



CHAPTER

6 Media Ownership and Concentration in Germany

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Abstract

This chapter looks at media ownership and concentration in Germany. Once it has given an overview of the German media landscape, the chapter focuses on print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, broadcast television, multichannel TV platforms, video portals, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines, online news market, Internet portals). The central players in German audiovisual media are the dozen public service broadcast institutions, organized in ARD and ZDF. Policy is set by the Länder audiovisual regulatory organizations dominated by the large political parties. Several large print publishers have established a major role in television, such as Bertelsmann (RTL) and Axel Springer (ProSiebenSat1). Agreements between all Länder has created the basics of a dual public–private system of broadcasting. The system includes regulation for media concentration, stating that no single company can control more than 30% of all TV audiences. In telecom, the major players are Deutsche Telekom, Vodafone, and Telefonica. Other major print publishers are Burda, Bauer, and Holtzbrinck.

Keywords: [German media market](#), [print media](#), [public broadcasting sector](#), [telecommunications](#), [Internet](#), [Länder organizations](#), [media policy](#), [Bauer](#), [Bertelsmann](#), [Burda](#), [Springer](#), [Deutsche Telekom](#), [Vodafone](#), [Telefonica](#) [German media market](#), [print media](#), [public broadcasting sector](#), [telecommunications](#), [Internet](#), [Länder organizations](#), [media policy](#), [Bauer](#), [Bertelsmann](#), [Burda](#), [Springer](#), [Deutsche Telekom](#), [Vodafone](#), [Telefonica](#)

Subject: [Economic Sociology](#), [Social Research and Statistics](#)

Introduction

With a population of about 82.2 million people and 35 million households owning at least one TV set, Germany is one of the largest media markets in Europe. When the German–language markets in Switzerland and Austria are included, about 100 million people consume German media products. It is the largest single language space inside the European Union.

Germany has a long history of mass media; several of the world’s first newspapers began printing some 400 years ago. However, during the Third Reich (1933–1945), mass media became a tool of the Nazi dictatorship, and subsequently the media experienced a complete reset under the occupying Allied powers. The postwar media system that developed in the zones under French, British, and American control was based on the principle of freedom of the press as stipulated by the Basic Law of 1949.

Until 1990, Germany was a divided country. State and commercial media producers operated freely in the western zones that eventually became the Federal Republic of Germany (FRG) or “West Germany.” The media system in the Soviet–administered zone, which was reorganized as the German Democratic Republic (GDR), was highly centralized and operated under the control of the Socialist Unity (Communist) Party. This

media system was dismantled during the process of reunification in the 1990s, but patterns of media usage still differ between East and West. The major media production centers are still located within the old West German borders, most eastern newspapers are owned by western firms, and regional broadcasting has been integrated into the ↪ system of public and commercial broadcasting developed in West Germany.¹

Germany has a dual system: in public broadcasting the Länder (states) have a strong role. The Federal Constitution stipulates that the sole responsibility for broadcasting rests with the Länder as part of their cultural sovereignty. As a result, public service broadcasters are created by the Länder and act individually or jointly by treaty agreements among themselves. The exception is the broadcaster Deutsche Welle, which has a federal mandate to provide electronic media services to foreign audiences.

A basic agreement (Rundfunkstaatsvertrag) of all the Länder defines the public and private broadcasting industries. All broadcasting corporations are governed by an independent Broadcasting Council (Rundfunkrat), whose representatives are supposed to reflect the “socially relevant groups” of society, according to a Federal Constitutional Court’s ruling; in addition, these broadcasters also have supervisory councils assigned to them.² With the advent of commercial broadcasting, all Länder in West Germany drafted new media laws in the 1980s. These laws specifically regulate electronic media outside of the conventional public corporations by handing out commercial radio and TV licenses and deciding what programs may be fed into the cable network. For this purpose, new state supervisory bodies (Landesmedienanstalten) were created, each with a council resembling those of the public broadcasters. There were 14 Landesmedienanstalten as of 2009. Because of Germany’s strong federalist system, some TV and most radio broadcasters are regional or even local.³

The local and regional newspapers market is strong in Germany and is characterized by a large number of outlets. In 2008, there were 135 independent editorial units, full publishing entities that produce all parts of daily newspapers, and 354 editorial units for weekly newspapers. Including local editions, there are 1,512 newspapers in circulation in Germany. In 2008, total newspaper circulation stood at 20.2 million, most of which is subscription based as opposed to newsstand sales; 95% of the subscription-based press claims to be local, with a circulation of 14.3 million. There are only a small number of national newspapers, and even most of those have a strong regional base: *Bild Zeitung*, *Süddeutsche Zeitung (SZ)*, *Frankfurter Allgemeine Zeitung (FAZ)*, *Die Welt*, *Frankfurter Rundschau (FR)*, and *Tageszeitung (Taz)*. In terms of circulation figures, the national newspapers account for approximately 1.7 million daily copies. Another 4.5 million copies are sold in newsstands. The highest-circulation German tabloid paper is *Bild Zeitung*; with a circulation of 3.3 million, it is the top selling paper in the European Union. The most successful and important weekly is *Die Zeit*, with a weekly circulation of 525,000 copies.⁴

The German print press is characterized by a high, albeit decreasing, dependency on advertising income and demonstrates a significant degree of concentration. Despite the profusion of titles, the newspaper market is dominated by a small number of publishers.

The German magazine sector is extremely robust with some 906 general magazines with an annual circulation of 118 million copies and 1,218 specialized periodicals with an annual circulation of 13.6 million. *Der Spiegel* is a weekly news magazine, modeled after the American *Time*, and for long time it held a virtual monopoly in its market with an annual circulation of approximately 1.1 million. With its investigative style of journalism, it is the most influential political publication in Germany.

