company's original content strategy. Since our first report VoD and especially paid VoD (SVoD as well as transaction-based "TVoD" offerings) have only

continued to expand in Germany, changing the way that Germans watch TV and accelerating the global market trends toward high-value drama and international series content.

In 2013 approximately 4 million Germans reported paying for Video on Demand content (SVoD+TVoD), generating €166 million in total revenue. Today approximately 24 million Germans are paying customers for VoD services (SVoD+TVoD), generating a turnover of €432 million in 2016.

Table 6: Top pay VoD players in Germany (SVoD and TVoD, 2016)

Pay VoD Provider	Market Share
Amazon Prime Instant	32%
Netflix	17%
Sky TV	12%
Maxdome	11%
Google Play	10%
iTunes	8%
Videoload	3%
Watchever	3%
Unity Media	2%
Select Video	2%

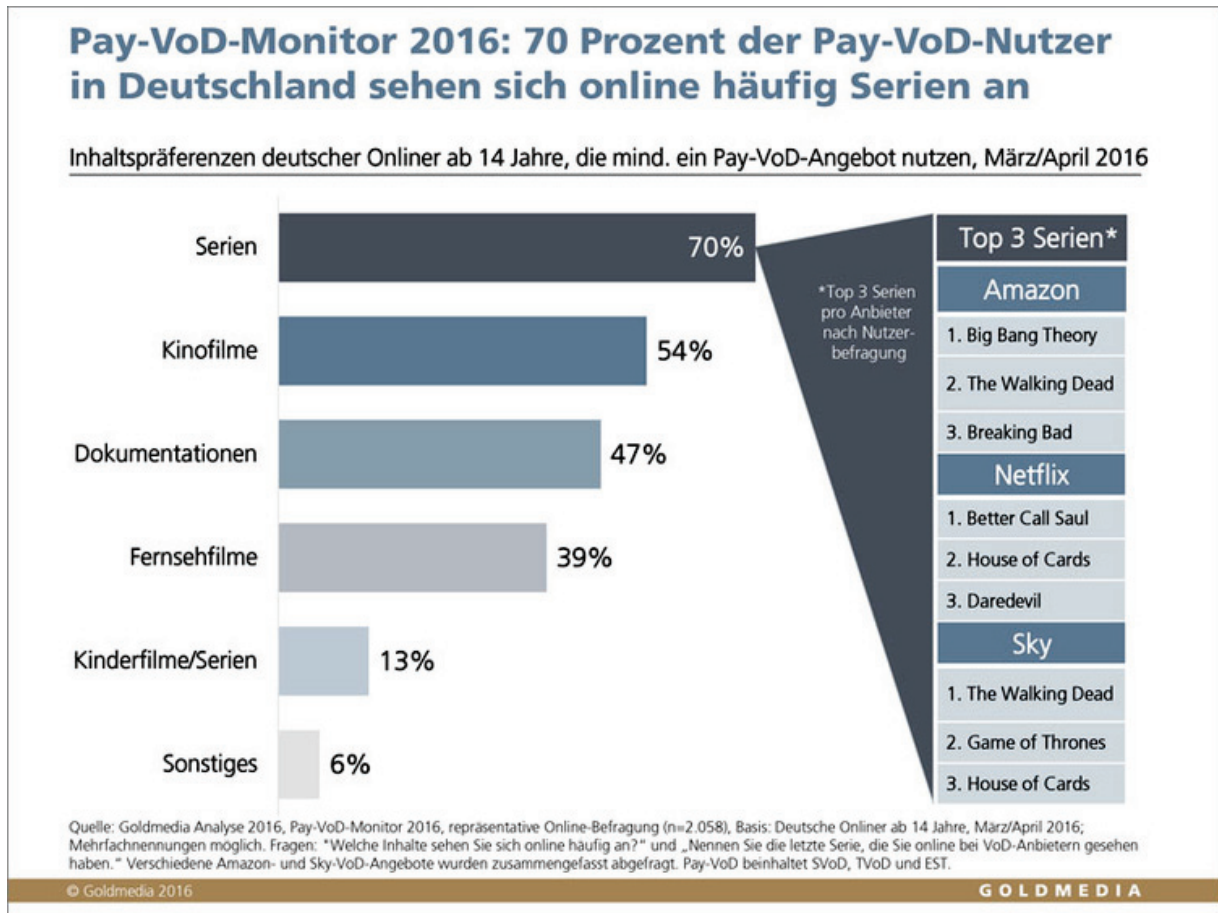
The arrival of Netflix has shifted the market. In 2013 nearly 50 different pay VoD platforms were competing for customer loyalties in Germany; today that market has consolidated around the major international players, with Amazon and Netflix together being used by nearly 50 percent of German pay VoD users and Google Play and iTunes combining for another 18 percent. Apart from Maxdome, which continues to hold onto some market share, Germany's other original pay VoD providers have struggled to maintain traction.

Video on Demand trends:

- According to Goldmedia, pay VoD is expected to generate €990 million in annual revenue by 2021, from €511 million in 2017
 - According to BITKOM, 2017 will be the first year that SVoD beats TVoD in total revenue in Germany (€275 million vs €236 million)
 - Netflix's original content approach is now the de facto strategy of choice for VoD providers, with Maxdome the latest to release its own series content in January 2017
-

The growth in market share for SVoD mirrors the general trend in terms of what Germans are watching on pay VoD platforms. TV series are the offering of choice, with 70 percent of pay VoD users in Germany saying that they watch series content on a regular basis. Films are a close second, reported by 54 percent of pay VoD subscribers, followed by documentaries (47%) and TV movies (39%).

Table 7: What Germans are watching on SVoD and TVoD, 2016



Source: Pay VoD Monitor Deutschland 2016, Goldmedia (October 2016)

Notably, the top three shows on each of the top three pay VoD platforms in Germany are all international hit series. Although data on series popularity by country of origin was not available in the above report, the graphic confirms that VoD (both subscription- and transaction-based) has been a vehicle for high-value international content to permeate the German market. Interestingly, when "House of Cards" aired initially in Germany on broadcast television (SAT1) in 2013, its reception was relatively cool, achieving a market share of 7% compared with its popularity on Netflix today.

Free VoD still the market leader in Germany

In the United States, Netflix's popularity is so entrenched that the service has eclipsed even YouTube as the most watched Video-on-Demand platform, despite the fact that YouTube and other platforms are free and Netflix is a subscription service.

In Europe, however, Netflix's later entry into the market has resulted in it facing tougher competition from both Amazon Prime as well as local VoD platforms offered by the European public and commercial broadcast channels, many of whom were able to establish a stronger brand with TV watchers before the Netflix wave hit. Although Netflix today is doubtlessly making inroads, YouTube continues to lead the overall VoD market across most

of Europe. Germany is no exception, with Netflix not even ranking within the top five most-watched VoD platforms. **YouTube is the most popular in terms of total VoD, while the on-demand services for ZDF and RTL Now both also outpace Netflix in terms of total viewers.**

These results, compiled by London-based TV research group Ampere Analysis in mid-2016, point in two directions: first, that the main public and commercial broadcasters will continue to be highly relevant players in terms of VoD content in Germany; and second, that despite the rapid growth of SVoD services and revenue, free-to-use VoD remains a very important part of the overall picture. Advertising-funded VoD (AVoD) still accounted for nearly half of all video-on-demand revenue in Germany last year (€369 million), and is projected to continue growing to €434 million in 2017.

When it comes to OTT content and other cross-media offerings, the ongoing popularity of YouTube and other free platforms (expressed in both subscriber numbers as well as AVoD revenue figures) demonstrates that free VoD in Germany should not be ignored as part of the overall content strategy for international producers. If anything, AVoD's endurance as a revenue source confirms that short-form content (on YouTube, Facebook, Vimeo, etc) and user-generated material will continue to be just as central a piece of the international VoD picture as "professional" series-length TV going forward.

Impact of the Netflix roll-out

Netflix has succeeded in establishing itself in a market where many originally thought it would struggle. At the time of its entry into Germany, most observers expected Netflix to place fourth in the market behind then-established players Amazon Prime, Maxdome, and Watchever. Instead it has been Netflix which has settled into a comfortable number 2 slot behind Amazon Prime, while Maxdome has slid to number four in the rankings.

Watchever has been the real casualty, seeing its market share slip from 24% to 3% in just two years. Maxdome, meanwhile, remains in the red and its operations are being reviewed on a year-to-year basis by its owner, the commercial broadcaster ProSiebenSat.1. Given the apparent consolidation around Amazon Prime and Netflix, broadcasters have not been in a rush to launch their own new SVoD services. ProSiebenSat.1 is the only traditional broadcaster with a dedicated SVoD platform apart from its regular online library. As noted in the previous section, ZDF and RTL's free on-demand platforms enjoy continued popularity.

When it comes to SVoD offered by the Pay TV channels, Sky TV chose to reorganise its VoD offering in 2015-2016, closing down Snap, its former SVoD service (once thought to be another Netflix barrier) and converting it into a multi-purpose OTT platform providing access to Sky's Bundesliga, sports, movies, series and entertainment offer in Germany and Austria without the need for a regular, long-term subscription. Instead users can purchase access via day, week and month passes.

All of this would seem to indicate that SVoD in Germany will continue to coalesce around the two leaders, with Netflix likely building on its already strong number 2 position in the years to come. In what some may see as a bid for relevance, Maxdome has recently released its first original TV content, a comedy series called "Jerks" which began in January 2017. Although Maxdome may be interested in entering the original content game, the company's

financial difficulties and uncertain status make it a risky partner for international co-productions at this time. To the extent that the VoD trend in Germany results in more international content acquisition and co-production opportunities in the next few years, it will likely be primarily with Netflix and Amazon Prime (for SVoD), or with the main existing broadcasters and Pay TV channels, with VoD continuing to function primarily in its current role as another potential consumption medium for content produced by those networks.

Original content opportunities with new up-and-comers like YouTube Red and Facebook may yet also arise, but for the meantime, these platforms are still brand new as major content production players.

Unique to the German market: Original SVoD content in Germany

In March 2017 Netflix teased the trailer for “Dark,” its first original content production in Germany. Considered part of “an aggressive initiative to expand production into Europe,” the 10-episode series is a drama/thriller with a supernatural twist. Set in a small German town, the story revolves around the disappearance of a child and the unearthing of the town’s long-held secrets. The show, which is being produced by Berlin-based Wiedemann & Berg Television and led by Swiss director Baran bo Odar, will be released later this year.

Amazon, meanwhile, has already released its first German-language TV series (“You Are Wanted,” March 2017), starring A-list German actor Matthias Schweighöfer. In the 6-episode series produced by Schweighöfer’s Pantaleon Entertainment for Amazon Prime, the actor plays a hotel manager whose life is turned upside down following a mysterious hacking attack, putting him and his family in grave danger.

The international ambitions of each show are notable, as well as the creative freedom being afforded to the producers and content creators by the two SVoD leaders. Schweighöfer is not being shy about his ambitions behind the new show. **“When we created ‘You Are Wanted,’ we aimed at making a German series that would appeal to both a German and international audience,” the actor said. “Together with Amazon, we are making that happen for the first time in German TV history.”**

Netflix, meanwhile, appears to have taken a relatively hands-off approach with “Dark.” The director, bo Odar, noted how he and his team “had absolute creative freedom. We could cast whoever we wanted, the actors who fit best for the role. Netflix gave us a budget and a couple of notes and let us do it.”

The beginning of original content production in Europe’s largest market by the two leading SVoD platforms represents a major turn for the broadcast industry across the Continent. Both Amazon Prime and Netflix appear to be keen on leveraging local talent production to deepen their respective roots in Europe, a trend which will only continue to raise the bar for everyone else.

Interestingly, although Netflix leads Amazon worldwide in terms of both number of subscribers as well as the popularity of content on its platform, some interested observers see Amazon as having “a greater impact” on the markets in which it is present. This was the

view of RTL Deutschland CEO Anke Schaferkordt, who suggested that Amazon will disrupt the market more deeply because it will be able to offer a broader range of products and services through its customer interface. The RTL CEO also spoke to how Amazon and Netflix have changed the linear TV business in Germany. As the numbers bear out under the next header, Schaferkordt essentially argued that while the SVoD platforms bring increased competition for a targeted subset of the market, there is still space for the traditional market leaders like RTL to attract a larger mainstream audience for the foreseeable future.

One other long-established player to watch when it comes to VoD material originating from the Nordics will be HBO Europe, which is well-entrenched as a producer in central and eastern Europe, and has now restructured to produce programmes from the Nordics and Spain as well. According to Antony Root, HBO Europe's Executive Vice President of Programming and Production, the Nordics will be the next major region that HBO targets for its European originals. Although the company so far has indicated that it will focus primarily on Sweden and Denmark, there may be an opportunity here to leverage Finland's rising production status as HBO attempts to capitalise on content from new markets.

Most popular digital TV programmes

The most popular TV programmes in Germany continue to be a combination of mainstream international shows and critically-acclaimed original drama series content. Nearly every programme in both the general top 10 for German TV, as well as the top 10 for digital originals, comes from the United States. One notable top 10 show is "Vikings" (#5), the Irish/Canadian collaboration released originally on America's cable TV History channel, which could suggest a general interest among German viewers in Nordic/Scandinavian history and culture. "Vikings" tends to be more popular in Europe than the United States, ranking among the top 10 TV shows in France, Germany, Sweden, and Poland, but not cracking the top 20 on American TV.

The other entries mix usual suspects like "Game of Thrones" and "House of Cards" with popular American network shows like "The Big Bang Theory" and "Suits."

Table 8: Top digital originals and overall shows for 2016, Germany

TOP 10 OVERALL TV SHOWS: GERMANY	
1	Game Of Thrones 10,409,335
2	The Walking Dead 8,077,659
3	Pretty Little Liars 7,435,609
4	The Big Bang Theory 5,326,957
5	Vikings 3,573,036
6	Westworld 3,436,760
7	Teen Wolf 3,432,074
8	Suits 3,246,634
9	The Flash 3,231,882
10	The Bold And The Beautiful 3,216,056

TOP 10 DIGITAL ORIGINALS: GERMANY		
1	Stranger Things Netflix	3,130,146
2	House Of Cards Netflix	2,299,813
3	Marvel's Luke Cage Netflix	1,985,115
4	Orange Is The New Black Netflix	1,773,817
5	Gilmore Girls Netflix	1,759,305
6	The Man In The High Castle Amazon Video	1,481,864
7	Narcos Netflix	1,463,380
8	The Get Down Netflix	966,696
9	Marvel's Daredevil Netflix	915,999
10	Marvel's Jessica Jones Netflix	867,994

Source: TBI Vision, "In-demand: The top shows of 2016"

Interestingly, despite the growing popularity of original series content on Netflix and Amazon, none of the digital originals could boast a large enough base of viewers to crack the overall top 10.

This points again to the fact that while the popularity of high-value original content released on SVoD platforms is growing, the programmes attracting the largest numbers of viewers in Germany are still mainstream international hit shows originating primarily from American TV.

Appendix: Listing of Video on Demand providers & commissioning contacts

the broadcaster’s size and overall profile the Head of Acquisitions may work across genres or employ a team of commissioning editors allocated to drama, format, children’s etc.

The German television/VoD content market is **unfortunately completely varied** and does not follow a standard set of requirements. There are also no general rules for approaching German television/VoD content buyers. The German market very much accepts the general **European “open-door-policy”** when it comes to new ideas. There may be online “commissioning rounds” but there are usually no scheduled, time-sensitive rounds of pitching. **Pitches are rather welcomed throughout the year.** Having said that, Heads of Acquisitions always have a clear idea of what they are looking for and how much they are willing to spend. This information needs be well researched individually by the seller before approaching potential buyers.

Whereas the public-service broadcasters have their contacts and buying preferences mapped out on their websites, the commercial broadcasters require a little more research to be addressed appropriately.