There are eight relevant news wire agencies. The dominant internationally-active agency is ↪ Deutsche Presseagentur (DPA). Because nearly all newspapers subscribe to DPA, it can be regarded as the primary source of news. Other news agencies are complementary sources. Its business model was questioned in 2009 when the biggest regional newspaper, *Westdeutsche Allgemeine Zeitung (WAZ)*, canceled its DPA subscription. Other press companies are considering a similar course of action. The Associated Press (AP), Reuters Germany, and Agence France Presse (AFP) rank second, third, and fourth place in the German market, respectively.⁵

Radio is a popular medium in Germany. In 2008, every German citizen listened to 176 minutes every day. Slightly more than a half of these minutes are spent listening to public service broadcasters. They usually offer six regional programs that concentrate on general audiences, as well as special target groups such as culture, news, and youth. In addition, there are two national radio programs based in Berlin (Deutschlandradio Kultur) and Cologne (Deutschlandfunk) with public funding secured by another Länder-level agreement.

Commercial radio is licensed in all Länder; therefore it follows mostly a regional pattern. There are no national broadcasters, but some are active in several Länder, such as NRJ and Klassik Radio. In two southern Länder, local commercial radio is the only option for listeners. In North Rhine-Westphalia, the largest state, 46 local stations have commercial programming but offer local, noncommercial windows of time as well. Noncommercial radio exists in each state. Every state has its own regulations. Some states allow community stations, while others prefer public access, educational stations, campus stations, and so forth. This is also true of television. One Land has no activities at all.⁶

Germans spend about 219 minutes per day watching television, split evenly between public and commercial programs. All regional public broadcasters jointly founded the ARD (Arbeitsgemeinschaft der Rundfunkanstalten Deutschlands) regulatory body, and they contribute financial contributions according to their size to the nationwide TV channel Das Erste, the first and oldest TV program. In addition, they independently organize a regional program (III Programme) that offers regional content, as well as cultural and educational programming.

The Second German Television ZDF (Zweites Deutsches Fernsehen) is based on an agreement of all Länder (ZDF-Staatsvertrag) and is located in Mainz. ARD and ZDF jointly offer a number of specialized programs: Arte (together with France), 3Sat (together with Austria and Switzerland), Kika (for children), and Phoenix (events and documentation).

Today German commercial television is controlled by two media groups that are collectively called Senderfamilien (broadcaster families). One, formerly owned by Leo Kirch, is ProSiebenSat.1 Media AG and consists of the channels Sat.1, ProSieben, N24, Kabel 1, 9live, and others. In 2006, it was acquired by the Anglo-American investment funds Permira and Kohlberg, Kravis & Co. (KKR). It took over the SBS activities of these funds in ten other European countries.

The other is controlled by the German giant Bertelsmann, the largest media company outside of the United States, the largest bookseller in the world, and a global player. RTL Group S.A. owns TV channels in a dozen European countries. In Germany, these include RTL, RTL II, Super RTL, VOX, and N-TV. More programs were introduced in 2009. Some of them are independently owned special interest channels, while others are subsidiaries of international conglomerates such as Viacom, Disney, and NBC Universal. In large cities such as Berlin and Hamburg, regional commercial TV has been established. Over half of German households have cable. A smaller percentage have satellite TV, and a still smaller percentage of households have only terrestrial reception.

p. 110 The only pay-TV company, Premiere, founded by Leo Kirch, went bankrupt. It was taken over by Rupert Murdoch in 2009, renamed Sky, and integrated into Murdoch's European Sky conglomerate. Compared to other European countries, pay TV is not very successful due to the large number of freely accessible channels. In 2009, about 2.4 million viewers subscribed to Sky.⁷

The regulatory body for all matters of telecom, including the non-mass media side of online services, is the Federal Network Agency (Bundesnetzagentur). The largest company in this field is Deutsche Telekom, formerly the state administration for telephony and still partly owned by the federal government. It has entered the market of Internet TV, but so far the resonance is limited: its subsidiary T-Home entertain provided IPTV for about 700,000 subscribers in 2009.⁸

The accountability system for the press was created by the German Press Council (Deutscher Presserat) in 1956. It consists of an equal number of representatives from the journalist and publisher organizations for a total of 20. Members of the general public may appeal directly to the Council. If the Council supports the complaint, the respective newspaper is expected to publish the Council's ruling. The decisions are published on the basis of a Press Codex that is regularly renewed according to recent journalism developments. The effect of this self-regulation is limited, especially in relation to the practices of the yellow press.

The German Advertisement Council (Deutscher Werberat) is a similar organization, consisting of 10 to 12 representatives from the media and advertising agencies. They publish their decisions on complaints in a handbook. Complaints against the public service broadcasters may be brought to the members of the Broadcast Councils. In commercial broadcasting, all television companies are obliged to employ a Commissioner for Youth Protection (Jugendschutzbeauftragter) that reports only to the company. Some media outlets, especially newspapers, have special media sections that provide more transparency for audiences, although they do not criticize the media industry. Journalist organizations such as Netzwerk

Recherche (Network for Investigative Journalism) are trying to improve the quality of journalism through more extensive critiques of the industry.⁹

This chapter provides a deeper analysis of the ownership and concentration levels in print, audiovisual, telecom distribution, and online media.

Introduction

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Print Media

Newspapers

The newspaper market in Germany can be divided into two categories: those mainly sold via subscription and those mainly sold via retail. Readers spend on average of 40 minutes per day reading newspapers sold via subscription and only 20 minutes with those sold via retail; 95% of all newspapers in Germany are sold via subscription.¹⁰ In 2008, Stuttgarter Zeitung acquired the *Süddeutsche Zeitung*, the eighth largest German newspaper with a daily print run of 430,000.¹¹ This acquisition made Stuttgarter Zeitung the second largest newspaper publisher and the largest publisher of newspapers sold via subscription. This caused the highest increase of concentration since 1989. Axel Springer AG is the largest German newspaper publisher. It is ranked third in the market of subscription newspapers but dominates the retail newspaper market with a market share of 80%.

p. 111 There are several other prominent newspaper publishers in the market. The privately held WAZ publishing group is the third largest German newspaper publisher and structured similarly to the Stuttgarter Zeitung publishing group with a strong focus on subscription newspapers. DuMont is number four in the German market. While having lost its importance in the subscription market, DuMont is still the third largest publisher for newspapers sold via retail. Ippen publishing group is the fifth largest newspaper publisher and is active in both segments.

Our dataset contains concentration measures from 1989 to 2012. The concentration has been measured by print run per year. From 2006 to 2008, we could observe the largest increase of market concentration in our dataset. In 1989, the market share of the top four players equaled 39.6% while in 2008 it was 40.8%. The market share of the ten largest players grew from 54.8% to 58.5% in the same period.

When looking at the concentration indices, we can observe that HHI and Noam index grow consistently over time. C4 also increased due to acquisition activities. We see differences in the indices between the two

newspaper markets. In the subscription market, all three indices increased after 1989. This is driven by the acquisitions during this time period. In 2012, the market share of the five largest players was 33.9%. At first glance, the market for newspapers sold via retail looks different. The market share of the top five groups dropped from 39% in 2000 to 37.4% in 2006 because of Mecom's entry into the German market. In 2005, Mecom acquired some newspapers with its German subsidiary company, BV deutsche Vertragsholding, and became one of the ten largest newspaper publishers for newspapers sold via retail. However, when looking at this market it is more important to focus on the absolute numbers and less on the trends (Table 6.1).

Table 6-1. Market Shares in the German Newspaper Market

| | 1989 | 1993 | 1997 | 2000 | 2004 | 2006 | 2008 | 2012 |
|---|-------|-------|-------|-------|-------|-------|---------------------|-------|
| Axel Springer AG | 26.7 | 22.8 | 23.7 | 23.6 | 22.7 | 22.5 | 22.1 | 18.8 |
| Stuttgarter Zeitung | 3.2 | 5.2 | 5.0 | 5.0 | 5.0 | 5.2 | 8.5 | 9.2 |
| Süddeutsche Zeitung | 3.6 | 3.3 | 3.2 | 3.3 | 2.5 | 2.6 | Stuttgarter Zeitung | - |
| Westdeutsche Allgemeine Zeitung (WAZ) (Funke) | 6.0 | 5.6 | 5.9 | 6.0 | 6.0 | 5.6 | 6.0 | 5.7 |
| DuMont Schauberg | 3.3 | 4.5 | 4.0 | 4.4 | 4.0 | 3.9 | 4.2 | 5.5 |
| Ippen-Gruppe | 3.0 | 2.7 | 2.7 | 2.9 | 3.9 | 4.1 | 4.0 | 4.2 |
| Holtzbrinck | | 2.5 | 2.5 | 2.5 | 3.6 | 3.7 | 3.8 | - |
| Frankfurter Allgemeine Zeitung (FAZ) | 2.4 | 3.1 | 3.0 | 3.0 | 3.1 | 3.0 | 3.0 | 2.5 |
| Madsack | 1.9 | 2.1 | 2.3 | 2.4 | 2.5 | 2.5 | 2.5 | 4.9 |
| DDVG | | | | | | 2.2 | 2.4 | 3.1 |
| (Bertelsmann, Gruner + Jahr) | | 3.8 | 3.4 | 2.8 | 2.8 | | | - |
| BV dt. Zeitungsholding | | | | | | | 2.0 | |
| Others | 49.9 | 44.4 | 44.3 | 44.1 | 43.9 | 44.7 | 41.5 | 46.1 |
| Revenue (\$US mln) | | | | | 4,163 | | 4,346 | |
| C4 | 39.6 | 38.1 | 38.6 | 39.0 | 37.7 | 37.4 | 40.8 | 39.2 |
| HHI | 801.4 | 651.4 | 687.1 | 685.5 | 650.4 | 637.2 | 669.8 | 558.3 |
| N (>1%) | 8 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Noam | 283.3 | 206.0 | 217.3 | 216.8 | 205.7 | 201.5 | 211.8 | 197.4 |

Source: Röper (2002, 2004, 2008)

p. 112 Book Publishing

With 9 billion € (US \$10.8 billion) in revenues, 800 million books, and about 90,000 new titles per year, Germany is the third largest book market in the world.¹² In Germany, as in other European countries, there is a retail price control that forces each publisher to set a fixed price for each title by law. Looking at the different sales channels, we can observe that retail book trade is quite dominant with a market share of 53.6% in 2007; 18% of revenues are generated via direct sale.¹³

Market shares were measured based on the revenues of the top 100 publishers in each year. The figures were taken from the Buchreport Verlagsranking. These 100 publishers were then grouped together by company. Total revenues of the industry were taken from the reports of the German Book Trades Association.¹⁴

The findings are reported in Table 6.2. In 2007 the three largest book publishers were Springer Science + Business, Klett, and Cornelsen. (Klett offers education books for students and Cornelsen operates in the general education area.)

Table 6-2. Development of Revenues of the Largest (Rank 1–100) Book Publishers (€M)

| Year | Rank 1 | Rank 10 | Rank 25 | Rank 50 | Rank 100 |
|------|--------|---------|---------|---------|----------|
| 2007 | 601 | 150 | 62 | 31 | 7 |
| 2006 | 641 | 164 | 60 | 10 | 7 |
| 2005 | 588 | 144 | 60 | 29 | 7 |
| 2004 | 544 | 185 | 61 | 30 | 7 |
| 2003 | 530 | 161 | 61 | 31 | 6 |
| 2000 | 597 | 135 | 61 | 38 | 7 |
| 1995 | 505 | 83 | 48 | 28 | 9 |
| 1990 | 931 | 56 | 39 | 23 | 7 |

Source: *Buchreport.de*. (2008)

Among publishers that focus on paperback books, Random House (Bertelsmann) was the largest publisher in 2004, followed by Holtzbrinck and Bonnier of Sweden.¹⁵ Holtzbrinck was restructured in 2009 when long-time CEO and 33% shareholder Dieter von Holtzbrinck sold his shares to his siblings and subsequently acquired a stake in Holtzbrinck Group properties such as *Handelsblatt* and *Zeit*.

In general, there is much change within the top group, as this segment is drastically dependent on best sellers. For example, Carlsen was among the top publishers during the years in which the Harry Potter books were released.

The book market in Germany consolidated after 1989. Many small publishers were merged and sold. At the same time, some of the bigger publishers sold the smaller publishers that they just had acquired a short time before. One example is Axel Springer. Only three years after buying into the book market, Springer sold the book publishers it had acquired. Bertelsmann decided to buy all of Springer's book publishers, but the German antitrust agency intervened and Bertelsmann had to divest parts of the acquisition to Bonnier. Bertelsmann also bought, in 1999, the largest book publisher in Germany, Springer Science, and sold it in 2003 to British private equity investors.