General advice: Buyers should be contacted as early as possible in advance of industry markets to make appointments for pitch meetings. 3 months in advance is acceptable. Many buyers leave their diary management to the departmental assistant and persistence is important. Well-researched and succinct pitches are appreciated, as is an awareness of current programmes on their channel (not pitching very similar projects). It is extremely important to demonstrate an understanding of the broadcaster’s profile in terms of demographic, gender-skew, episode and series length, subject matter.

Content acquisition case study: ZDFE	
Broadcaster	ZDF Enterprises (production and distribution subsidiary for ZDF)
Contact	Volker Lehmann Vice President Acquisitions and Co-productions ZDF ZDF Enterprises GmbH Erich-Dombrowski-Str. 1 55127 Mainz Germany +49 (0) 6131 / 991-1515 volker.lehmann@zdf-enterprises.de
Acquisitions model	ZDF Enterprises’ team of program buyers attend all significant film and television markets throughout the world, and they negotiate the financial terms for all ZDF program purchases and co-productions. In addition to fulfilling its mandate as service provider for ZDF, ZDF Enterprises also secures program licenses for its own marketing purposes. Furthermore, on behalf of ZDF, ZDF Enterprises negotiates licensing agreements for the broadcasters that ZDF is associated with. These include the German-French culture channel ARTE as well as 3sat, Phoenix, the Children’s Channel Kinderkanal and ZDF’s digital sector, which combines zdf_neo, zdfinfo and zdf.kultur.

Table 10: Key industry markets for German content buyers

Event	Location	Date	Description
Serienale	Berlin	January	Annual festival for exhibition and buying of TV series, based in Berlin. Relatively new event started in 2016.
Berlinale	Berlin	February	Industry-leading film festival taking place each February, headlined by European Film and Berlinale Co-Production Marketplaces.
MIPTV	Cannes	April	The world's largest TV and digital content market. TV-focused spinoff of MIPCOM, which focuses on all entertainment content and takes places every year in October.
Series Mania	Paris	April	Another major series marketplace, taking place every Spring in Paris.
Medientage	Munich	October	Running since 1987, highlights trends, practical solutions and technical innovations in the fields of broadcast, online and multimedia, mobile media, publishing and production as well as advice and information by trade associations and institutions operating in the media industry.
MIPCOM	Cannes	October	Markets itself as "the world's market for entertainment content across all platforms. 2016 saw 14,000 total participants, nearly 4,702 registered companies, 1,967 exhibiting companies, and 4,825 buyers taking part.

Content and airing trends

Drama slots and season lengths in Germany

With close to half of all Germans using the various broadcasters' VoD catch-up libraries ("Mediatheken") and an ever-increasing number signing up for Netflix and Amazon or turning to YouTube and cutting the cord from traditional TV altogether, genre slots and series lengths arguably matter less than they did just a few years ago. One impact Netflix has had on content throughout the world is that (for digital releases at least) it is now possible to make a TV series where episode length does not necessarily need to be uniform, and can in fact vary widely. One of the better examples of this is the new season of Aziz Ansari's hit American Netflix show "Master of None," where episodes vary in length from being as short as 29 minutes to as long as 55 minutes.

Running times on even the traditional networks can vary widely. ZDF's Spring and Summer 2017 Drama Catalogue, for example, lists episode and season lengths ranging from 8 episodes/50 minutes (8 x 50') to 10 x 60' to 8 x 42' and going as low as 6 x 30'. The length for a mini-series in Germany tends to be 3 episodes although again, this can vary depending on the programme and producer. At the other end of the length spectrum, the hit show

“Helen Dorn,” which follows a young female detective and reached 25 percent market share, consists essentially of eight feature film-length instalments (8 x 90’).

To the extent that there is a set “formula” for drama in Germany, it mostly mirrors the British model where dramas usually run from around 45 to 48 minutes, with 57 to 59 minutes on the public channels. Sitcoms vary greatly and are between 22 and 27 minutes generally and 27 to 29 minutes on the public channels. The longer duration on the national television channels is due to the lack of advertising, requiring time only for bridging commentary and trailers in each program slot.

Drama profile: Tatort (traditional TV)

In the age of VoD, the German Sunday night drama mainstay “Tatort” (Crime Scene) might be the only show left in Germany which continues to attract a notably loyal following even in its linear time slot. Tatort has been running continuously since 1970 with some 30 feature-length episodes per year, which makes it the longest-running German TV-drama.

Developed by ARD, it is unique in its approach, in that it is jointly produced by all of the station's regional public-service broadcasters whereby every regional station contributes a number of episodes to a common production pool. Therefore, the series is a collection of different police stories where different police teams each solve crimes in their respective city. Uniqueness in architecture, customs and dialects of the cities is therefore a distinctive part of the series and often the city, not the police force is the real main character of an episode. **The concept of local stations only producing a couple of shows per year has also enabled the shows to be longer (90 minutes) and more fleshed out psychologically than other weekly TV dramas.**

The first episode was broadcast on 29 November 1970. Episodes are broadcast on ARD's main channel Das Erste on Sunday evening at the prime viewing time of 8.15 pm (just after the 8 o'clock Tagesschau news) around three times a month.

Public Sector Media (PSM) still the leading original content investor in Europe

According to a recent report by the Media Intelligence Unit of the European Broadcasting Union (May 2017), Public Sector Media (PSM) remain the largest investors in European audiovisual content, spending €18.2 billion a year.

What’s more, over 83% of PSM programming expenditure was devoted to original productions (in-house, commissioned or co-productions) in 2015 **meaning PSM organisations spent over €15 billion directly on content creation.** By comparison, Netflix and Amazon respectively spent approximately €3 billion (USD\$3.3 bn) and €1.5 billion (USD\$1.7 bn) on original content in 2015. Although the SVoD leaders continue to shake up the market, it is worth noting the significant role that public broadcasting still plays in Europe when it comes to getting content produced.

With two sprawling and deep-pocketed public networks in ARD and ZDF, each of whom invest in a wide array of content and have multiple spinoff channels and international

partnerships, Germany is an excellent case study for the resilience, relevance, and continued importance of Public Sector Media as a content buyer and key broadcast partner throughout Europe.

How do VoD providers acquire content?

SVoD content buyers don't work very differently to traditional television buyers. They need to be approached and talked to in the same way as their TV equivalents. The approaches mentioned in the previous section are therefore completely transferrable to SVoD.

Whereas in the early years of VoD, original content and licensing budgets tended to be lower, Netflix's global expansion and Amazon's growing investment in Amazon Prime Video are pushing these numbers higher. Interestingly, as both platforms grow, each are investing more in original content in order to offset the high cost of licensing fees, which is being driven up by competition between the various SVoD platforms. Netflix in 2016 announced its ambition for **half of the platform's content to be original productions** "over the next few years"; as of late 2016, Netflix reported being "one-third to halfway" down to road toward reaching this goal.

At-a-Glance: Netflix's approach to European production

Between 2012 and February 2017, Netflix had committed more than €1.5 billion (USD\$1.75 bn) to past and future European original productions and co-productions, as well as licensed TV series, films, documentaries, kids shows, and stand-up specials, representing more than 90 original productions. As evidenced by the earlier case study for the new series "Dark" in Germany, the company tends to take a hands-off role after investing in a production, leaving casting and creative decisions to the directors. With both SVoD market leaders continuing to seek international market share, each are placing a focus on content that will appeal to local audiences and appear to be giving creative talent a long leash in developing that content.

Buying decisions for both Netflix and Amazon across Europe tend to be made centrally from their respective offices in London. Relevant contacts are given in the Appendix.

SVoD Content Perspective: Roy Price, Vice President, Amazon Studios

"We are collaborating with creators all over the globe to deliver series and movies that we think customers will love. It's not so much about creating one show that fits all, but instead it's about creating something moving and unique for our customers in all regions. We think there are globally-relevant shows and movies that customers worldwide will love – The Grand Tour, The Man in the High Castle and Transparent are great examples of shows that customers across the globe have told us they want. We also believe that not every country is the same and some territories care more about a localized service or local content than others. Our approach will vary."

Source: MIPTV interview

Appendix: Television & VoD buyers, profiles & preferences

A professional approach when contacting German Broadcast Buyers is key to the start of a meaningful conversation. Germans can at times be overly conventional and wish to be addressed in a formal way (especially when it is the first ever contact). Compared to Finland, Germany is hierarchical. For instance a first contact point by email will most likely be via the content buyer's assistant. English is commonly used as the business language for international projects. When conversing in German the formal term of address is an important point to remember ("Sie" instead of "Du"). The television industry is, however, not as "stiff" as other business sectors – therefore a creative touch is naturally appreciated.

General advice: Pitches should be kept succinct, to the point and waffle-free. Germans appreciate accurateness, careful planning and well-researched ideas.

Note for VoD: As both Netflix and Amazon's operations for Europe are based out of London, the relevant commissioning contacts for Germany will not necessarily be of German background or origin. Both of the SVoD leaders are globalised companies and therefore reaching out to their acquisitions heads will follow more of the general rules of international business communication. Netflix and Amazon both like to see themselves as modern, innovative companies and therefore an approach that is less formal – but still backed by a confident offer with good marketing and clear value proposition that is supported ideally by relevant data – will be preferred. To the extent that cultural awareness makes a difference here, it will be more about appealing to the unique "tech company" culture of these firms rather than to any national sensitivities.

Sources of finance/funding

German television broadcasters generally **fully finance their own originated production and will fully finance commissioned productions.** Co-productions follow the film finance model and are made up of broadcaster contribution, co-producer finance, film funds, and the sale of foreign territory rights. The various co-production models that tend to be common in Germany are covered in detail in the next chapter.

Co-produced TV projects can access German film funds, however, these funds amount to less than 15% of the total available screen funds. Usually, if television projects are co-produced and funded, the funds contribute an average of 20% to the overall budget.

Unique to the German market: German Motion Picture Fund

A new funding program called the "German Motion Picture Fund" is available to producers of **film and television series** who meet the stated criteria. The Fund has already attracted many international projects, including "Berlin Station," "Babylon Berlin," Amazon's "You Are Wanted," Netflix's "Dark" and "Mute," and the independent mini-series "Credo," to name a few.

Key points of the Fund include:

- €10 million per year, on first come first served basis.
- For TV shows, a maximum of 20% of the German production costs with a maximum of €2.5 million per series. Exceptions to an increased cap of €4 million are possible.
- For a feature film, a maximum of 10% of the German production costs with a maximum of € 2.5 million per production. Exceptions covering 20% of the German production costs are possible.
- *Applications must be submitted by the producer or co-producer (excludes German TV stations) who is headquartered in an EU Member State with a permanent office in Germany and who has produced at least one feature film or TV show in Germany.*

The grant of funds, like other film funds, is based on a point system and requires 40 out of 96 possible points related to “cultural” characteristics of production. A TV show must be exploited by German broadcasting or by VoD platforms publicly available in Germany with one German language version included for the hearing-impaired. For TV series, the “German Spend” (e.g. money from production partners in Germany) must make up at least 40% of the total production costs if this amount does not exceed €10 million.

Table 11: German Motion Picture Fund Key Facts

	Feature Films	Series
Minimum Length of film/series	79 minutes in general, 59 minutes for children’s movies	40 minutes per episode
Minimum production costs	€ 25 million	€ 1.2 million per episode
German production costs	minimum 40% or € 13 million	minimum 40% or € 10 million
German financing contribution	Minimum of 20% or € 7 million if production costs are above € 35 million	No requirements
Co-Financing by German TV stations	No requirements	Maximum of 70% co-financing share of German TV stations for German language TV series and 60% for all other original language versions
Grant	10% of the German production costs, capped at € 2.5 million	20% of the German production costs, capped at € 2.5 million per episode/season
Increased Grant	Up to 20% if at least € 1 million will be spent on digital filmmaking in Germany	Up to € 4 million if at least € 1 million will be spent on digital filmmaking in Germany

In addition to the new funding opportunity mentioned above, the regional film fund for Berlin-Brandenburg (Medienboard Berlin-Brandenburg) also launched its own financing programme in 2015, aimed at attracting high-end television series production to Germany's capital region. The organization, which has an annual budget of €30 million, provides soft loans to producers that must be repaid if the series is economically successful. The financing programme targets independent producers. Recent beneficiaries have included Season 5 of the American series "Homeland," which was shot in Berlin (2015), "Babylon Berlin" (2016), and Amazon's German original "You are Wanted" (2016).

In addition to serialised content, the fund also supports the development and production of web-series/mini-series programming. Applications for funding are evaluated at multiple junctures throughout the year with the following upcoming application deadlines:

- 04/07/2017: Serial Drama, Web-series, Factual- & Entertainment Formats
- 21/11/2017: Serial Drama, Web-series, Factual- & Entertainment Formats

German Funding Bodies:

Governing Authorities	FFA, German Federal Film Board, www.ffa.de DFFF, German Federal Film Fund, dfff-ffa.de
Federal Funding Bodies	On Federal State level – see detailed description in the appendix

Appendix:

Overview of Federal State funding bodies, budgets & funded programme types

Listing of recent DFFF funded productions

Status of film funding

In March 2017 the German government approved a €50 million boost for the German Federal Film Fund (DFFF), bringing the total value to €125 million for 2018. This is massive turnabout from 2015, when the Federal Ministry for Economic Affairs considered eliminating federal film funding altogether. Although this money is mostly intended for feature film production in Germany, as noted above it is possible for TV co-productions to access a portion of DFF funding particularly if there is additional international financing being brought to the table.

Recouping and minimum guarantees

As can be seen above, public funding models can vary with some subsidies not requiring reimbursement (German Motion Picture Fund) and some functioning as a loan typically payable once the series is successful (Medienboard regional subsidies). For obvious reasons, private investors typically insist on recouping their outlays, as they would with any

investment. Minimum guarantees, meanwhile, function on the basis of demand/expected demand. For a series that can be expected to do well based on hype/data from other markets, or where TV buyers are already lined up, the producer has more bargaining power to insist on a minimum guarantee. A new series which may be seen as a greater risk by the financing entity will usually have a more difficult time obtaining a guarantee.

Other finance sources

In addition to public sources of finance and to the production companies themselves, there are a variety of private investors in Germany who are becoming more active in TV and film production. Commerzbank, which is Germany's second largest credit institution, is among the most active film financing banks, with a Media Team based in Berlin. A recent and interesting entrant into the film production landscape is that of Deutsche Telekom, which announced it will begin branding its own original content series (most likely with a rights buyout as opposed to genuine production, as is common for many "Netflix"-branded shows). More information on private film finance in Germany is included in the next chapter.

Inbound financing: Finland's new cash rebate

One tool of which Finnish producers may or may not already be aware is the new 25% cash rebate for TV and film production within Finland, applicable for feature films, fiction series, documentary films, and animations. For productions that meet the criteria, 25% of the expenses from money spent on local goods, services and salaries within the production work implemented in Finland will be accepted for the rebate. The incentive, which came into effect in January 2017, has already made 10 awards worth a total of €3.5 million, with a further nine applications worth €2.3 million in process. The budget for the incentive is currently capped at €10 million although the early success has already led advocates to suggest it be doubled in the near future. The cash rebate is administered by TEKES/Finnish Funding Agency for Innovation.

Genre focus: Drama

One only needs to take a look at the content currently coming out of the Nordics in order to see that the Nordic Noir theme remains the most internationally-potent outlet for Nordic drama. Nordic Noir continues to get picked up all over Europe, and while some artistic critics are lamenting the genre as being dead or in decline (due largely to its having gone mainstream), from an acquisitions perspective business continues to be robust.