Publishers have expanded their business into a broad range of information and entertainment services, but the structure of the industry is mid-size oriented. The ownership structures are almost constant. Table 6.2 shows publishers' revenues, ranked from 1 to 100 according to revenues from 1990 to 2007.

After 2000, concentration remained constant (Table 6.3). In contrast to the preceding years, the indices remain quite constant. The *C4* index shows a very high 23.5% market share for the top four players in 1989. This dropped in 1996 to 12.8% and rose again to 17.7% in 2012. Table 6.3 shows the market shares of the top ten publishers in different years. The common market share of the top ten group runs between 22% and 33%, which is a much smaller concentration compared to the popular magazines. In the magazine segment, the top four own about 60% of circulation.

Table 6-3. Market Shares of German Publishers

| Publishers | 1989 | 1992 | 1996 | 2000 | 2004 | 2007 | 2012 |
|-----------------------------|------|------|------|------|------|------|------|
| Klett | 1.2 | 1.6 | 2.0 | 2.4 | 3.6 | 4.4 | 4.7 |
| Cornelsen | – | 1.3 | 1.5 | 1.6 | 3.7 | 3.8 | 4.4 |
| Medien Union | – | – | – | – | 2.5 | 2.9 | 3.2 |
| Weltbild | – | – | 1.2 | 2.1 | 2.8 | 2.5 | 2.6 |
| Bertelsmann (Random House) | 15.1 | 7.7 | 5.7 | – | 2.3 | 2.5 | 3.6 |
| Bertelsmann Springer Group | – | – | – | 8.8 | – | – | – |
| Springer Science + Business | 3.6 | 2.1 | 1.9 | – | 6.0 | 6.3 | 5.0 |
| Bonnier (Sweden) | – | – | – | – | – | 2.2 | 2.3 |
| Holtzbrinck | 2.7 | 3.2 | 2.9 | 1.8 | 2.1 | 2.1 | 2.2 |
| Weka | 2.0 | 2.8 | 3.1 | 3.0 | 2.1 | 2.1 | 2.0 |
| Langenscheid | 1.5 | 1.8 | 2.1 | 1.6 | – | 1.9 | – |
| Süddeutscher Verlag | – | – | 1.2 | 2.6 | 2.4 | – | – |
| Vogel | – | – | – | 3.0 | 2.3 | – | 1.1 |
| Haufe | – | 0.9 | – | 1.6 | – | – | 2.3 |
| Mairs | – | 1.0 | 1.1 | – | – | – | 1.1 |
| Fink-Kümmerly & Frey | – | 1.0 | – | – | – | – | – |
| Markt + Technik | 1.7 | – | – | – | – | – | – |
| Lübbe | 1.7 | – | – | – | – | – | 0.8 |
| ADAC | 1.2 | – | – | – | – | – | – |
| Thieme | 0.9 | – | – | – | – | – | 1.4 |
| % Top 10 | 31.7 | 23.5 | 22.6 | 28.6 | 29.9 | 30.6 | 32.3 |
| C4 | 23.5 | 15.7 | 12.8 | 17.5 | 16.2 | 17.3 | 17.7 |
| HHI | 265 | 92 | 68 | 124 | 103 | 111 | 121 |
| Noam | 84 | 29 | 22 | 39 | 32 | 35 | 34 |

Source: <<http://www.boersenverein.de/de/158286>> 2012 updates provided by editor

Magazines

p. 114 The most influential magazines in Germany are *Stern*, *Der Spiegel*, and *Focus*. Usually, magazines have a higher circulation compared to newspapers ↵ and only 40% are sold via subscription. Several readers often share one copy of a magazine. In recent years the number of titles increased while the circulation per title decreased. As economies of scale are important in this industry, these developments led to decreasing margins for publishers. In 1998, there were 39 titles in Germany with a print run higher than 500,000 and 19 of these titles had a print run higher than one million. Six titles crossed a print run of two million.¹⁶ In 2008, only 26 titles had a print run higher than 500,000 and 11 crossed one million. Only two magazines had a print run higher than two million. The number of magazines sold dropped 25.4% from 1998 to 2008, while the average selling price increased by 20.3%.¹⁷ The concentration is measured by print run.¹⁸

As four publishers make up 60% of the German market, it can be described as oligopolistic.¹⁹ Bauer publishing group is the largest player, with 18.5% market share. With a print run of 8,000,000 magazines,

Bauer is the market leader of TV program guides, as well as for magazines for women and teenagers. Burda is the second largest player, and is also focused on TV program guides and women magazines. Furthermore, Burda owns *Focus* and *Bunte*, both among the most popular magazines in Germany. Founded in 1993, *Focus* had become the third largest magazine in Germany by 2008.

Axel Springer AG is the third largest player and specializes on the general interest segment and program guides. General interest magazines like *Bild der Frau*, *Auto Bild*, and *Sport Bild* refer regularly to *BILD*, the daily newspaper of Axel Springer AG, and vice versa.

Gruner + Jahr (owned by Bertelsmann) is the fourth largest magazine publisher in Germany and focuses on magazines for women and special interest groups. Gruner + Jahr is also the owner of *Stern*, the second largest magazine in Germany.²⁰

Since the end of the 1960s, four publishers have dominated the German magazine market. In the 1970s, the C4 index reached its peak with a market share of 67% for the four largest publishers.²¹ Within the last 28 years, the C4 index decreased slightly and the four large publishers converged in terms of market shares. HHI and Noam Index also decreased slightly.

Similar to daily newspapers, the market for magazines can be divided into two segments: magazines that are published every 14 days and magazines that are published less frequently. In the first segment, the WAZ Group took over the fourth position from Gruner + Jahr in 2008 and ranked fifth in the total magazine market. This was the first time that the order of the four largest publishers changed over the last 28 years. The largest player, Bauer, lost market share, while Burda, Springer, and WAZ gained market share. C4 increased slightly from 2004 to 2008 while HHI and Noam Index remained almost constant (Table 6.4).

Table 6-4. Market Shares in the German Magazine Publishing Market

| Popular Magazines | 1980 | 1985 | 1990 | 1995 | 2000 | 2002 | 2004 | 2006 | 2008 | 2010 | 2012 |
|-----------------------------|-------|-------|-------|-------|------|-------|-------|-------|------|------|------|
| Bauer | 28.5 | 27.9 | 27.6 | 25.6 | 22.3 | 23.4 | 21.1 | 20.7 | 19.5 | 19.0 | 18.5 |
| Burda | 13 | 11.4 | 9.9 | 9.3 | 10.8 | 12.4 | 13.5 | 15.5 | 16.5 | 15.4 | 14.8 |
| Springer | 15.2 | 16.8 | 16.9 | 13.8 | 15.4 | 15.7 | 16.3 | 16.1 | 15.1 | 13.4 | 12.7 |
| Bertelsmann (Gruner + Jahr) | 10.2 | 8.8 | 9.7 | 10.9 | 10.1 | 9.7 | 9.5 | 10.6 | 10.8 | 9.5 | 9.3 |
| Revenue (\$US mln) | | | | | | | 5,146 | 5,530 | | | |
| C4 | 66.9 | 64.9 | 64.2 | 59.6 | 58.6 | 61.2 | 60.4 | 62.9 | 61.9 | 57.3 | 55.3 |
| HHI | 1,319 | 1,266 | 1,242 | 1,051 | 951 | 1,041 | 983 | 1,040 | 997 | 868 | 809 |
| N (>1%) | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Noam | 659 | 633 | 621 | 526 | 476 | 521 | 492 | 520 | 499 | 434 | 405 |

Source: KEK, "Auflagenstärkste Verlagsgruppen" (2009)

As the revenues are increasing in the segment of magazines that are published less frequently than every 14 days, it is particularly interesting to have a closer look at that segment. From 1980 to 1995, all three indices decreased and reached their lowest points.²² After 1995, all three indices increased and returned to their 1980 levels by 2008. Burda, Gruner + Jahr, Springer, and Bauer converged in terms of print run over the years. Due to acquisitions, Axel Springer AG grew from a market share of 1% in this segment in 1995 to 6.5% after 2008.

Newspapers

The newspaper market in Germany can be divided into two categories: those mainly sold via subscription and those mainly sold via retail. Readers spend on average of 40 minutes per day reading newspapers sold via subscription and only 20 minutes with those sold via retail; 95% of all newspapers in Germany are sold via subscription.¹⁰ In 2008, Stuttgarter Zeitung acquired the *Süddeutsche Zeitung*, the eighth largest German newspaper with a daily print run of 430,000.¹¹ This acquisition made Stuttgarter Zeitung the second largest newspaper publisher and the largest publisher of newspapers sold via subscription. This caused the highest increase of concentration since 1989. Axel Springer AG is the largest German newspaper publisher. It is ranked third in the market of subscription newspapers but dominates the retail newspaper market with a market share of 80%.

p. 111 There are several other prominent newspaper publishers in the market. The privately held WAZ publishing group is the third largest German newspaper publisher and structured similarly to the Stuttgarter Zeitung publishing group with a strong focus on subscription newspapers. DuMont is number four in the German market. While having lost its importance in the subscription market, DuMont is still the third largest publisher for newspapers sold via retail. Ippen publishing group is the fifth largest newspaper publisher and is active in both segments.

Our dataset contains concentration measures from 1989 to 2012. The concentration has been measured by print run per year. From 2006 to 2008, we could observe the largest increase of market concentration in our dataset. In 1989, the market share of the top four players equaled 39.6% while in 2008 it was 40.8%. The market share of the ten largest players grew from 54.8% to 58.5% in the same period.

When looking at the concentration indices, we can observe that HHI and Noam index grow consistently over time. C4 also increased due to acquisition activities. We see differences in the indices between the two newspaper markets. In the subscription market, all three indices increased after 1989. This is driven by the acquisitions during this time period. In 2012, the market share of the five largest players was 33.9%. At first glance, the market for newspapers sold via retail looks different. The market share of the top five groups dropped from 39% in 2000 to 37.4% in 2006 because of Mecom's entry into the German market. In 2005, Mecom acquired some newspapers with its German subsidiary company, BV deutsche Vertragsholding, and became one of the ten largest newspaper publishers for newspapers sold via retail. However, when looking at this market it is more important to focus on the absolute numbers and less on the trends (Table 6.1).

Table 6-1. Market Shares in the German Newspaper Market

| | 1989 | 1993 | 1997 | 2000 | 2004 | 2006 | 2008 | 2012 |
|---|-------|-------|-------|-------|-------|-------|---------------------|-------|
| Axel Springer AG | 26.7 | 22.8 | 23.7 | 23.6 | 22.7 | 22.5 | 22.1 | 18.8 |
| Stuttgarter Zeitung | 3.2 | 5.2 | 5.0 | 5.0 | 5.0 | 5.2 | 8.5 | 9.2 |
| Süddeutsche Zeitung | 3.6 | 3.3 | 3.2 | 3.3 | 2.5 | 2.6 | Stuttgarter Zeitung | - |
| Westdeutsche Allgemeine Zeitung (WAZ) (Funke) | 6.0 | 5.6 | 5.9 | 6.0 | 6.0 | 5.6 | 6.0 | 5.7 |
| DuMont Schauberg | 3.3 | 4.5 | 4.0 | 4.4 | 4.0 | 3.9 | 4.2 | 5.5 |
| Ippen-Gruppe | 3.0 | 2.7 | 2.7 | 2.9 | 3.9 | 4.1 | 4.0 | 4.2 |
| Holtzbrinck | | 2.5 | 2.5 | 2.5 | 3.6 | 3.7 | 3.8 | - |
| Frankfurter Allgemeine Zeitung (FAZ) | 2.4 | 3.1 | 3.0 | 3.0 | 3.1 | 3.0 | 3.0 | 2.5 |
| Madsack | 1.9 | 2.1 | 2.3 | 2.4 | 2.5 | 2.5 | 2.5 | 4.9 |
| DDVG | | | | | | 2.2 | 2.4 | 3.1 |
| (Bertelsmann, Gruner + Jahr) | | 3.8 | 3.4 | 2.8 | 2.8 | | | - |
| BV dt. Zeitungsholding | | | | | | | 2.0 | |
| Others | 49.9 | 44.4 | 44.3 | 44.1 | 43.9 | 44.7 | 41.5 | 46.1 |
| Revenue (\$US mln) | | | | | 4,163 | | 4,346 | |
| C4 | 39.6 | 38.1 | 38.6 | 39.0 | 37.7 | 37.4 | 40.8 | 39.2 |
| HHI | 801.4 | 651.4 | 687.1 | 685.5 | 650.4 | 637.2 | 669.8 | 558.3 |
| <i>N</i> (>1%) | 8 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Noam | 283.3 | 206.0 | 217.3 | 216.8 | 205.7 | 201.5 | 211.8 | 197.4 |