Certainly Nordic Noir is a globally-recognised trend in the broadcast industry and an easy point-of-entry for content creators to get noticed. This does not, however, make it the only route to developing and marketing a successful production. Internationally-acclaimed shows like "Lilyhammer" (Norway, Netflix), "Rita" (Denmark, Netflix), "The Bonus Family" (Sweden, Netflix), and "Black Widows" (Finland, Sony Entertainment TV) – all of which have found success in Germany – have demonstrated an interest in Nordic narratives and storytelling outside of strictly crime-driven series. The abovementioned shows do incorporate some elements characteristic of Nordic Noir, including compelling nature imagery and strong female leads juggling personal and professional challenges who are often beset by some

source of internal/family conflict. In some cases the stories do act as a bridge to Nordic Noir, exemplified by *Black Widows*, where the show, while more Dramedy than Drama, revolves around three women who conspire to murder their abusive and criminalising husbands.

In Germany as well as around the world, one defining characteristic of drama at the moment is an “anything goes” mindset where the sheer amount of producers and broadcasters coming to the table to invest in content has created an openness and demand for any idea that is well thought-out and well-produced and where the creators can make a credible case for its chances of success in the target marketplace.

The Wide World of Drama: Andy Fry, Entertainment Writer

“Such is the range of drama buyers on the international market these days that it is impossible to talk of a single unifying trend. These days anything goes – from period to procedurals, fantasy to fact-based fiction – depending on what you’re selling and who’s buying.”

Source: MIPTV Special Report

To the extent that a few common threads can be gleaned from the current situation in drama, a special report for the recent MIPTV gathering in Cannes lists some characteristic elements of shows which are finding success on the global stage:

- ∞ **“Local Setting, Global Relevance.”** Locally-rooted narratives which aspire to tell a universally-relevant story. Examples of success stories in Germany:
 - “Occupied” (Norway), the political thriller co-produced by the French/German public channel arte, where Norway is occupied by Russia;
 - “Professor T” (Belgium), a hit on German TV since being picked up by ZDF, which tells the story of an eccentric but brilliant forensic scientist.
- ∞ **“Modern Day Parables.”** Stories which reflect the current state of the world. Sky Deutschland and Bavaria Fernsehproduktion are currently teaming up on a remake of the 1981 German cult classic “Das Boot,” in an eight-part allegory about the pointlessness of wars caused by fanaticism.
- ∞ **“Twists on Crime.”** New crime stories outside of the typical thriller/murder mystery format. Case study examples:
 - “4 Blocks” (Germany), which as noted earlier is being produced by TNT for the German market and is more of a classic gangster narrative focused on organised crime and issues of cultural and family identity in Berlin’s Arab community. The show was just released in April 2017 and is already being widely praised and talked about in German circles.
 - “Maltese” (Italy), picked up by ZDF, which while still technically a detective story/murder mystery aspires to paint a more comprehensive picture of the influence and reach of the Sicilian mafia in the 1970s.
- ∞ **“Sci-Future.”** An increasingly relevant genre born from contemporary conversations about technology, robots, and our collective future. Perhaps best exemplified by Netflix’s successful appropriation of the “Black Mirror” series from Channel 4 in the UK, a Nordic

expression of this trend can be seen in the French/Danish co-production “Unpunished,” which is set in the near-future and offers a foreshadowing of the consequences caused by the merging of human minds with technology. If successful in France, “Unpunished” will probably find its way to the German market via ZDF or arte.

- ∞ **“Family Dramas.”** The most obvious Nordic example in Germany would be “Thicker than Water,” the crime/family secret drama out of Sweden which aired on ZDF and has also been adapted for American audiences in the form of the hit Netflix show “Bloodline.” This format runs together somewhat with Twists on Crime and is also relevant to the characters and storytelling in “4 Blocks.”
- ∞ **“New Regions/Emerging Markets.”** As MIPTV notes, although Sweden and Denmark have produced most of the internationally-recognised drama out of the Nordics, Norway and Finland are gaining increasing recognition, largely due to the likes of “Occupied” as well as “Nobel,” “Bordertown,” and “Black Widows.” Finland is still very much seen as an up-and-comer in the world of Nordic drama, a status which producers can leverage in order to drive additional interest in new programming. It is worth noting that just one of the above shows (“Bordertown”) can be seen as fitting into the traditional Nordic Noir motif, as the rest run the gamut from War Drama (“Nobel”) to political thriller (“Occupied”) to off-colour Dramedy (“Black Widows”).
- ∞ **“High Horror.”** More of a niche genre merging sci-fi and horror which is beginning to see increasing international interest, primarily in content emerging from Asia.

Even as the demand for international drama continues to drive more experimentation and creativity, the enduring appetite for crime-related series should not be discounted. Many of the formats detailed above touch on the aspect of crime and suspense in some form or another, which bodes well for creative adaptations of Nordic Noir and even for entirely new but related categories of Nordic drama as a whole.

One area where Nordic content may find itself in a good position is the sci-fi/future theme, given the dark storytelling mastered by existing hit shows from the Nordics, the technological advancement of Nordic societies, and the moral dilemmas that often run as a strong undercurrent to the established Nordic Noir genre. It will be interesting to follow the success of “Unpunished” as an indicator of whether there might be further potential to be exploited in this topic.

German audiences would be particularly fertile ground for thoughtful and creative storytelling about artificial intelligence and the future, given the apprehensiveness and outright scepticism with which many Germans view certain digital technologies. **This tendency is particularly pronounced when it relates to stories about technologies having to do with spying and mass surveillance.**

In an article reviewing the Icelandic hit series “Trapped” and highlighting some of the general principles of Nordic Noir, the German media watcher TVSpielfilm.de hit on some additional elements of Nordic programming which is currently resonating in Germany:

- ∞ **Double Storytelling**, specifically as it relates to the tendency within the Nordic Noir genre to combine dramatic and slowly-unfolding storytelling about the personal lives of the primary characters with the key developments in the main plot (“The Bridge” was one of the earliest examples of this narrative tactic); and
- ∞ **Crime and Nature**, or the interweaving of exotic, often desolate landscapes into the dramatic plotlines of the story as a whole. This is exemplified in series like “Midnight Sun” and “Bordertown” which leverage the backdrop of the Arctic Circle as a central part of the overall narrative.

Unique challenges of the German market

- **The federal system**
Foreign content producers coming to Germany need to go and look in more than just one place when it comes to funding or finding partners. They need to acquaint themselves with the possibilities in the various federal states and decide which locations and offerings suits their needs best.
- **The size of the market and the sheer mass of opportunities**
Foreign content producers should dig a little deeper to make sure their project finds the right partner and the right exposure. Settling with the first opportunity that presents itself might not always be the right strategy for the German market.

Merchandising and licence deals

Merchandising

A prosperous television brand opens doors for merchandising business opportunities – this is of course also true for the German market. Genres like children’s or music entertainment are at the forefront of merchandising, with the commercial broadcasters taking more advantage than the public-service providers.

The following merchandising areas are usually covered:

- Home Entertainment
- Publishing
- Toys & Games
- Stationary
- Food & Promotion
- Home & Living
- Textiles & Accessories

Children’s merchandising:

- ∞ Toys and publishing products play the most important role in character licensing. Second are textile products, home entertainment and (promotional) events - although this differs from broadcaster to broadcaster.

- ∞ KiKA's merchandising is closely connected to the channel's overall goal of educational entertainment. Books, CDs, DVDs or toys support TV content but KiKA emphasises not to view kids as an "advertising relevant target group".
- ∞ Current trends: merchandising from interactive games but in general, television remains the core driver for merchandising and building up of existing brands.

Books:

- ∞ Certainly novels will always offer ripe potential for merchandising and visual spinoffs. "Dan Sommersdahl," the famous Danish crime novel series, will be adapted for TV in late 2017 by a coalition including German producer NDF, Scandinavian group Nordisk Film, and LA-based Dynamic Television.

Licensing

Deal structure can vary widely in Germany, making it somewhat difficult to give a definitive answer regarding what is "typical." Generally, however, when a broadcaster licenses the rights to a show the deal covers terrestrial rights as well as a licensing "window" which can again vary depending on a variety of factors (deal size, international popularity/anticipation of the series, etc). Deals tend to be exclusive for a specific timeframe which is negotiated carefully according to territory, and broadcast companies across different elements of the media landscape are coming together to develop innovative agreements for defining how those rights are shared and when, which can optimise the benefit to both parties. This can be seen partly as another consequence of the current trends in TV.

As noted throughout the report, audience demand and expectation for cinematic quality across all screens continues to drive production values higher, a growing trend over the last 5-7 years across the international broadcast sector. This has meant more parties come to the table in order to raise the necessary funds and negotiate their tranche. Again "Babylon Berlin" is a clear example: Sky TV will have exclusive Pay TV rights for the first year before the series is screened on the free-to-air Broadcast Channel ARD, one full year after it has been released.

The table below gives a general overview of licensing fees for multiple airings within a set window. "3-5 airings" refers to a full series run, e.g. from start to finish, within a 3- to 5-year time period.

Table 12: Licensing fees for 3-5 airings in 3-5 years

	Germany	France	United Kingdom
Feature Films	\$300,000 - \$3,000,000	\$200,000 - \$1,000,000	\$10,000 - \$1,000,000
TV-Movies	\$200,000 - \$350,000	\$52,000 - \$90,000	\$35,000 - \$65,000
Series - 1hr	\$90,000 - \$175,000	\$30,000 - \$60,000	\$75,000 - \$150,000
Sitcoms - 0.5hr	\$30,000 - \$55,000	\$10,000 - \$19,000	\$20,000 - \$50,000
Documentaries - 1hr	\$20,000 - \$35,000	\$7,000 - \$13,000	\$6,000 - \$10,000
Children's - 0.5hr	\$8,000 - \$15,000	\$6,000 - \$12,000	\$70,000 - \$125,000

For the SVoD platforms, the same general rule on exclusivity applies. The market leaders Amazon, Netflix and Sky TV are bitter rivals and compete for exclusivity on programming, particularly where that programming has already done well internationally. In some cases, SVoD platforms may share broadcast rights with the traditional channels, but typically only where a deal can be arranged that somehow benefits both parties, or where one starts with an exclusive window (as with Sky TV and “Babylon Berlin”). Another example of a broadcaster sharing rights with an SVoD platform is that of “Occupied,” which aired on ARTE but is now available on Amazon Prime in Germany (Netflix has picked up the series for multiple other markets).

3. FINDING GERMAN PRODUCTION PARTNERS: CO-PRODUCTION

As with the general model for content commissioning, there have been few significant changes to the core business models for co-production in Germany since our first report. The main changes rather relate more to the nature of the partners working together, the medium of consumption for the end product, and to new entrants into the marketplace (as detailed throughout the report).

Co-Production business models

Business models

∞ Official co-production

A 'true' co-production is one where two or more parties are responsible for each aspect of the project, share the producer fees, the equity and the revenues.

∞ Split responsibilities

Split responsibilities gets around the requirement for many funding agencies that the producer is resident in their country and own 100% of the intellectual property. When the project is split, each producer does own 100% of the element that is their responsibility. The project comes together and is marketed and distributed as a single entity but is financed and reported as two. This structure works well for cross platform projects with clearly distinct elements but there are also variations that work for standalone digital media. The two partner companies are each in charge of one of the components, own the rights 100%, produce that component and finance it out of their own territory.

∞ Broadcasters

Producers can directly work with foreign broadcasters. Those are co-productions but the foreign broadcaster is generally not a part owner. Broadcasters can provide in-kind promotion, hosting or community management services in their territory.

∞ Service arrangements

It may not seem like a co-production but often producers hire a producer in another country to do service work rather than partner with them. This differs from 'split responsibilities' because the service producer has no ongoing revenue share and does the work for a fee only. A service arrangement could act as a way to get to know a potential co-producer before the financially riskier and more difficult 'true' co-production. This model works well for television programs, either co-productions themselves or not, where the digital media extension needs to be distinct for each territory.

∞ Non-traditional funders

Documentary projects are in the best position to take advantage of non-traditional funders such as non-governmental organizations (NGOs). While not strictly a co-production, this business model uses international financing to produce and distribute the project and the model could work for other projects with appropriate subject matter.

∞ Private investors

There are a number of private stakeholders that are investing in television production. Examples tend to be:

- Post-production houses and technology providers. For instance, ARRI are moving into investing as a co-producer giving their post-production services.
- Music companies like 22Dmusic who handle the worldwide music rights administration to companies' audiovisual products – this is a source of investment/financing for production companies.
- Investment banks. For example:
 - Commerzbank, the second largest bank in Germany, provides bridge financing for 73 film and TV projects per year with a total project budget of approximately €140 million and a total credit volume of another €74 million. One of the bank's most notable film co-productions is that of "The Grand Budapest Hotel," the Oscar-winning 2014 Wes Anderson film. Commerzbank's media sector services include:
 - Bridge financing of film- and TV-projects as well as financing of distributors and sales agents;
 - Financing of international co-productions;
 - Receivables-financing, e.g. receivables out of license-selling;
 - Gap-financing for international film-projects;
 - Financing of tours and events;
 - Financing of music-catalogues;
 - Financing of game-productions; and
 - Financing of current assets and capital expenditure requirements
 - The Brandenburg Investitionsbank also offers "gap" cash flow financing for television and film productions

Deutsche Telekom moves into show-running

Another interesting new entrant into the TV production space: German telecommunications giant Deutsche Telekom, which is planning to invest in original scripted content from 2018 and has apparently already set aside funds for the project. Telekom, which used to have a monopoly over German cable supply, is still a player in Pay TV with its own channel Entertain, and the move into original content is thought to be a possible response to rival Sky TV's increasing investment in scripted material. According to Niek Jan van Damme, Managing Director of Telekom Deutschland, Telekom will look to acquire content from abroad as a part of its strategy. Deutsche Telekom has been active generally in broadcast innovation, announcing in April that it will launch an Apple TV-like package with 100 TV channels available at just €2 per month for existing Telekom broadband subscribers.

In addition to the main co-production business models noted above, foreign content producers should get acquainted with the overall German funding and co-production infrastructure. The landscape is a mix of governing authorities, industry bodies, funding organisations, international agreements, and networking events, along with typical international stakeholders like the Finnish Embassy and Cultural Institute. The following overview covers the most important points:

Governing Authorities	FFA, German Federal Film Board, http://www.ffa.de DFFF, German Federal Film Fund http://dfff-ffa.de
Producers Association	German Producers Alliance, http://www.produzentenallianz.de
Federal Funding Bodies	On Federal State level – see detailed description in the appendix
Co-production agreements with Finland	<ul style="list-style-type: none"> ▪ <u>European Convention on Cinematographic Co-production</u> ▪ <u>EURIMAGES</u>
Networking events	<ul style="list-style-type: none"> ▪ Berlinale Co-Production Market ▪ Dok.Fest Munich ▪ DOK Leipzig ▪ FilmFest Munich
Embassy contacts	Finnish Embassy, Rauchstrasse 1, 10787 Berlin, Tel. +49-30-50 50 30, Email: info.berlin@formin.fi
Cultural institutions	Finnish Cultural Institute, Georgenstrasse 24, 10117 Berlin, Tel. +49-30-520 02 60 10, http://finnland-institut.de

Appendix:

Steps in finding a co-production partner or a client: practical tips

Key German broadcast production centres

The **four main production centres** of television production in Germany are Berlin/Brandenburg, Munich/Bavaria, Cologne/North-Rhine Westfalia and Hamburg/Schleswig Holstein.



Berlin-Brandenburg

The Berlin-Brandenburg film landscape boasts a **broad mix** of broadcasters, production companies, distributors, studios, service providers or technical innovators. Well-known film companies Senator, X-Filme, Ufa Fiction or Studio Babelsberg mingle with small start-ups and small independent companies and make the location arguably the most thriving in Germany. Numerous television broadcasters (rbb, N24, capital offices of ARD, ZDF, RTL as well as VIACOM's Viva, MTV, Comedy Central and Nickelodeon) and YouTube stars are based in Berlin.

Berlin-Brandenburg is one of the world's leading television-production regions, with over 2,000 TV production companies producing an annual turnover of around €1 billion per year. In terms of the growing online and mobile production landscape, as the digital and "startup" capital of Germany Berlin is likely to be the key stakeholder region going forward for this segment of the market, while also continuing to expand its foothold in series-length TV.