Source: Röper (2002, 2004, 2008)

p. 112 **Book Publishing**

With 9 billion € (US \$10.8 billion) in revenues, 800 million books, and about 90,000 new titles per year, Germany is the third largest book market in the world.¹² In Germany, as in other European countries, there is a retail price control that forces each publisher to set a fixed price for each title by law. Looking at the different sales channels, we can observe that retail book trade is quite dominant with a market share of 53.6% in 2007; 18% of revenues are generated via direct sale.¹³

Market shares were measured based on the revenues of the top 100 publishers in each year. The figures were taken from the Buchreport Verlagsranking. These 100 publishers were then grouped together by company. Total revenues of the industry were taken from the reports of the German Book Trades Association.¹⁴

The findings are reported in Table 6.2. In 2007 the three largest book publishers were Springer Science + Business, Klett, and Cornelsen. (Klett offers education books for students and Cornelsen operates in the general education area.)

Table 6-2. Development of Revenues of the Largest (Rank 1–100) Book Publishers (€M)

| Year | Rank 1 | Rank 10 | Rank 25 | Rank 50 | Rank 100 |
|------|--------|---------|---------|---------|----------|
| 2007 | 601 | 150 | 62 | 31 | 7 |
| 2006 | 641 | 164 | 60 | 10 | 7 |
| 2005 | 588 | 144 | 60 | 29 | 7 |
| 2004 | 544 | 185 | 61 | 30 | 7 |
| 2003 | 530 | 161 | 61 | 31 | 6 |
| 2000 | 597 | 135 | 61 | 38 | 7 |
| 1995 | 505 | 83 | 48 | 28 | 9 |
| 1990 | 931 | 56 | 39 | 23 | 7 |

Source: *Buchreport.de*. (2008)

Among publishers that focus on paperback books, Random House (Bertelsmann) was the largest publisher in 2004, followed by Holtzbrinck and Bonnier of Sweden.¹⁵ Holtzbrinck was restructured in 2009 when long-time CEO and 33% shareholder Dieter von Holtzbrinck sold his shares to his siblings and subsequently acquired a stake in Holtzbrinck Group properties such as *Handelsblatt* and *Zeit*.

In general, there is much change within the top group, as this segment is drastically dependent on best sellers. For example, Carlsen was among the top publishers during the years in which the Harry Potter books were released.

The book market in Germany consolidated after 1989. Many small publishers were merged and sold. At the same time, some of the bigger publishers sold the smaller publishers that they just had acquired a short time before. One example is Axel Springer. Only three years after buying into the book market, Springer sold the book publishers it had acquired. Bertelsmann decided to buy all of Springer's book publishers, but the German antitrust agency intervened and Bertelsmann had to divest parts of the acquisition to Bonnier. Bertelsmann also bought, in 1999, the largest book publisher in Germany, Springer Science, and sold it in 2003 to British private equity investors.

Publishers have expanded their business into a broad range of information and entertainment services, but the structure of the industry is mid-size oriented. The ownership structures are almost constant. Table 6.2 shows publishers' revenues, ranked from 1 to 100 according to revenues from 1990 to 2007.

After 2000, concentration remained constant (Table 6.3). In contrast to the preceding years, the indices remain quite constant. The C_4 index shows a very high 23.5% market share for the top four players in 1989. This dropped in 1996 to 12.8% and rose again to 17.7% in 2012. Table 6.3 shows the market shares of the top ten publishers in different years. The common market share of the top ten group runs between 22% and 33%, which is a much smaller concentration compared to the popular magazines. In the magazine segment, the top four own about 60% of circulation.

Table 6-3. Market Shares of German Publishers

| Publishers | 1989 | 1992 | 1996 | 2000 | 2004 | 2007 | 2012 |
|-----------------------------|------|------|------|------|------|------|------|
| Klett | 1.2 | 1.6 | 2.0 | 2.4 | 3.6 | 4.4 | 4.7 |
| Cornelsen | – | 1.3 | 1.5 | 1.6 | 3.7 | 3.8 | 4.4 |
| Medien Union | – | – | – | – | 2.5 | 2.9 | 3.2 |
| Weltbild | – | – | 1.2 | 2.1 | 2.8 | 2.5 | 2.6 |
| Bertelsmann (Random House) | 15.1 | 7.7 | 5.7 | – | 2.3 | 2.5 | 3.6 |
| Bertelsmann Springer Group | – | – | – | 8.8 | – | – | – |
| Springer Science + Business | 3.6 | 2.1 | 1.9 | – | 6.0 | 6.3 | 5.0 |
| Bonnier (Sweden) | – | – | – | – | – | 2.2 | 2.3 |
| Holtzbrinck | 2.7 | 3.2 | 2.9 | 1.8 | 2.1 | 2.1 | 2.2 |
| Weka | 2.0 | 2.8 | 3.1 | 3.0 | 2.1 | 2.1 | 2.0 |
| Langenscheid | 1.5 | 1.8 | 2.1 | 1.6 | – | 1.9 | – |
| Süddeutscher Verlag | – | – | 1.2 | 2.6 | 2.4 | – | – |
| Vogel | – | – | – | 3.0 | 2.3 | – | 1.1 |
| Haufe | – | 0.9 | – | 1.6 | – | – | 2.3 |
| Mairs | – | 1.0 | 1.1 | – | – | – | 1.1 |
| Fink-Kümmerly & Frey | – | 1.0 | – | – | – | – | – |
| Markt + Technik | 1.7 | – | – | – | – | – | – |
| Lübbe | 1.7 | – | – | – | – | – | 0.8 |
| ADAC | 1.2 | – | – | – | – | – | – |
| Thieme | 0.9 | – | – | – | – | – | 1.4 |
| % Top 10 | 31.7 | 23.5 | 22.6 | 28.6 | 29.9 | 30.6 | 32.3 |
| C4 | 23.5 | 15.7 | 12.8 | 17.5 | 16.2 | 17.3 | 17.7 |
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Source: <<http://www.boersenverein.de/de/158286>> 2012 updates provided by editor

Magazines

p. 114 The most influential magazines in Germany are *Stern*, *Der Spiegel*, and *Focus*. Usually, magazines have a higher circulation compared to newspapers ↵ and only 40% are sold via subscription. Several readers often share one copy of a magazine. In recent years the number of titles increased while the circulation per title decreased. As economies of scale are important in this industry, these developments led to decreasing margins for publishers. In 1998, there were 39 titles in Germany with a print run higher than 500,000 and 19 of these titles had a print run higher than one million. Six titles crossed a print run of two million.¹⁶ In 2008, only 26 titles had a print run higher than 500,000 and 11 crossed one million. Only two magazines had a print run higher than two million. The number of magazines sold dropped 25.4% from 1998 to 2008, while the average selling price increased by 20.3%.¹⁷ The concentration is measured by print run.¹⁸

As four publishers make up 60% of the German market, it can be described as oligopolistic.¹⁹ Bauer publishing group is the largest player, with 18.5% market share. With a print run of 8,000,000 magazines,

Bauer is the market leader of TV program guides, as well as for magazines for women and teenagers. Burda is the second largest player, and is also focused on TV program guides and women magazines. Furthermore, Burda owns *Focus* and *Bunte*, both among the most popular magazines in Germany. Founded in 1993, *Focus* had become the third largest magazine in Germany by 2008.

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Since the end of the 1960s, four publishers have dominated the German magazine market. In the 1970s, the C4 index reached its peak with a market share of 67% for the four largest publishers.²¹ Within the last 28 years, the C4 index decreased slightly and the four large publishers converged in terms of market shares. HHI and Noam Index also decreased slightly.

Similar to daily newspapers, the market for magazines can be divided into two segments: magazines that are published every 14 days and magazines that are published less frequently. In the first segment, the WAZ Group took over the fourth position from Gruner + Jahr in 2008 and ranked fifth in the total magazine market. This was the first time that the order of the four largest publishers changed over the last 28 years. The largest player, Bauer, lost market share, while Burda, Springer, and WAZ gained market share. C4 increased slightly from 2004 to 2008 while HHI and Noam Index remained almost constant (Table 6.4).

Table 6-4. Market Shares in the German Magazine Publishing Market

| Popular Magazines | 1980 | 1985 | 1990 | 1995 | 2000 | 2002 | 2004 | 2006 | 2008 | 2010 | 2012 |
|-----------------------------|-------|-------|-------|-------|------|-------|-------|-------|------|------|------|
| Bauer | 28.5 | 27.9 | 27.6 | 25.6 | 22.3 | 23.4 | 21.1 | 20.7 | 19.5 | 19.0 | 18.5 |
| Burda | 13 | 11.4 | 9.9 | 9.3 | 10.8 | 12.4 | 13.5 | 15.5 | 16.5 | 15.4 | 14.8 |
| Springer | 15.2 | 16.8 | 16.9 | 13.8 | 15.4 | 15.7 | 16.3 | 16.1 | 15.1 | 13.4 | 12.7 |
| Bertelsmann (Gruner + Jahr) | 10.2 | 8.8 | 9.7 | 10.9 | 10.1 | 9.7 | 9.5 | 10.6 | 10.8 | 9.5 | 9.3 |
| Revenue (\$US mln) | | | | | | | 5,146 | 5,530 | | | |
| C4 | 66.9 | 64.9 | 64.2 | 59.6 | 58.6 | 61.2 | 60.4 | 62.9 | 61.9 | 57.3 | 55.3 |
| HHI | 1,319 | 1,266 | 1,242 | 1,051 | 951 | 1,041 | 983 | 1,040 | 997 | 868 | 809 |
| N (>1%) | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Noam | 659 | 633 | 621 | 526 | 476 | 521 | 492 | 520 | 499 | 434 | 405 |

Source: KEK, "Auflagenstärkste Verlagsgruppen" (2009)

As the revenues are increasing in the segment of magazines that are published less frequently than every 14 days, it is particularly interesting to have a closer look at that segment. From 1980 to 1995, all three indices decreased and reached their lowest points.²² After 1995, all three indices increased and returned to their 1980 levels by 2008. Burda, Gruner + Jahr, Springer, and Bauer converged in terms of print run over the years. Due to acquisitions, Axel Springer AG grew from a market share of 1% in this segment in 1995 to 6.5% after 2008.

Radio

The German radio market is shaped by the regional structure of each German state. National radio stations are rare and of low importance.²³ The number of local stations is high. Of German radio stations, 30% are local, 65% are broadcast statewide, and only 5% are national. Terrestrial radio transmission over VHF, using FM, is dominant, but other types of transmission such as DAB still play a minor role. Because of the regional and local structure of the German radio, the concentration of the market is low. On a nationwide level, no private radio network reaches the critical value of 30% market share, a concentration limit defined by the KEK.²⁴

Similar to the German TV market, the radio market is characterized by a dual system of public and private stations. The first private stations were introduced in 1984. In the first wave of licensing, local newspapers publishers played a dominant role.²⁵

Following national reunification, in a second phase from 1992 to 1995, new stations were licensed in the former East Germany. Between 1995 and 2000, the radio industry was booming. The number of listeners, as well as advertising revenues, kept growing. At its peak in 2000, statewide private radio stations earned an operating margin of 20 to 30%. After 2001, the economic environment deteriorated and the advertising market decreased. Parallel to that, many statewide private radio stations lost listeners to public radio programs. In 2009, the market share of public radio stations was about 50%, depending on the state.²⁶

The number of radio stations grew significantly from 40 public and 100 private channels in 1989 to 59 public and 213 private channels in 2008.²⁷ In order to measure concentration, the market shares are based on the Media Analyse Radio, a semiannual survey by the Arbeitsgemeinschaft Media-Analyse (AG.MA). All advertising agencies base their media planning on this dataset.