Based in Berlin:

Broadcasters	Production Companies
Comedy Central	Ziegler Film
joizTV	MME Movement
MTV	DOKfilm Fernsehprod.
N24	Phoenix Film
rbb	Producers at Work
Nickelodeon	NFP neue film produktion
VIVA	

Munich/Bavaria

Munich is home to Bavaria Film, one of the key players of national cinema productions. The Bavaria studio is one of the most significant film studios in Europe. Additionally, technical service providers such as ARRI, Sachtler or Panther or distributors Disney and Paramount are based in and around Munich as well as Constantin Film GmbH, Germany's market leader in production and distribution. The FilmFest Munich is one of the most important markets in Germany.

As a television location Munich hosts BR and ProSieben/Sat 1 and places emphasis on series production. 70% of the TV minutes produced in Munich are allotted to series. Munich is also where the German teams for Amazon and Netflix are headquartered, however again it is worth noting that production and content decisions for Europe tend to be made out of the London offices of both companies.

Based in Munich:

Broadcasters	VoD Providers	Production Companies
ProSieben	Maxdome	Constantin Film GmbH
SAT1	Amazon	Wiedemann und Berg
Kabel eins	Sky Deutschland	Bavaria Film
BR	Netflix	

Cologne/ North-Rhine Westfalia

Cologne is a broadcast hub and Germany's number one television location historically. It is home to the WDR, the largest public-service broadcaster in Europe, as well as the RTL group (RTL, SuperRTL, VOX, n-tv), Germany's largest commercial broadcaster. The German TV Award ceremony (Deutscher Fernsehpreis) takes place in Cologne every year. The location produces many successful comedy programmes and series as well as casting formats and quiz shows, and tends to be Germany's hub for "traditional" TV.

Based in Cologne:

Broadcasters	Production Companies
WDR	Brainpool TV
RTL	ITV Studios
VOX	Endemol
Super RTL	MMC Movies
n-tv	UFA Series, UFA Fiction
Phoenix	UFA Show & Factual
QVC	

Hamburg/ Schleswig Holstein

Hamburg is the smallest of the four German production locations. Revenues have been steady but nowhere near as high as in the other production centres. The NDR is one of the main economic drivers with an annual budget of €740 million. Large distributor and producer Warner Bros Deutschland is based in here. Hamburg produces many series and cookery show for German television but is also renowned for its well-known advertising companies that bring in business with advertising and trailers.

Hamburg with its "Nordic and Hanseatic pride" might be the closest to Scandinavian culture in general.

Key industry stakeholders & useful contacts

Top 10 producers

In December 2016, the media magazine DWDL ranked the top 10 German production companies on the basis of ratings for the previous year:

Die erfolgreichsten TV-Produzenten des Jahres 2016 (Plätze 1-10)

	Produktionsfirma	Punkte	Top-100-Formate
1	Talpa Germany	399	6
2	UFA Show & Factual	390	5
3	Endemol Shine Germany	347	7
4	Warner Bros. ITVP	307	4
5	Redseven Entertainment	252	8
6	Tower Productions	195	3
7	Sony Pictures Television	179	2
8	i&u TV Produktion	147	3
9	ITV Studios Germany	144	2
10	Seapoint Productions	142	2

Quelle: DWDL.de-Berechnungen auf Basis AGF/GfK/media control

Appendix:

Listing of German production companies of the German Production Alliance

Top 10 Sales agents & distributors

Constantin Film	http://www.constantin-film.de
Concorde Film	http://www.concorde-film.de
Senator	http://www.senator.de
Tobis	http://www.tobis.de
StudioCanal	http://www.studiocanal.de
X-Verleih	http://www.x-verleih.de
Kinostar	http://www.kinostar.com/Verleih
Summiteer Film	http://summiteerfilms.com
Ascot Elite	http://www.ascot-elite.de
Alamode	http://www.alamodefilm.de

Top TV casting agents

Agentur Alexander	http://www.agentur-alexander.de
Baumbauer Actors	http://www.baumbaueractors.com
fitz + skoglund agents	http://www.fitz-skoglund.de
Management Goldschmidt	http://www.managementgoldschmidt.de
Agentur Gotha	http://www.agentur-gotha.de
Agentur Hein-Schlossmacher	www.agentur-hein-schlossmacher.de
Agentur Patricia Horwitz	http://www.patriciahorwitz.de
Agentur Kelterborn	http://www.agenturkelterborn.com
Management Ramona Mohren	http://www.agenturkelterborn.com
Agentur Ute Nicolai	http://www.agentur-ute-nicolai.de
Agentur Nielsen	http://www.agenturnielsen.de
Agentur Schieck	http://www.agentur-schieck.de
Agentur WINDHUIS	http://www.agentur-windhuis.de

4. NORDIC CONTENT IN GERMANY

Nordic content case studies

Since our first report in 2014 the Nordic programmes which have done well in Germany have continued to revolve mostly around crime and Nordic Noir, although the “dramedy” genre with shows like “Rita” (2012-present, distributed globally via Netflix and received well in the German market) has also begun to pick up steam.

Recent Nordic programmes entering the German market:

Trapped (IS, RVK Studios, 2017, ZDF, 10 x 52')

After initially airing in 2015 in Iceland and breaking TV ratings records at home, the series has been widely sold around the world and began airing in Germany on ZDF in February 2017. A second season is currently in development.



“Trapped” www.youtube.com/watch?v=uUP5uNDV6DA

Midnight Sun (SE, Nice Drama/Atlantique Productions, 2016, ZDF, 8 x 60')

Swedish/French co-production about the murder of a French citizen near the Arctic Circle, and ensuing investigation. Rights secured by ZDF for Germany at MIPCOM 2016.



“Midnight Sun” www.youtube.com/watch?v=-OK6f7xHleY

Thicker than Water (SE, Nice Drama, 2014-, 10 x 60', ZDF)

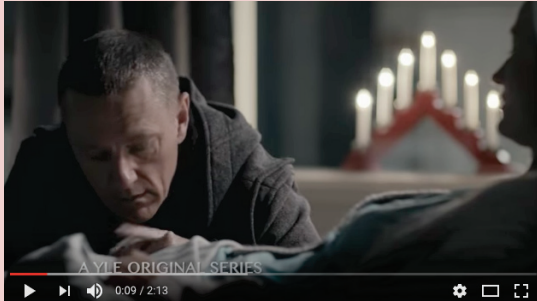
Swedish family drama focused on shady dealings, long-held secrets, and palace intrigue. Co-produced with YLE and picked up by ZDF for the German market, where Seasons 1 (2014) and 2 (2016) have both been met with strong review and a growing audience following.



“Thicker than Water” thickerthanwater.zdfe-b2b.de/#

Bordertown (FI, Fisher King/Federation Entertainment, 2017, Sky Deutschland, 11 x 55')

Probably Finland's hottest international production at the moment, has been picked up by Netflix and is being distributed widely around the world. Promoted in most markets as a Netflix Original but interestingly not in Germany where Sky Deutschland already acquired the rights in 2016.



"Bordertown" www.youtube.com/watch?v=DjOFzeVynVY

Valkyrien (NO, C21 Drama, 2017, Deutsche Telekom, 8 x 45')

Norwegian series about a doctor who runs an illegal, underground clinic in an old Oslo bomb shelter. Although this does not appear to have been formally announced yet, it could be Deutsche Telekom's first move into Nordic content with Cinema Scandinavia claiming the series will screen in Germany this year and producer C21 Media listing Deutsche Telekom as the broadcast partner. The acquisition news from Cinema Scandinavia was just reported in late May 2017, so this story is very much still developing. Watch this space as it could be an indication of Telekom's purported interest in branding its own original series.



"Valkyrien" www.c21media.net/valkyrien-visits-oz-germany/ and <http://cinemascandinavia.com/norwegian-television-series-valkyrien-heads-to-australia-germany/>

Black Widows (FI, Moskito Television, 2015-, Sony Entertainment TV, 8 x 42')

Recent acquisition in Germany of dramedy series described as "a sort of Nordic noir-ized mashup of Desperate Housewives and Les Diaboliques." A story of three wives who scheme to kill their criminal husbands which is a bit more light-hearted than the rest of the Nordic Noir genre, a sign of a possible evolution in Nordic content being shipped abroad. Picked up by Sony's German Pay TV channel.



"Black Widows" www.vimeo.com/144902986

Examples of recent Nordic-German co-productions

Drama

Crime series

- ∞ "Before We Die" (2017, Sweden, B-Reel Films). A co-production with ZDF and Swedish public broadcaster SVT, as well as ZDF Enterprises and FRSM. Brand new but has been met with much anticipation.
zdf-enterprises.de/en/catalogue/international/zdfedrama/series/crime-suspense/before-we-die
- ∞ "Grenseland" (2017, Norway, Nice Drama). Viewed as Sky Deutschland's move into Nordic Noir. Eight-part crime thriller series set in Oslo, to be released later this year.
www.hollywoodreporter.com/news/sky-deutschland-pushes-originals-grenseland-965885
- ∞ "Modus" (2015, Sweden, Miso Film Sverige). Multinational co-production with ZDF, TV4 Sweden, TV2 Norway. Released in Germany in 2016.
www.zdf.de/serien/modus-der-moerder-in-uns/folgen-110.html
- ∞ "Dan Sommersdahl" (2016, Denmark, Dynamic Television and NDF). German-Danish co-production adaptation of Danish crime novels for the small screen. Reportedly sold to Sky Deutschland at MIPCOM 2016, will go into production in Autumn 2017.
www.nordiskfilmogtvfond.com/news/stories/mipcom-hype-on-quality-nordic-content-continues

Documentaries/Factual

- ∞ "Memory Games" 2016 Swedish-German co-production about memory athletes (Ma.Ja.De Filmproductions GmbH/Momento Film AB).
<http://en.majade.de/films/memory-games/>

Nordic Content on Netflix

Below is a summary of Nordic Content which has been picked up by Netflix, either for the German market or elsewhere in the world. Some of Netflix's Nordic programs are not distributed in Germany, or (as with Bordertown and Sky Deutschland) have already been picked up by another broadcaster for the German market.

At-a-Glance: Netflix's Nordic TV Material

Program	Genre	Country	Model	Distribution
Lilyhammer	Dramedy	Norway	Co-pro	Global
The Bonus Family	Dramedy	Sweden	Acquisition	Global (except Scandinavia)

Bordertown	Crime drama	Finland	Acquisition	United States, Canada, United Kingdom, Ireland, Norway, Sweden, Denmark, Iceland, Eastern Europe, Russia, Netherlands
Nobel	War drama	Norway	Acquisition	United States, Canada, United Kingdom, Ireland, Finland, Belgium, Netherlands, Luxembourg, France, Australia, New Zealand
Réttur (Case)	Crime drama	Iceland	Acquisition	United States, Canada, Denmark, Norway, Sweden, Belgium, The Netherlands, Luxembourg, Australia
Rita	Dramedy	Denmark	Acquisition	Global

Source: List of Original Programs Distributed by Netflix bit.ly/2t91s6O

Related: List of Original Programs Distributed by Amazon: bit.ly/2s88lqM

Advice for Nordic Content producers

While Germany's overall broadcast landscape tends to be varied and diverse, the mix of broadcast partners involved in international co-production is somewhat more targeted. As we have seen throughout this report, a rather significant chunk of international programming on German television tends to run on ZDF. The same is true for content coming out of the Nordics.

Within the Pay TV arena, key players include Sky Deutschland (which beat out Netflix for the rights to "Bordertown"), Sony Entertainment TV ("Black Widows"), and American broadcasters like TNT ("4 Blocks"), although given the increase in competition for viewers and high-value drama, no Pay TV channel should be ruled out of the equation. HBO has long been established in Central and Eastern Europe and promises to become a growing player in original content production in the Nordics after its recent announcement that its next move will be to begin targeting Nordic originals.

On the VoD/SVoD front, the consolidation of the consumer market around Netflix and Amazon makes the two global SVoD leaders the best options for co-production and content acquisition in Germany, with the other SVoD platforms (with the exception of Sky TV) becoming increasingly irrelevant.

As more and more broadcast parties consider making investments into original broadcast content, some emerging players to watch include several big-name companies with deep pockets who are currently attempting to pivot into content production. The likes of Facebook, YouTube, and Deutsche Telekom represent a wide swatch of the media landscape, each with its own potential niche and value proposition to bring to the table. For the former

two, content that incorporates some element of OTT/transmedia will be especially compelling, as these trends become more enmeshed in the broadcast industry as a whole.

In addition to the broadcast players noted above, Germany's rich landscape of drama production companies are a good first place to turn when it comes to building partnerships before the point of engaging with broadcasters. For those less experienced in working directly with the various broadcast platforms in Germany, leveraging the existing relationships and market know-how of German drama production companies could be a good place to begin when it comes to developing content which will be well-received in the German market.

APPENDICES

1. German Broadcasters
2. German Acquisition Teams
3. VoD and Digital Providers
4. German Funding Partners
5. German Producers
6. Steps in finding a co-production partner or a client: practical tips
7. ZDF Drama

Appendix 1: German Broadcasters

Key Broadcasters				
Public-service				
ARD Das Erste	ARD		x	www.daserste.de
BR Bayerischer Rundfunk	ARD (Die Dritten)		x	www.br.de
BR alpha	ARD (Die Dritten)			
HR Hessischer Rundfunk	ARD (Die Dritten)		x	www.hr-online.de
MDR Mitteldeutscher Rundfunk	ARD (Die Dritten)		x	www.mdr.de
NDR Norddeutscher Rundfunk	ARD (Die Dritten)		x	www.ndr.de
RB Radio Bremen TV	ARD (Die Dritten)		x	www.radiobremen.de
RBB Rundfunk Berlin	ARD (Die Dritten)		x	www.rbb-online.de
RBB Rundfunk Brandenburg	ARD (Die Dritten)		x	www.rbb-online.de
SR Saarländischer Rundfunk	ARD (Die Dritten)		x	www.sr-online.de
SWR Südwestrundfunk	ARD (Die Dritten)		x	www.swr.de
WDR Westdeutscher Rundfunk	ARD (Die Dritten)		x	www1.wdr.de
Deutsche Welle TV	ARD	Information, Foreign Service		www.dw.de
Funk	ARD/ZDF	Ages 14-29		www.funk.net
tagesschau24	ARD	Information		programm.tagesschau24.de
ONE	ARD	Ages 14-29		www.einsfestival.de
3sat	ARD, ZDF, ORF, SRG		x	www.3sat.de
ARTE	ARD, ZDF, France Télévisions, Radio France, INA		x	www.arte.tv
Kika	ARD, ZDF	Children's		www.kika.de
phoenix	ARD, ZDF	Documentary		www.phoenix.de
ZDF Das Zweite	ZDF		x	www.zdf.de
ZDFneo	ZDF	Factual Entertainment		http://zdfneo.de
ZDFinfo	ZDF	Information		http://zdfinfo.de

Free to air commercial				
Affiliation				
RTL	RTL Group		x	www.rtl.de
ProSieben	ProSiebenSat.1 Media		x	www.prosieben.de
kabel eins	ProSiebenSat.1 Media		x	www.kabeleins.de
SAT1	ProSiebenSat.1 Media		x	www.sat1.de
VOX	RTL Group		x	www.vox.de
RTL 2	RTL Group		x	www.rtl2.de
ProSiebenMaxx	ProSiebenSat.1 Media		x	www.prosiebenmaxx.de
ANIXEHD	ANIXE HD Television GmbH & Co. KG	Film & TV classics		www.anixehd.tv
n-tv	RTL Group	Information		www.n-tv.de
N24	ProSiebenSat.1 Media	Information		www.n24.de
Nickelodeon/ComedyCentral	VIACOM	Childrens		www.nick.de

RTL Nitro	RTL Group	Serials, Sitcoms, Feature Films	www.rtlnitro.de
Sat.1Gold	ProSiebenSat.1 Media	Womens, Serials, Sitcoms, Feature Films	www.sat1.de/sat1gold
Sixx	ProSiebenSat.1 Media	Series	http://www.sixx.de
Spiegel.tv	Spiegel Group	Documentary	www.spiegel.tv
SPORT1	Constantin Medien AG	Sports	www.sport1.de
SuperRTL	RTL Group	Childrens	www.superrtl.de
TELE5	Tele München Gruppe	Feature Film, Serials	www.tele5.de
TLC	Discovery Networks Deutschland	Womens non-fiction	www.tlc.de
VIVA	VIACOM	Music	www.viva.tv

Pay TV	Affiliation	Programme	Genre/Speciality	Web address
DiscoveryChannel	Discovery Communications		Documentary	www.discovery.de
DisneyChannel	The Walt Disney Company (Germany) GmbH		Childrens	www.disney.de/disneychannel
DisneyJunior	The Walt Disney Company (Germany) GmbH		Childrens	www.disney.de/disneychannel/play-house
History	The History Channel (Germany) GmbH & Co. KG		Documentary	www.history.de
Junior	Studio 100 Media GmbH		Childrens	www.studio100media.com
kabeleinsCLASSICS	ProSiebenSat.1 Media		Feature Films	www.kabeleinsclassics.de
MGMChannel	MGM Networks (Deutschland) GmbH		Feature Films	www.mgmchannel.de
MTV	VIACOM		Music	www.mtv.de
NationalGeographicChannel	Fox International Channels Germany GmbH		Documentary	www.natgeotv.com/de
NICKJr. & Nicktoons	VIACOM		Childrens	www.nickjr.de
ProSiebenFUN	ProSiebenSat.1 Media		Lifestyle, Action Sports	www.prosiebenfun.de
RTLCrime	RTL Group		Crime	www.rtl-crime.de
Sat.1emotions	ProSiebenSat.1 Media		Daily Soaps, Serials, Feature Film	www.sat1emotions.de
SkyAction	Sky Deutschland Fernsehen GmbH & Co. KG		Live Sports, Feature Film, Series, Documentary	www.sky.de
SkyActionHD				
SkyAtlanticHD				
SkyCinema				
SkyCinema+1				
SkyCinema+24				
SkyCinemaHD				

SkyComedy					
SkyEmotion					
SkyHD-3DSkyNostalgie					
SkyFußballBundesliga					
SkyHits(HD)					
SkyKrimi					
SkySport1					
SkySport2					
SkySportHD1					
SkySportHD2					
SkySportHDExta					
SkySportNews(HD)					
SPORT1+	Sport1 GmbH			Sports	www.sport1.de
TNTSerie, TNTFil, Boomerang, CartoonNetwork	Turner Broadcasting System Deutschland GmbH			Drama, Comedy, Cartoons, Games	www.tnt-serie.de

Appendix 2: Broadcaster Acquisition Teams

ZDF Enterprises	www.zdf-enterprises.de		
Volker Lehmann	Head of Acquisitions & Co-Productions General	volker.lehmann@zdf-enterprises.de	0049 (0) 6131 / 991-1515
Dr. Kristina Hollstein	Head of Acquisitions & Co-Productions Documentaries	kristina.hollstein@zdf-enterprises.de	0049 (0) 6131 / 991-1835
Dr. Nikolas Hülbusch	Manager ZDFE.factual	nikolas.huelbusch@zdf-enterprises.de	0049 (0) 6131 / 991-1840
Eva Reifferscheid	Head of Acquisitions & Co-Productions Series	eva.reifferscheid@zdf-enterprises.de	0049 (0) 6131 / 991-1445
Margrit Stärk	Head of Acquisitions & Co-Productions Feature Films	margrit.staerk@zdf-enterprises.de	0049 (0) 6131 / 991-1535
Arne Lohmann	Head of ZDFE.junior	arne.lohmann@zdf-enterprises.de	0049 (0) 6131 / 991-1875
Sarah Kübler	CEO HitchOn /Internet channels	info@HitchOn.de	0049 (0) 17756 00 970
ProSiebenSAT1 Media AG	www.prosiebensat1.com		
Ruediger Boess	Senior Vice President Group Programming Acquisitions	Ruediger.Boess@prosiebensat1.com	0049 (0) 89 9507 1226
Claudia Ruehl	Senior Manager Group Programming Acquisitions	claudia.ruehl@prosiebensat1.com	0049 (0) 89 9507 1249
Thomas von Hennet	VP International co-productions and documentaries	thomas.hennet@prosiebensat1.com	0049 (0) 89 9507 1253
Vera Stöhr	Commissioning Executive International Co-Production & Documentaries	vera.stoehr@prosiebensat1.com	0049 (0) 89 95 07 10
Oliver Kaspar	Commissioning Executive International Co-Production & Documentaries	oliver.kaspar@prosiebensat1.com	0049 (0) 89 95 07 10
Ulrich Krüger	Senior Commissioning Executive International Co-Production & Documentaries	ulrich.krueger@prosiebensat1.com	0049 (0) 89 95 07 10
Daniel Rosemann	chairman	daniel.rosemann@prosiebensat1.com	0049 (0) 89 95 07 10
Thorsten Lork	VP Seven Stories: TV/Sales	thorsten.lork@prosiebensat1.com	0049 (0) 89 95 07 10
Sven Pietsch	Editor in Chief Factual	sven.pietsch@prosiebensat1.com	0049 (0) 89 95 07 10
HR Hessischer Rundfunk	www.hr.de		
Gabriele Holzner	TV Director	gabriele.holzner@hr.de	0049 (0) 69 155 2785
Patricia Vasapollo	Head of Children TV Programmes	patricia.vasapollo@hr.de	0049 (0) 69 155 2785
MDR Mitteldeutscher Rundfunk	www.mdr.de		
Jana Cathrin Brandt	Programm Director: TV- & childrens films and series	jana.brandt@mdr.de	0049 (0) 341 300 7815
NDR Norddeutscher Rundfunk	www.ndr.de		
Ole Kampovski	Head of Department Children and Youth	ole.kampovski@ndr.de	0049 (0) 404 156 4980
Thomas Schreiber	Fiction and Entertainment	t.schreiber@ndr.de	0049 (0) 404 156 0
WDR Westdeutscher Rundfunk	www.wdr.de		
Julia Wurzer	Head of Brands	julia.wurzer@wdr-mediagroup.com	0049 (0) 221 2035 2504
Nicole Offergeld	Sales Manager International	Nicole.Offergeld@wdr-mediagroup.com	0049 (0) 221 2035 2123

Stefanie Fischer	Head of Content	Stefanie.Fischer@wdr-mediagroup.com	0049 (0) 221 2035 2500
Julia Jaensch	Manager Acquisitions & Coproductions	Julia.Jaensch@wdr-mediagroup.com	0049 (0) 221 2035 2508
Deutsche Welle TV			
Petra Schneider	Director of Sales and Distribution	petra-c.schneider@dw.de	0049 (0) 228 429 3501
Maria Winzen	Head of DW-Transtel	maria.winzen@dw.de	0049 (0) 228 429 3501
Martin Maass	Editor DW-Transtel	martin.maass@dw.de	0049 (0) 228 429 3501
Arno Hefner	Head of Documentaries and Features	arno.hefner@dw.de	0049 (0) 228 429 3501
KIKA			
Sebastian Debertin	Head of Fiction, Acquisition & Co-Production	sebastian.debertin@kika.de	0049 (0) 361 218 1890
Stefan Pfäffle	Deputy Head of Fiction, Acquisition & Co-Productions	stefan.pfaeffle@kika.de	0049 (0) 361 218 1890
ZDF Das Zweite			
Arne Lohmann	Leitung ZDFE.junior	arne.lohmann@zdf-enterprises.de	0049 (0) 6 131991 1875
Nicola Göbel	Project manager licensing ARTE	nicola.goebel@zdf-enterprises.de	0049 (0) 6 131991 1522
Barbara Pfenningberg	Proj. Manager licensing fictional programs	barbara.pfenningberg@zdf-enterprises.de	0049 (0) 6 131991 1523
Dr. Jane Rusel	Proj. Manager licensing 3sat	jane.rusel@zdf-enterprises.de	0049 (0) 6 131991 1520
Margrit Stärk	Head of purchasing feature film ZDF	margrit.staerk@zdf-enterprises.de	0049 (0) 6 131991 1535
Dr. Kristina Hollstein	Head purchasing & coproductions documentaries ZDF	kristina.hollstein@zdf-enterprises.de	0049 (0) 6 131991 1835
RTL Mediengruppe			
Juliane Essling	www.infonetwork.de; www.n-tv.de; www.rtl2.de; www.rtl.de; www.superrtl.de; www.bertelsmann.de; www.vox.de Head of Factual Entertainment - info Network	juliane.essling@infonetwork.de	0049 (0) 22145670
Marlena Pezo	Sales & Acquisitions Manager - infor Network / Content First	marlena.pezo@infonetwork.de	0049 (0) 22145670
Gabi Nensel	Head of Primetime - n-tv	gabi.nensel@n-tv.de	0049 (0) 22145670
Stafan Albrecht	Head of Docutainment RTL2	stefan.albrecht@rtl2.de	0049 (0) 22145670
Claudia Schorr	Vice President Program Acquisitions & Sales - RTL 2	claudia.schorr@rtl2.de	0049 (0) 22145670
Achim Berheide	Project Manager Acquisitions & Sales - RTL 2	achim.berheide@rtl2.de	0049 (0) 22145670
Joerg Graf	Executive Vice President Production & Acquisition - RTL Television	joerg.graf@rtl.de	0049 (0) 22145670
Philipp Steffens	Head of Fiction - RTL Television	philipp.steffens@rtl.de	0049 (0) 22145670
Manuela Huhn	Vice President Acquisitions - RTL Television	manuela.huhn@rtl.de	0049 (0) 22145670
Markus Kuettner	Head of Comedy & Real Life - RTL Television	markus.kuettner@rtl.de	0049 (0) 22145670
Frank Paffen	Sales Acquisitions Manager - RTL Television	frank.paffen@rtl.de	0049 (0) 22145670
Tom Sanger	Head of Entertainment & Daytime - RTL Television	tom.sanger@rtl.de	0049 (0) 22145670
Christian Simons	Head of Feature Films - RTL Television	christian.simons@mediengruppe-rtl.de	0049 (0) 22145672530
Marion Winter	Senior Manager Acquisitions & Co-Productions - SuperRTL	marion.winter@superrtl.de	0049 (0) 22145670

Janine Weigold	Head of Childrens Content - SuperRTL	janine.weigold@superrtl.de	0049 (0) 22145670
Frank Dietz	Head of Acquisitions & Co-Productions - SuperRTL	frank.dietz@superrtl.de	0049 (0) 22145670
Anja Pallasch	Head of Acquisition [Kids, TV, Animation] - Universum Film	anja.pallasch@bertelsmann.de	0049 (0)89 41 36-96 77
Katja Rieger	Head of Development - Vox Television	katja.rieger@vox.de	0049 (0) 22145670
Sophia Dauber	Senior Manager Acquisitions Feature Film & TV Series Department - Vox Television	sophia.dauber@vox.de	0049 (0) 22145670
Red Arrow International	www.redarrowinternational.tv		
Amelie von Kienlin	SVP Scripted Acquisition and Co-Production	amelie.kienlin@redarrowinternational.tv	0049 (0) 89 9507 2326
Stefanie Stroebel	Sales Manager	stefanie.stroebel@redarrowinternational.tv	0049 (0) 89 9507 2326
Tim Gerhartz	VP Sales & Acquisitions	tim.gerhartz@redarrowinternational.tv	0049 (0) 89 9507 2326
Henrik Pabst	Managing Director, Buyer Intl., Sales	Henrik.Pabst@redarrowinternational.tv	0049 (0) 89 9507 2326
Lisa Fidyka	Sales Agent	lisa.fidka@redarrowinternational.tv	0049 (0) 89 9507 2326
Bo Stehmeier	SVP Global Sales	bo.stehmeier@redarrowinternational.tv	0049 (0) 89 9507 2326
Tobias Schulze	Vice President Sales	Tobias.Schulze@redarrowinternational.tv	0049 (0) 89 9507 2326
Warner Bros	www.warnerbros.com		
Tim Rostock	Co-Productions and Business Affairs, Fiction	tim.rostock@warnerbros.com	0049 (0) 2219 3470 8402
ITV Studios	www.itvstudios.de		
Martin Baumann	Director of Production, ITV Studios Germany GmbH	martin.baumann@itvstudios.de	0049 (0) 2214 9204 8180
New: Deutsche Telekom	www.telekom.com		
Peter Wassong	Senior Manager TV Content Hub Europe	peter.wassong@telekom.com	0049 (0) 22 8181 4949
New: funk	www.funk.net		
Florian Hager	Managing Director, funk (ARD/ZDF)	flo@funk.net	0049 (0) 6131 9293 1470

Appendix 3: VoD and Digital providers

Top VoD Providers						
Company	Affiliation	Business model	Website	Contact	Position	Email
Maxdome	ProSieben SAT1	Subscription VoD	www.maxdome.de	Chloe Koeler	Senior Vice President Content & Operations	chloe.koeler@maxdome.de
				Björn Fickel	Senior Vice President Content & Operations	Bjoern.Fickel@maxdome.de
Netflix	Netflix US	Subscription VoD	www.netflix.com/de	Chitavan Patel	Director, Global Film	cpatel@netflix.com
				Andy Yeatman	Director, Content Acquisition	ayeatman@netflix.com
				Kelly Merryman	VP, Content Acquisition	kmerryman@netflix.com
				Darren Nielson	Director, Content Acquisition	dnielson@netflix.com
				Larry Tanz	VP Content Acquisitions Global Indie TV	ltanz@netflix.com
				Sean Carey	Vice President, Content Acquisition	scarey@netflix.com
Amazon Prime Instant Video	Amazon US	Subscription VoD	www.amazon.de/Prime-Instant-Video	Christoph Schneider	Managing Director DE	carogrim@amazon.de
				Bettina Siegwart	Category Leader TVOD	siegwart@amazon.com
				Viktoria Wasilewski	Digital Content Acquisitions Manager	wasilewski@amazon.de
				Georgia Brown	Director of Original Content Europe	georbrown@amazon.com
				Gerrit Roth	Senior Content Acquisition Mgr, Amazon.de	gerroth@amazon.de
Sky TV (also Pay TV channel)	Sky	Subscription VoD and OTT	www.skygo.sky.de/	Marcus Ammon	Senior Vice President Film & Entertainment	marcus.ammon@sky.de
				Frank Jastfelder	Director, Drama Production	frank.jastfelder@sky.de
YouTube/Google Play	Google	AVoD/free VoD, TVoD (Google Play), SVoD (YouTube Red)	www.youtube.com	Lisa Rousseau	Head of Transactional Partnerships, EMEA, Google Play and YouTube	lisarousseau@google.com
				Neil Price	Strategic Partner Manager, Google Play Movies & TV	neilp@youtube.com
				Gregory Dray	Director, Kids/Family & Learning, EMEA YouTube	gdray@youtube.com
				Cedric Petitpas	Kids & Learning Northern Europe	
Facebook/Instagram	Facebook	VoD/emerging	www.facebook.com, http://www.instagram.com	Heiko Hebig	Instagram Facebook Country Mgr Germany	heiko@instagram.com
				Guido Bülow	Facebook Country Mgr Germany	guidobuelow@fb.com

Watchever	Vivendo	Subscription VoD	www.watchever.de	Karim Ayari Anne-Carole Nourisson	Managing Director DE VP Content Acquisition	info@WATCHEVER.de info@WATCHEVER.de
Videoload	Telekom	Transactional VoD, Download to own VoD	www.videoload.de			
iTunes store	Apple	Transactional VoD, Download to own VoD	www.apple.com/de/ itunes/			
Videobuster	NETLEIH GmbH & Co. KG	Transactional VoD	www.videobuster.de			
AllesKino	Private	Transactional VoD, German films only	www.alleskino.de			

Digital production companies (affiliated with German broadcasters)						
Company	Affiliation	Business model	Website	Contact	Position	Email
Studio71	70 pct owned by ProSiebenSat.1	Digital agency for content creators on YouTube/etc	www.studio71.com/de/creator-briefing/	Ronald Horstman	Managing Director	info@studio71.com
Broadband TV Corp (BBTV)	51 pct owned by RTL Gruppe	Digital agency representing the best YouTube talent in a global multi-platform network (MPN) and creating online video solutions for brands	www.bbTV.com	Arno Becker	Commissioning Editor, Digital Channels	arno.becker@rtl.de

Appendix 4: German Funding Partners

Country-wide Funding Bodies						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
FFA German Federal Film Board (Filmförderungsanstalt)	EUR 95 million	Cinema, full circle funding from scripts, production to innovation, advertising and educational matters		www.ffa.de	Christine Berg, Head of Funding berg@ffa.de	Große Präsidentenstraße 9, 10178 Berlin, Tel.: +49 30 27577 0, presse@ffa.de
German Government (Filmförderung BMK)	EUR 102 million	Cinema, feature films, documentaries, short films, children's films, scripts		www.bundesregierung.de	Minister Katharina Cramer-Hadjidimos K36@bkm.bund.de	Ulrike Schauz, Köthener Straße 2, 10963 Berlin, Tel.: +49 30 18 681 44351, Email: K35@bkm.bund.de
DFFF, German Federal Film Fund (Der deutsche Filmförderfonds)	EUR 75 million	Cinema, feature films (91%), documentaries, animated films		dfff-ffa.de	Jule Wolff Assistant to the Project Manager (PM Post currently vacant) Tel. no.: +49-30-27 57 7 - 423	Große Präsidentenstraße 9, 10178 Berlin, Tel.: +49 30 27577 423, Email: j.wolff@ffa.de
German Motion Picture Fund	EUR 10 million	Film and television series with up to 20 pct of German production costs for TV shows	Applications must be submitted by a producer or co-producer (excludes German TV stations) who is headquartered in an EU Member State with a permanent office in Germany and who has produced at least one feature film or TV show in Germany.	www.ffa.de/german-motion-picture-fund-1.html	Joscha Hansen Filmförderungsanstalt	Große Präsidentenstraße 9, 10178 Berlin Tel.: +49 30 27577 550 030 Email: hansen@ffa.de
Funding Bodies of the Federal States						
FilmFernsehfonds Bayern GmbH (FFF)	EUR36 million	Television movies	Funding of up to 50% of the costs.	fff-bayern.de	Gabriele Pfennigsdorf, gabriele.pfennigsdorf@fff-bayern.de	Sonnenstraße 21, 80331 München, Tel.: +49-(0)89- 544 60 2-0, Email: filmfoerderung@fff-bayern.de
Filmstiftung NRW	EUR 31 million	Funding of innovative TV concepts, especially for younger producers. Genres: entertainment, comedy, series show and talk.	Funding of up to 50% of the costs. 100% of funding must be spent in NRW.	www.filmstiftung.de	Achim Strack, achimstrack@filmstiftung.de	Kaistraße 14, 40221 Düsseldorf, Tel.: +49 0211 930500, Email: info@filmstiftung.de

Medienboard Berlin-Brandenburg	EUR 31 million	Funding of concept development, production of pilots, for TV series in all genres from fiction, doc-style series, infotainment formats to variety entertainment	Eligible: Producers residing in Germany and/or have offices here. 100% of funding must be spent in Berlin. Funding of up to 30% of the costs of a pilot. Four funding meetings scheduled each year.	www.medienboard.de	Christian Berg, c.berg@medienboard.de	August-Bebel-Str. 26-53 14482 Potsdam-Babelsberg Tel.: +49 (0)331-743 87 0
Filmförderung Hamburg Schleswig-Holstein	EUR 13 million	Full circle funding, focus on "nordic" content		www.ffhsh.de	Katrin Mersmann Skandinavien- Co-production, mersmann@ffhsh.de	Friedensallee 14-16 22765 Hamburg, +49 40 398 37 - 20, goede@ffhsh.de
Mitteldeutsche Medienförderung	EUR 15 million	Full circle funding		www.mdm-online.de		Hainstraße 17-19, 04109 Leipzig, Tel: +49 (0) 341-269 87 12, markus.goersch @mdm-online.de
Medien- und Filmgesellschaft Baden-Württemberg	EUR 15 million	Full circle funding		film.mfg.de		Breitscheidstr. 4, 70174 Stuttgart, Tel: +49 711/90715-300
Film & Medienbüro Niedersachsen/Nord Media GmbH	EUR 10 million	Full circle funding		www.nordmedia.de		Expo Plaza 1, 30539 Hannover, Tel.: +49 (0)511-123456-0, info@nordmedia.de

Appendix 5: German Producers

Top 10 German Producers		
Ranking	Company	Web address
1	UFA Group Potsdam-Babelsberg	www.ufa-fiction.de
2	Constantin Television GmbH, München	www.constantin-film.de
3	Studio Hamburg GmbH	www.studio-hamburg.de
4	Bavaria Fernsehproduktion GmbH, Geiselgasteig	www.bavaria-fernsehproduktion.de
5	ZDF Enterprises GmbH, Mainz	www.zdf-enterprises.de
6	brainpool TV GmbH, Köln	www.brainpool.de
7	All3Media Deutschland GmbH, München	www.all3media.de
8	Endemol Deutschland	www.endemol.de
9	ITV Studios Germany GmbH, Köln	www.itvstudios.de
10	ndF neue deutsche Filmgesellschaft mbH, München	www.ndf.de
Members of Produzenten-allianz (in alphabetical order)		
1	5ter Stock Medienproduktion GmbH, Stuttgart	www.5terstock.de
2	27 Kilometer Entertainment GmbH, Hamburg	www.27km.de
3	99pro media gmbh, Leipzig	www.99pro.de
4	a.pictures film & tv.production.gmbh, Hamburg	www.apictures.de
5	acht hamburg gmbh	www.acht-imaging.com
6	action concept, Hürth;	www.actionconcept.com
7	Akzente Film- und Fernsehproduktion GmbH, Unterföhring	www.akzentefilm.de
8	All3Media Deutschland GmbH, München	www.all3media.de
9	Almaro Film & TV Produktions- und Vertriebs GmbH, Geiselgasteig	www.satel.at
10	ANORAK Film GmbH, Berlin	www.anorakfilm.com
11	Ansager & Schnipselmann GmbH & Co KG, Düsseldorf	www.aunds.tv
12	ariane film gmbh, Leipzig	www.ariane-film.de
13	Ariane Krampe Filmproduktion GmbH, München	www.krampe-film.de
14	Aspekt Telefilm-Produktion GmbH, Hamburg	www.aspekt-telefilm.de
15	Autentic GmbH, Oberhaching	www.autentic.com
16	Bad Motel Movies GmbH, Potsdam-Babelsberg	www.badmotelmovies.com
17	Bakery Films Filmproduktion GmbH, Hamburg	www.bakeryfilms.com
18	Barefoot Films, Berlin	www.barefootfilms.de
19	Bavaria Entertainment GmbH, Hürth	www.bavaria-entertainment.de
20	Bavaria Fernsehproduktion GmbH, Geiselgasteig	www.bavaria-fernsehproduktion.de
21	Bavaria Film GmbH, Geiselgasteig	www.bavaria-film.de
22	Bavaria Filmproduktion GmbH, Geiselgasteig	www.bavaria-film.de
23	Bavaria Pictures GmbH, Geiselgasteig	www.bavaria-pictures.de
24	Beckground TV + Filmproduktion GmbH, Hamburg;	www.beckground.de
25	berlin producers Media GmbH, Berlin	www.berlin-producers.de
26	Beta Film GmbH, Oberhaching	www.betafilm.com
27	Bewegte Zeiten Filmproduktion GmbH, Wiesbaden; e	www.bewegtezeiten.d
28	BIGFISH Filmproduktion GmbH, Berlin	www.bigfish.de
29	Bilderfest GmbH, München;	www.bilderfest.de
30	Bildundtonfabrik btf GmbH, Köln	www.btf.de
31	blue eyes FICTION GmbH & Co. KG, München	www.blueeyes.de
32	brainpool TV GmbH, Köln	www.brainpool.de
33	Bremedia Produktion GmbH, Bremen	www.bremedia-produktion.de
34	brickbeach, Hamburg	www.brickbeach.de
35	BROADVIEW TV GmbH, Köln	www.broadview.tv
36	Bubbles Film GmbH, Hamburg	www.bubblesfilm.com
37	bumm film GmbH, München	www.bummfilm.de
38	Burda Studios Pictures GmbH, München	www.burda.studios.de
39	Caligari Film- und Fernsehproduktions GmbH, München	www.caligari.film
40	CCC Filmkunst GmbH, Berlin	www.ccc-film.de
41	Chamaeleon Digital Vision GmbH, Düsseldorf	www.chamaeleon-dv.de
42	Chimney Deutschland GmbH, Berlin	http://www.chimneygroup.com
43	Cinecentrum Berlin GmbH, Berlin	www.cinecentrum-berlin.de
44	Cinecentrum GmbH, Hamburg	www.cinecentrum.de
45	Claussen+Putz Filmproduktion GmbH, München	www.cp-film.com
46	CMP Creative Media Production, München	www.cmp.de

47	Cobblestone Filmproduktion GmbH, Hamburg	www.cobblestone.de
48	collina Filmproduktion GmbH, München	www.collinafilm.de
49	colourFIELD tell-a-vision GbR, Dortmund	www.colourfield.de
50	commlab GmbH, Leipzig	www.commlab.de
51	Constantin Entertainment GmbH, München	www.constantinentertainment.de
52	Constantin Film Produktion GmbH, München	www.constantin-film.de
53	Constantin Production Services, München	www.constantin-film.de
54	Constantin Television GmbH, München	www.constantin-film.de
55	Crazy Film GmbH, München	www.crazy-film.de
56	CURLYPICTURES GmbH & Co. KG, Hamburg	www.curlypictures.com
57	Czar Film GmbH, Hamburg	www.czar.de
58	Deli Creative Collective, Hamburg	www.deli.hamburg
59	Desert Flower Filmproduktion GmbH, München	www.desert-flower.de
60	deutschfilm GmbH, Berlin	www.deutschfilm.de
61	die film gmbh, München	www.diefilmgmbh.de
62	Digital Straik GmbH, Hamburg	www.straik.net
63	doc.station GmbH Medienproduktion, Hamburg	www.docstation.de
64	Dog Ear Films GmbH, Berlin	www.dogearfilms.com
65	doity Produktion GmbH, Berlin	www.doity.de
66	DOKfilm Fernsehproduktion GmbH, Potsdam	www.dokfilm.de
67	Dreambeliever Pictures Film Produktion GmbH, Geiseltal	www.dreambeliever.de
68	Dreamtool Entertainment GmbH & Co. KG, München	www.dreamtool.de
69	Drefa Media Holding GmbH / Kinderfilm GmbH, Erfurt	www.drefa.de
70	e+p films GmbH, Hamburg	www.ep-films.com
71	EASYdoesit GmbH, Berlin	www.easydoesit.de
72	ECO Media TV-Produktion, Hamburg	www.ecomediav.de
73	Eikon Media GmbH, Berlin	www.eikon-film.de
74	eitelsonnenschein GmbH, Köln	www.eitelsonnenschein.de
75	Element E Filmproduktion GmbH, Hamburg	www.element-e.net
76	Embassy of Dreams Filmproduktion GmbH, München	www.embassy.de
77	Erfttal Film- & Fernsehproduktion GmbH & Co. KG, Siegburg	www.erfttal-film.de
78	erste liebe filmproduktion GmbH, Hamburg	www.ersteliiebefilm.de
79	Europool GmbH, München	
80	Fandango Film TV Internet Produktions GmbH, Köln	www.fandangofilm.de
81	FFP New Media, Köln	www.ffpnewmedia.com
82	Film Deluxe GmbH, Berlin	www.filmdeluxe.com
83	Film House Germany AG, Frankfurt am Main	www.filmhousegermany.de
84	FILMREIF TV GmbH, Hamburg	www.filmreif-tv.de
85	five three double ninety filmproductions gmbh, Hamburg	www.539090.com
86	Fortune Cookie Film GmbH, Hamburg	www.fortunecookiefilm.com
87	FoxDevil Films GmbH, Berlin	www.foxdevilfilms.com
88	Freebird Pictures GmbH & Co. KG, München	www.freebirdpictures.de
89	G + K FILM Filmproduktions AG, Frankfurt am Main	www.gk-film.com
90	GAP DOC George Filmproduktion, Köln	www.gap-doc.com
91	gap films commercial productions gmbh, München	www.gapfilms.de
92	Glory Film GmbH, München	www.gloryfilm.de;
93	Goldkind Filmproduktion GmbH & Co. KG, München;	www.goldkindfilm.com
94	good friends Filmproduktions GmbH, Berlin	www.good-friends.tv
95	Good Times Fernsehproduktions-GmbH, Köln	www.good-times.de
96	Gruppe 5 Filmproduktion GmbH, Köln	www.gruppe5film.de
97	H & V Entertainment GmbH, München	www.hv-entertainment.com
98	hager moss film GmbH, München	www.hager-moss.de
99	HMG Hartmann Medien GmbH, Hamburg	www.hmgfilm.de
100	Honest Productions GmbH, Berlin	www.honest.international;
101	i&u Information und Unterhaltung TV Produktion GmbH & Co. KG, Köln	iutv.de
102	Iconoclast Germany GmbH, Berlin	www.iconoclast.tv
103	Imago TV Film- und Fernsehproduktion GmbH, Berlin	www.imago-tv.de
104	INFECTED Postproduction GmbH, Hamburg	www.infected-post.de
105	Interscience film GmbH, Heidelberg	www.intersciencefilm.de
106	Itep Pictures GmbH, Offenbach am Main	www.iteppictures.com
107	ITV Studios Germany GmbH, Köln	www.itvstudios.de;
108	Janus TV GmbH, Ismaning	www.janus-tv.de
109	Jo! Schmid Filmproduktion GmbH, Berlin	www.joschmid.com

110	JoJo Film- und Fernsehproduktion GmbH, Wiesbaden	http://www.jojo-tv.com/
111	Jooyaa Filmproduktion Berlin GmbH	www.jooyaa-film.com
112	Kimmig Entertainment GmbH, Oberkirch	www.kimmig-entertainment.de
113	Koberstein Film, Berlin	www.koberstein-film.de
114	Kordes & Kordes Film GmbH, Berlin	www.kordesfilm.de
115	Krebs & Krappen Film GmbH, Hamburg	www.krebs-krappen.de
116	Längengrad Filmproduktion GmbH, Köln	www.laengengrad.de
117	Latemar Film, Hamburg	latemar-film.com
118	Laterna Magica Filmproduktion GmbH, Frankfurt am Main	www.laternamagica.net
119	LAVAlabs Moving Images GmbH & Co KG, Düsseldorf	www.lavalabs.de
120	Lieblingsfilm GmbH, München	www.lieblingsfilm.biz
121	LIGA01 Computerfilm GmbH, München	www.liga01.com
122	Little Shark Entertainment GmbH, Köln	www.littleshark.de
123	Lupa Film GmbH, Berlin	www.lupa-film.com
124	M.A.R.K.13-STUDIOS GmbH & Co. KG, Stuttgart	www.mark13.com
125	m4e AG, Höhenkirchen-Siegertsbrunn	www.m4e.de
126	MA Motion Filmproduktions GmbH, Potsdam	www.ma-motion.com
127	Mackevision Medien Design GmbH, Stuttgart	www.mackevision.de
128	MACONDO MEDIEN FILMPRODUKTION GmbH, Mainz	www.macondo-medien.de
129	made in munich movies GmbH	www.madeinmunich.com
130	Magis TV GmbH, Berlin	www.magis.tv
131	Marco Polo Film AG, Heidelberg	www.marco-polo-film.de
132	Markenfilm GmbH & Co.KG, Wedel	www.markenfilm.de
133	Markenfilm Berlin GmbH	www.markenfilmberlin.de
134	Maz & More TV-Produktion GmbH, Berlin	www.mazandmore.de
135	mecom fiction GmbH, München	www.mecom-fiction.de
136	megahertz GmbH, Unterföhring	www.megahertz.org
137	Mixtvision Mediengesellschaft mbH, München	www.mixtvision.de
138	Molina Film GmbH & Co. KG, Köln	www.molinafilm.de
139	Moovie GmbH, Berlin	www.moovie.de
140	MotionWorks GmbH, Halle	www.motionworks.eu
141	Moviepool GmbH, München	www.moviepool.de
142	mypony GmbH, Hamburg	www.mypony.pro
143	Mythos Filmproduktions GmbH & Co. KG, Berlin	www.mythos-film.de
144	ndF neue deutsche Filmgesellschaft mbH, München	www.ndf.de
145	Network Movie Film- und Fernsehproduktion GmbH & Co. KG, Köln	www.networkmovie.de
146	NEUESUPER GmbH & Co. KG, München	http://www.neuesuper.de
147	NFP*, Berlin	www.nfp.de
148	NFP animation film GmbH, Wiesbaden	www.nfp.de
149	nhb studios Berlin GmbH	www.nhb.de
150	Niama-Film GmbH, Stuttgart	www.niama-film.de
151	Nordend Film GmbH, Hamburg	www.nordend-film.de
152	Novafilm Fernsehproduktion GmbH, Berlin	www.novafilm.de
153	oki films, München	www.oki.tv
154	Olga Film GmbH, München	www.olgafilm.de
155	Optix Hamburg	www.optixhamburg.de
156	Pantaleon Films GmbH, Frankfurt am Main	www.pantaleonfilms.com
157	Parasol Island GmbH, Düsseldorf	www.parasol-island.com
158	Partizan GmbH, Berlin	www.partizan.com
159	Pirates `n Paradise Berlin GmbH	www.pirates-www.de
160	Polyphon Film- und Fernsehgesellschaft mbH, Berlin	www.polyphon.de
161	Polyphon Pictures GmbH, Baden-Baden	www.polyphon-pictures.de
162	prime productions GmbH, Köln	www.prime-productions.de
163	ProSaar Medienproduktion GmbH, Saarbrücken	www.prosaar-medien.de
164	Provobis Film- und Fernseh GmbH, Berlin	www.provobis.de
165	RABBICORN FILMS GMBH, Hamburg	www.rabbicornfilms.com
166	Rekorder GmbH, Berlin	www.rekorder.de
167	Relevant Film Produktionsgesellschaft mbH, Hamburg	www.relevantfilm.de
168	REM Rapid Eye Movement Film- und Fernsehproduktions GmbH, München	www.rapideyemovement.de
169	REX Film Produktion GmbH, Wuppertal	www.rex-film.de
170	Riva Filmproduktion GmbH, Hamburg	www.rivafilm.de
171	Riverside Entertainment GmbH, Hamburg	www.riverside-entertainment.de
172	Rothkirch/Cartoon-Film GmbH, Berlin	www.cartoon-film.de

173	Roxy Film GmbH, München	www.roxyfilm.de
174	SamFilm GmbH, München	www.samfilm.de
175	Saubere Filme GmbH, Hamburg	www.sauberefilme.com
176	Saxonia Entertainment GmbH, Leipzig	www.saxonia-entertainment.de
177	Saxonia Media Filmproduktionsgesellschaft mbH, Leipzig	www.saxonia-media.de
178	ScanlineVFX GmbH, Geiselgasteig	www.scanlinevfx.com
179	SCHRAMM FILM Koerner & Weber, Berlin	www.schrammfilm.de
180	scopas medien AG, Frankfurt am Main	www.scopas.de
181	Securitel Film- und Fernsehproduktions- und Verlagsgesellschaft mbH, Ismaning	www.securitel.de
182	Sehsucht GmbH, Hamburg	www.sehsucht.de
183	Senator Film Produktion GmbH, Berlin	www.senator.de
184	SEO Entertainment GmbH, Unterföhring	www.seo-entertainment.de
185	Slaughterhouse GmbH, Hamburg	www.slgh.com
186	Sony Pictures Film und Fernseh Produktions GmbH, Hürth	www.sonypictures-tv.de
187	Soup Filmproduktion GmbH, Berlin	www.soup-film.de
188	SPIEGEL TV Infotainment GmbH, Hamburg	www.spiegelgruppe.de/...
189	SPIEGEL TV Media GmbH, Hamburg	www.spiegelgruppe.de/...
190	Sterntag Film GmbH, Hamburg	www.sterntag.com
191	Stink GmbH, Berlin	www.stink.co
192	Story House Productions GmbH, Berlin	www.storyhousepro.com
193	Studio 100 Media GmbH, München	www.studio100media.de
194	Studio Hamburg GmbH	www.studio-hamburg.de
195	Studio Hamburg Produktion Gruppe GmbH	www.studio-hamburg.de
196	Studio Hamburg Serienwerft GmbH	www.studio-hamburg.de
197	Studio.TV.Film GmbH, Berlin	www.studio-tv-film.de
198	STUDIOCANAL Film GmbH, Berlin	www.studiocanal.de
199	Süddeutsche TV GmbH, München	www.sueddeutsche-tv.de
200	taglicht media Film- & Fernsehproduktion GmbH, Köln	www.taglichtmedia.de
201	Talpa Germany GmbH & Co. KG, Hamburg;	www.talpa-germany.tv
202	Tangram International GmbH, München	www.tangram-film.de
203	tempomedia filmproduktion gmbh, Frankfurt am Main	www.tempomedia.de
204	The Marmalade Films GmbH & Co.KG, Hamburg	www.themarmalade.com
205	Tokee bros. Film- u. Fernsehproduktions GmbH, Essen	www.tokee.de
206	Tony Petersen Film GmbH, Hamburg	www.tpfilm.de
207	Tresor TV Produktions GmbH, Unterföhring	www.tresor.tv
208	trigger happy productions GmbH, Berlin	www.triggerhappyproductions.com
209	Trixter Berlin GmbH	www.trixter-commercial.de
210	Trixter Productions GmbH & Co. KG, München	www.trixter.de
211	True motion pictures GmbH, Berlin;	www.truemotionpictures.de
212	TV Plus GmbH, Hannover	www.tv-plus.de
213	TV60Filmproduktion GmbH, München	www.tv60film.de
214	U5 Filmproduktion GmbH & Co. KG, Frankfurt am Main	www.u5-filmproduktion.de
215	UFA Fiction GmbH, Potsdam-Babelsberg	www.ufa-fiction.de
216	UFA Show & Factual GmbH, Köln	www.ufa-showfactual.de
217	ume unique media entertainment GmbH, Köln	www.ume-gmbh.de
218	Universum Film GmbH, München	www.universum-film.de
219	VIAFILM GmbH & Co. KG, Grünwald	www.viafilm.de
220	Vincent TV GmbH, Hamburg	www.vincent-tv.de
221	Vogelsänger GmbH, Lage	www.vogelsaenger.tv
222	Wanda Germany GmbH, Hamburg	www.wanda.net
223	Warner Bros. Entertainment GmbH, Hamburg	www.warnerbros.de
224	Warner Bros. International Television Production Deutschland GmbH, Köln	www.wbitvp.com/deutschland
225	weareflink GmbH, Hamburg	www.weareflink.com
226	Wellenreiter TV GmbH, Köln	www.wellenreiter.tv
227	Wiedemann & Berg Filmproduktion GmbH & Co. KG, München	www.w-b-film.com
228	Wolff Brothers GmbH, München	www.wolff-brothers.de
229	Woodblock GmbH & Co. KG, Berlin	www.woodblock.tv
230	Wunderfilm GmbH, Hamburg	www.wunderfilm.de
231	WunderWerk GmbH, München	www.wunder-werk.de
232	WÜSTE FILM GmbH, Hamburg	www.wuestefilm.de
233	X Filme Creative Pool Entertainment GmbH, Berlin	www.x-filme.de
234	ZDF Digital Medienproduktion GmbH, Mainz	www.zdf-digital.com

235	ZDF Enterprises GmbH, Mainz	www.zdf-enterprises.de
236	Zeitsprung Pictures GmbH, Köln	www.zeitsprung.de
237	zero one film GmbH, Berlin	www.zeroone.de
238	Ziegler Film GmbH & Co. KG, Berlin	www.ziegler-film.com
239	Zieglerfilm Baden-Baden GmbH	www.zieglerfilm-bad.de
240	Zieglerfilm Köln GmbH	www.zieglerfilmkoeln.de
241	Zieglerfilm München GmbH	www.zieglerfilm-muenchen.de
242	Zum Goldenen Lamm Filmproduktion GmbH & Co. KG, Ludwigsburg	www.zum-goldenen-lamm.com

Appendix 6

Steps in finding a co-production partner or a client: practical tips

- Contact the Finnish supporting authorities:
 - **Audiovisual Finland:** introductions and signposting to German Screen Agencies
 - **Finnish Embassy in Berlin:** contact the embassy's trade commissioner
 - **Finnish Cultural Institute in Berlin:** a wide network of people and organizations in local cultural life and creative industries
 - **Export Finland, München:** governmental business advisory services.
- **Travel to markets, festivals and conferences:** Pursuit of international co-production requires travel. Book meetings in an event, make an agenda for them and take care of your contacts afterwards.
- **Develop existing relationships:** Focus on building relationships with previous German contacts. Given the time required and cost of building international relationships, a focused approach is likely to generate better results.
- **Speak to German Regional Screen Agencies:** There is always a contact point responsible for incoming producers. They can put you into contact with local funding bodies, production companies and will sometimes facilitate introductions to broadcasters.
- **Don't rush the relationship:** Get to know potential partners well before there even is a project to talk about. You need to research what a potential partner has produced and with whom and really get to know their business culture. How do they work and is it a similar style to how you work? Do they share your values? Spend time socially together over multiple markets. It might take years, finding the right project on which to work together. When approaching a buying client, make sure you are talking to the right person about the right offering.
- **Research stakeholders:** Get to know the buyers and funding agencies outlined in the appendix of this report. It is likely that broadcasters and funding agencies will try to match-make between foreign producers and their own producers, often because the local producers cannot afford the travel costs to these international markets.
- **Find the money first:** Research German funding opportunities, potential funding projects are regularly posted in great detail on the websites provided in the appendix. Then look for potential partners in Germany with the advice of the fund. A fund-first approach allows the producers to structure the project and the contracts to fit the financing during the development phase rather than trying to artificially change the structure of the deal once it has been agreed to. Do not be deterred by guidelines that do not contemplate digital media co-production as few do. Funding agencies may be open to being flexible with the guidelines to maximize their limited funds and increase the potential market for their producers.

ZDFE.drama Selection

Spring | Summer 2017



Highlight – Available



Maltese

Series / Crime + Suspense	8 x 50' or 4 x 90'

The Sirocco, a warm wind from the southeast, dries up the air and blows sand from the Sahara to the shores of the Italian island of Sicily, creating a dark cloud that makes it truly hard to breathe. Comparable to a dark cloud, Mafia lies over Sicily, over citizens, institutions, and everyday life curtailing the natural oxygenation of the civil society. Still, Mafia is perceived as a myth, a tale, a fictitious monster with head and limbs.

“Maltese” tells the story of one man fighting Mafia in the Seventies before it was universally recognized as one of the major diseases of Italy. The hypocrisy of a society that would rather remain deaf and blind to the extreme criminal danger that billows like dust in the wind around their heads is depicted through the protagonist’s point of view: Commissario Maltese, a detective with good will in an immoral world. His motions, his eyes and his feelings become ours. His gaze is our gaze. His need for the truth in a world that is shaped by corruption and lawlessness is our need for truth. Because, in the end, only the truth

will set us free – at least that is the only crucial point Maltese believes, even if this means he has to risk it all.

A murder is committed on Sicily. Commissario Maltese has to investigate in a complex system of fraud, terror and pain that sees assassins and criminals work alongside powerful and untouchable citizens, some being high-level politicians.

During his investigations, Maltese himself gets into the reticule. He is forced to risk his own life confronting assassins who have been sent to kill him. He is forced to see friends and associates dying and if this was not enough to take its toll on him, he is on the verge of losing the woman he desperately falls in love with.

At the end of the tunnel, a truth as painful as unexpected awaits him – unravelling the mystery from his past which had strongly affected him for as long as he can remember: his father’s death.

Produced by: Palomar for RAI
Cast: Kim Rossi Stuart, Rike Schmid a.o.

Highlight – Available



Before We Die

Series / Crime + Suspense

10 x 60' or 5 x 100'

Shot on location in Stockholm and starring Marie Richardson, each episode of "Before We Die" keeps the audience in suspense as the high tempo, flashbacks, cliff-hangers, and twists and turns leave viewers wanting more. The well-balanced plot combines a conventional crime story with the heart-rending tale of a broken family that belongs together.

The main character, Hanna, is a detective closing in on sixty and on the shortlist for early retirement. Though worn down by cares, she is a warm and complex woman. The audience is taken on a deep journey through moral dilemmas, relationships to cherish and betrayal to uncover. Its raw visual feel grabs attention and doesn't let go.

The story is ultimately about Hanna and her estrangement from her son. Christian has served time for drug possession after being turned in by his mother. When Hanna's close colleague and lover Sven is abducted, his role in the investigation of a notorious biker gang is revealed. Hanna finds out something that nobody else knows: Sven

has been handling an informant called Inez. What she doesn't know is that Inez is really Christian, who has infiltrated the gang.

As the plot unfolds and with their private relationship in tatters, the anonymous bond between handler and infiltrator grows stronger. For their own reasons, both Christian and Hanna are seeking to unravel the truth behind the kidnapping and an operation to take control of Stockholm's criminal underworld. For the first time in several years, mother and son have to cooperate and learn to trust each other, but at the same time commit acts that are far beyond their moral boundaries. Hanna must destroy another family to save her own.

The ten-part series owes a lot of its appeal to the distinctive nature of Nordic Noir. This Scandinavian crime fiction genre is typified by a realistic style with a dark and morally complex mood –precise, and stripped of unnecessary words. But there's much more to the drama "Before We Die" than darkness and an unspoken narrative ...

Produced by: B-Reel Films

Cast: Marie Richardson, Adam Pålsson, Alexej Manvelov a. o.

Available



Highway of Love (Chaussée d'Amour)

Series / Crime + Suspense

10 x 50'

The "Highway of Love" centers on the Chaussée d'Amour, an infamous Belgian thoroughfare lined with houses of ill repute. When Sylvia Carlier unexpectedly inherits one of these brothels following the untimely death of her father, she must make the best of a situation that seemingly can't get any worse.

Fleeing with her two children from a crumbling marriage, this suburban housewife is left with little choice but to master the world's oldest profession – or die trying. And just when Sylvia begins to accept her new role as Lady of the House, officer Ludo Beets comes knocking with a grim new development: a body has been unearthed beneath the highway, and all fingers point to foul play.

Murder, intrigue, and more than a little bit of loving all collide on the "Highway of Love", and when the dust clears, you won't believe who's left standing.

Produced by: deMENSEN

Cast: Tiny Bertels, Günther Lesage, Reinhilde Declair, René Fokker, Ruth Becquart, Naomi Veilssariou, Adrian Sack, Josse de Pauw, Jos Verbist, Dirk Roofthoof a.o.

Available



Anomalia

Series / Crime + Suspense

8 x 42'

In the eight-part series "Anomalia", neurosurgeon Valérie Rossier becomes aware that she has inherited the gift of healing powers from a legendary local witch. She gradually discovers that her past is inextricably bound up with the legend, and that her patients' illnesses are attributable to their past and ancestors. Can rectifying an error from the past influence the present? Do our lives contain elements of what has gone before?

Tormented characters and contrasting worlds create a spellbinding story that explores the themes of identity, faith and heritage. The Swiss rural snowscapes, so pure at first glance, hide enchanting, yet dark secrets. The series creates its own fascinating universe and introduces the audience to a mysterious place at the crossroads between science and faith, a place where the real and imaginary worlds converge.

Produced by: Point Prod and RTS

Cast: Natascha Régner, Didier Bezace, Raphael Roger Levy, Isabelle Caillat, Claude-Inga Barbey, Jean-Charles Simon, Patrick Lapp, Camille Figueroa, Baptiste Coustenoble a.o.

Available



Tempel

Series / Crime + Suspense	6 x 30'

In the tense six-part drama series "Tempel", Mark Tempel is on the ropes. He needs money to pay the rent and care for his wife, who is confined to a wheelchair after an accident. His adolescent daughter needs a strong father figure as a role model. He turns to people he had hoped never to see again, people he left behind in order to establish a family. Their sleazy boxing club has become a façade for an organisation that engages in drug dealing, extortion and prostitution.

It is a dark, immoral world that contrasts sharply with the one he is desperately seeking to preserve. The allure proves stronger than Mark's doubts. He enters into a deal that keeps his head above water for a few weeks, but ultimately exacts a very high price. This is the story of a double life torn between a family and the underworld, of light and shade, good and evil.

Produced by: Polyphon

Cast: Ken Duken, Chiara Schoras, Thomas Thieme, Aleksander Jovanovic, Michelle Barthel, Hiltrud Hauschke a.o.



Available



Solo Action for Nora Weiss

TV Movies / Crime + Suspense	2 x 90'

“Solo Action for Nora Weiss” spells danger for special investigator Nora Weiss. In the first episode of this two-parter, finding an escaped prisoner found guilty of murdering a teenage girl becomes personal when Nora’s god-daughter disappears. In the follow-up, the owner of a bus company is found murdered outside Nora’s apartment. Was he involved in murkier matters? Are the crimes connected? And what is the role of Nora’s boss in all of this? Against the Lübeck cityscape, Nora Weiss grittily unpacks the truth.

Produced by: Network Movie Hamburg

Cast: Anna Maria Mühle, Jan Krauter, Rainer Bock, Peter Jordan, Philipp Hochmair, Steffi Kühnert, Bernhard Schütz, Natalia Rudziewicz a.o.

New Movie Available



The Trace – Death Wish

TV Movies / Crime + Suspense	1 x 90'
	in total 3 x 90'

As her murdered father is being discovered, the blood-splattered teenager Sina turns to the family of her friend Charlotte for help. Despite the obvious suspicion, Charlotte’s father Joe, a psychiatrist, cannot believe that Sina was the killer. He joins the detective Ruiz to investigate a drama teacher whose students include the two girls. But what is the link between his murky past and the murder of Sina’s father? Or was the intended victim someone else? Death Wish is the latest thriller in the series “The Trace – Death Wish”.

Produced by: Network Movie Hamburg

Cast: Ulrich Noethen, Juergen Maurer, Petra van de Voort, Lilly Liefers, Mala Emde, Fritz Karl, Friederike Becht, Michaela Rosen, Marie Leuenberger, Annika Schrumpf, Kailas Mahadevan a.o.

New Movies Available



Helen Dorn

TV Movies / Crime + Suspense	8 x 90'

Helen Dorn is a tough, uncompromising police inspector with a vulnerable, soft centre. In the three latest episodes of this detective series, the maternal side of her character comes to the fore. In “Merciless” she has the task of keeping an imperious judge and his young family safe when serious threats are made against him. But could he be hiding a secret?

In “Lost Girls”, the inspector takes an interest in two sisters who are living in care. When Mila’s abusive guardian is found dead, she is the obvious suspect – until the focus shifts to a drug cartel.

And while investigating her most recent case in “The Untruthful Witness”, Helen Dorn takes a young witness under her wing while operating as a lone wolf against the criminal underworld of child trafficking and prostitution.

For intensity and portrayals of courage, this is an eminently watchable series.

Produced by: Network Movie Cologne

Cast: Anna Loos, Ernst Stötzner, Daniel Friedrich, Tristan Seith a.o.



Rating:

- Reached the outstanding rating of over 7 mio viewers
- Market share: between 18 and 25 percent

New Movies Available



Murder Mysteries — The Living and the Dead

TV Movies /Crime + Suspense	2 x 90'
	in total 9 x 90'

Detective story or crime thriller? The two-parter in the TV crime series "Murder Mysteries — The Living and the Dead" by Nele Neuhaus stands out from the crowd of whodunits. Viewers are drawn into the world of the killer while the detectives are still groping in the dark. The three deaths at the hands of a sniper initially appear to have nothing in common, but a tangled thread of connections to a stroke victim is gradually unravelled by the police with the aid of a psychological profiler.

Encountering a complex web of guilt and revenge triggered by the killer's tragic loss of his wife and daughter, they ultimately uncover a medical scandal that leads to the sniper. The film illuminates the troubled mind of a man who takes the law into his own hands, and provides insights into into the painstaking and fraught work of the investigators. A crime thriller par excellence.

Produced by: all-in-Production

Cast: Tim Bergmann, Felicitas Woll, Michael Schenk, Kai Scheve, Sybille J. Schedwill, Simon Schwarz, Ulrich Tukur, Tanja Wedhorn, Johanna Gastdorf a. o.

**Rating:**

- Reached the outstanding rating of over 7 mio viewers
- Market share: between 17 and 21 percent

Available



A Man under Suspicion

TV Movies /Crime + Suspense	1 x 90'

Anja disappears after her 40th birthday party and her husband Thomas becomes the prime suspect. The police have very few clues and there is no body. Despite the efforts of his attractive lawyer, Lavinia, Thomas is arrested on suspicion of murder when his father-in-law makes incriminating claims against his detested son-in-law. But Anja's father is not free from suspicion either, having been accused of her abuse. Just who can be trusted?

Beneath Lavinia's ice-cold exterior, questions arise as to the nature of her earlier friendship with both Anja and Thomas, with hints at a love triangle. Then Anja is reported to have been sighted in Spain ...

In a plot full of twists and turns, we are kept guessing to the end, when the dramatic denouement in court takes everyone by surprise.

Produced by: die film GmbH

Cast: Mark Waschke, Petra Schmidt-Schaller, Deborah Kaufmann, Peter Kurth, Annika Kuhl, Hanns Zischler, Aljoscha Lange, Sophie Lutz, Ronald Kukulies a. o.

New Movie Available



Schwarzach 23

TV Movies / Crime + Suspense	2 x 90'

With every member of Inspector Franz Germinger's family on the case, the audience can expect both wry comedy and a whodunit in "Pointing Fingers", the second episode in the light-hearted detective series "Schwarzach 23". A corpse, a radical right-wing taxi driver, the victim's wacky daughter and two undercover agents sustain the suspense and keep the detective on his toes. His parents have something to hide, but he is determined to find out who met the victim on the morning of his murder.

Produced by: TV60 FILMPRODUKTION

Cast: Maximilian Brückner, Friedrich von Thun, Marlene Morreis, Gundi Ellert, Jockel Tschiersch, Leslie Malton, Shenja Lacher a.o.

New Movie Available



Chiemsee Mystery

TV Movies / Crime + Suspense	2 x 90'

In the second film of the "Chiemsee Mystery" detective series set on the shores of Lake Chiemsee in Bavaria, Detective Hattinger falls for the enigmatic secretary of the murder victim, Joe Kammler. The estate agent was under suspicion of engaging in dubious business practices. As the personal relationships of the investigators are revealed, the story becomes a universal tale of loneliness, lost hope and local identity. When Kammler's sister is found dead, it becomes clear that Hattinger has been playing with fire.

Produced by: Network Movie Hamburg

Cast: Michael Fitz, Jessica Schwarz, Bettina Mittendorfer, Golo Euler, Gerhard Wittmann, Hanna Plaß, Anna Maria Sturm, David Zimmerschied a.o.

New Episodes Available



The Rosenheim Cops

Series / Crime + Suspense	27 x 45'
	in total 388 x 45'

The light-hearted, family-friendly detective series is set in the rural idyll of southern Bavaria. In the quiet town of Rosenheim, in the midst of the picturesque scenery of the Alps, there is one little exception that makes the police investigation somewhat different from the rest of the world.

Everyone knows one another, and the characters involved are not merely victims, culprits and police officers – above all, they are human beings. The series revolves around two detective superintendents whose characters could not be more different. Oddly enough, despite their diversity, together they are a highly effective investigating team. When it comes to solving crimes our two cops are unbeatable – even if they are sometimes forced to use unconventional methods: special circumstances require special measures.

Produced by: Bavaria Film

Cast: Joseph Hanneschläger, Igor Jeftic, Marisa Burger, Max Müller, Karin Thaler a.o.

Available



Marie is on Fire

TV Movies / Love + Romance

2 x 90'

“Marie is on Fire” is a family entertainment series centred around a volunteer fire brigade in picture-book Bavaria. The series opener, “For ever and ever”, starts with an eve-of-wedding party that is interrupted when the revellers have to attend a fire endangering the lives of the future spouses’ sons. In the second episode, “It’s hard to be a father”, Marie has joined the fire brigade to ensure its survival in the absence of male volunteers. Although briefed to watch and learn, she steps forward to rescue the terrified young Sophie from the roof of the family home.

Marie’s act of bravery is the prelude to her building relationships in both Sophie’s and her own disjointed family. The series tells the heart-warming story of a single parent who believes in holding on to the good things in life, even if it entails pushing the boundaries.

Produced by: Wiedemann & Berg Television

Cast: Christine Eichenberger, Stefan Murr, Wolfgang Fierek, Saskia Vester, Katharina Müller-Elmau, Sylta Fee Wegmann, Moritz Regenauer, Jonas Holdenrieder a. o.

New Episodes Available



Alpine Rescue

TV Movies / Family

6 x 90'

in total 50 x 90'

“Alpine Rescue” is a drama series about a fictional mountain rescue team, set against the mighty Dachstein massif in Austria. Now in its eighth season, the series follows the professional and private lives of the team, currently led by Markus Kofler, with each episode featuring a spectacular rescue.

The six exciting new stories are richly varied as the team averts impending catastrophes, often in a race against time. They come to the aid of young and inexperienced outdoor enthusiasts, and sometimes take the law into their own hands. Faced with foolishness, arrogance and humility, the rescuers need courage, speed of thought, and utter dedication to their mission. A sterling cast and action-packed, gripping tales make each episode unmissable. As relationships and intrigues unfold in each storyline, the stunning backdrop can never be overlooked.

Produced by: ndf

Cast: Martin Gruber, Markus Brandl, Paula Paul, Martin Klempnow, Robert Lohr, Stefanie von Poser, Heinz Marecek, Michael König, Susan Hoecke a. o.



Rating:

- Reached the outstanding rating of over 5 mio viewers
- Market share: up to 17 percent

Available



No Talent for Love

TV Movies / Love + Romance	1 x 90'

In the comedy “No talent for love”, Eva enjoys a life of luxury – and shoes galore – alongside her millionaire husband, Rainer. But when embarrassed by his wife’s faux pas at a charity event, Rainer wants a divorce. Eva’s shock is compounded when she learns from Pepe, a divorce lawyer and mutual friend, that she has no claim to a settlement because of a prenuptial agreement. She enlists the help of a young couple to feign a kidnapping and secure a share of what she believes is hers by right.

Produced by: Hager Moss Film
Cast: Lisa Martinek, Thomas Heinze, Peter Jordan a. o.

Coming Soon



Queens of Trouble

TV Movies / Love + Romance	2 x 90'

Self-deprecation and vitality are the hallmarks of this romcom series based on Kerstin Gier’s best-sellers. The principal characters are women plagued by self-doubt, who founder as they struggle to make sense of the world. The latest episodes highlighting the frenzy that drives people’s lives are “Sad to say the bride says no”, which takes a sideways look at wedding arrangements, and “Many solutions, many problems”, which explores the difficulties of rebuilding relationships that have been shattered by some home truths.

Produced by: U5 Filmproduktion, Producers at Work
Cast: Katharina Wackernagel, Inez Bjørg David, Janek Rieke, Roman Knižka, Bernd Christian Althoff, Eleonore Weisgerber a. o.

Available



Speaking of Luck

TV Movies / Love + Romance	1 x 90'

“Speaking of Luck” takes a humorous look at happy – and unhappy – relationships. Three seemingly contented couples are each unexpectedly forced to face the uncomfortable reality of broken communications and divergent aspirations. When the main protagonist learns of her husband’s infidelity, chaos ensues, but support and merriment are assured as her girlfriends rally round. In a perfectly-paced romcom peopled by credible mid-lifers, the couples re-examine their marriages with heart-warming results.

Produced by: Relevant Film
Cast: Janna Striebeck, Martin Lindow, Katharina Müller-Elmou, Peter Jordan, Karoline Eichhorn a. o.

New Movies Available



A Summer in ...

TV Movies / Love + Romance	2 x 90'
	in total 22 x 90'

Summer is the season for dreaming in the sun and embarking on adventures. In the series “A Summer in ...” it’s also the time to visit exotic destinations and embrace unfamiliar regions and cultures. These are stories of strong-willed women set against the backdrop of romantic cities and gorgeous landscapes. Women whose lives can change completely in the course of one summer. Two new episodes set in the south of France and Denmark are love stories built around an inheritance and the search for a lost father.

Produced by: UFA Fiction
Cast: various

Available



Siegfried Lenz Movies

TV Movies / Drama	3 x 90'

Siegfried Lenz was a German writer and one of the most distinctive storytellers in German post-war literature. As a part of his outstanding work, a novel, a novella and a short story have been adapted for TV audiences.

The production "Minute of Silence" is the tale of a teenager's summer romance with his young teacher and his anguish in recalling how the affair ended in tragedy.

In "High Tide Is Dead On Time" we are on a North Sea island, portrayed by atmospheric camerawork, where the part-time female police officer has to decide whether an unexplained death resulted from an accident, suicide or murder.

Shot in soft twilight hues, "The Loss" explores the torment of a stroke victim as he seeks, without the power of speech, to explain his true feelings for the two women he loves.

Produced by: Network Movie Hamburg

Cast: various

Available



The Glassblower

TV Movies / Drama	1 x 90'

An inspiring period drama set at the dawn of the 1900s, "The Glassblower" is an atmospheric tale of emancipation and love told against the background of the foreboding Thuringian Forest. As women, the two sisters Johanna and Marie are barred from continuing their father's glassblowing trade upon his untimely death. Sustaining their hopes of following in his footsteps, at first they go their separate ways in order to learn their craft and put food on the table, but each encounters the brutality of an industry and society dominated by men.

Taking charge of their own destinies, they ultimately seek and achieve emancipation and the right to resurrect their father's workshop. Like mulled wine at a Christmas market, this is a bitter-sweet, warming story. The film is beautifully shot, sensitively directed and illuminated by truly memorable performances.

Produced by: Bavaria Fernsehproduktion

Cast: Luise Heyer, Maria Ehrich, Robert Gwisdek, Diek Borchardt, Max Hopp, Franz Dinda, Ute Willing, Johanna Bittenbinder



Rating:

- Reached the outstanding rating of over 5 mio viewers
- Market share: 15.5 percent

Selection Spring | Summer 2017

ZDF.enterprises



ZDF Enterprises GmbH | Erich-Dombrowski-Str. 1 | 55127 Mainz | Germany
T: +49 (0) 6131-991 1811 | zdf.drama@zdf-enterprises.de | www.zdf-enterprises.de

ZDFE.drama



**AUDIOVISUAL
FINLAND**