The most important players in radio are media companies that are also engaged in TV. RTL Group (Bertelsmann) holds shares in 19 statewide and regional radio stations.²⁸ Axel Springer AG is a shareholder of 18 statewide stations and also is invested in Sat.1 and ProSieben. Hubert Burda Media holds interests in various radio stations and RTL II.

Other major players are NRJ, Energy-Holding, Moira Rundfunk, Madsack, Nordwest-Medien-Holding, WAZ (newspaper company), Zeitungsgruppe Ippen (newspaper company), Frank Otto Medienbeteiligung, and Oschmann-Gruppe. The commercial radio market is mainly owned by newspaper publishing companies.²⁹

The commercial radio stations with the largest market share are Radio NRW, Antenne Bayern, Hit Radio FFH, ffn, Hit-Radio Antenne, RPR Eins, radio SAW, Hit-Radio Antenne 1 (Stuttgart), R.SH, and Radio PSR.³⁰ Because the German radio market is mostly state-based, concentration has to be measured on a state level rather than on a nationwide level. We therefore focus on the biggest state, namely Bavaria, to measure the development of market concentration. The revenues shown in Table 6.5 are advertising net revenues.

Table 6-5. Market Shares of German Radio Stations and Networks in Bavaria (%): 1996–2009

| | 1996 | 2000 | 2003 | 2007 | 2009 |
|------------------------------|------|------|-------|-------|-------|
| Public Channels | | | 45.0 | 40.3 | 46.3 |
| Antenne Bayern | | | 19.1 | 28.8 | 27.4 |
| Bayern Funpaket ¹ | | | 23.7 | 22.8 | 17.8 |
| Radio Arabella | | | 3.1 | 2.2 | 1.5 |
| Radio Galaxy | | | 1.0 | 1.6 | |
| Radio Gong 96,3 (München) | | | 2.1 | 1.6 | 1.0 |
| Klassik Radio | | | 1.0 | 1.6 | 1.0 |
| Radio-Kombi Ba-Wü | | | | 1.1 | 2.0 |
| Energy München | | | 1.0 | | 1.0 |
| 95.5 Charivari (München) | | | 0.5 | | 0.5 |
| Rock Antenne | | | 1.0 | | 1.5 |
| Radio Melodie | | | 1.0 | | |
| Radio 7 | | | 1.0 | | 0.5 |
| Total Revenues (€ m) | 547 | 742 | 603 | 678 | 680 |
| Total Revenues (\$ m) | | 987 | 681 | 929 | 952 |
| C4 | 0 | 0 | 91.0 | 94.0 | 93.0 |
| HHI | 0 | 0 | 2,970 | 2,987 | 3,223 |
| <i>N</i> (>1%) | 0 | 0 | 11 | 8 | 9 |
| Noam | | | 895 | 1,056 | 1,074 |
| Sum of Total Market Shares | 0 | 0 | 100 | 100 | 100 |

1 Bayern Fun Paket is an aggregation of over 50 local radio stations. They are marketed as one package, but they do not have the same ownership structure. Media Analyse Radio reports their market share as an aggregate, and therefore they are treated as one player for the calculation of C4 and HHI. For the calculation of the Noam Index the number of all stations has been taken into account, and there is therefore an enormous difference between the concentration in terms of HHI and Noam Index.

p. 117 **Broadcast Television (Over-the-Air)**

The terrestrial transmission of TV has a low audience in Germany equaling 5% of the population, or 2,000,000 people.³¹ Most people watch TV via cable (50%) or satellite (44%). In 2010, TV started streaming via Internet, capturing an initial 2.5% of viewers.³² Depending upon location, up to 28 channels can be received via terrestrial TV. Eight public channels, including ZDF and ARD, can be watched across Germany. Terrestrial TV is free. In terms of revenues, terrestrial TV accounts for 5% of all TV viewing in Germany. We therefore assumed that the revenue of terrestrial TV accounts for this percentage of the overall TV revenue in Germany (Table 6.6).

Table 6-6. Total Revenues Broadcast TV (Over the Air): 1984–2010

| | 1984 | 1985 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2010 |
|-------------------------------------|------|------|------|------|------|------|------|------|------|
| Total Revenue (€ m) Terrestrial TV | 44 | 47 | 60 | 164 | 419 | 580 | 562 | 616 | 682 |
| Total Revenue (\$ m) Terrestrial TV | | | | | | 540 | 697 | 844 | 907 |

Multichannel TV Platforms

Cable and satellite platforms are the two major technologies to process TV signals in Germany. From 2005 to 2009, slightly more households received their TV signal by cable than by satellite. Terrestrial broadcasting remains at a relatively low level, while IPTV is gaining ground slowly (Table 6.7).

Table 6-7. Market Shares of TV Signal Distribution Technologies in German Households (%)

| | Cable | Satellite | Terrestrial | IPTV |
|------|-------|-----------|-------------|------|
| 2005 | 50.4 | 44.0 | 5.6 | 0.0 |
| 2006 | 49.7 | 44.9 | 5.6 | 0.1 |
| 2007 | 48.4 | 45.1 | 5.4 | 0.5 |
| 2008 | 48.8 | 43.0 | 6.1 | 1.4 |
| 2009 | 49.2 | 42.9 | 6.9 | 2.6 |

Source: PricewaterhouseCoopers (2010).

With a technical reach of up to 28 million households, the German cable TV market is the largest in Europe. The cable network was created by the state-owned Deutsche Bundespost in the 1980s and can be divided into four structural levels. On level 1, the broadcasting company uploads the signal to a satellite. On level 2, the signal is received from the satellite and is sent to central cable backbone nodes. On level 3, the signal is transmitted via coaxial or fiber-optic cable to distribution nodes in the public streets. On level 4, the signal is transmitted via cable on private property to the end consumer.

p. 118 From 2000 to 2003, Deutsche Telekom, which emerged as the privatized monopolistic provider from Deutsche Bundespost, was forced by EU regulatory officials to sell parts of its cable network in levels 3 and 4 to companies like Kabel Deutschland and Kabel BW. In 2004, Kabel Deutschland planned to take over several competitors with the potential to gain nearly monopolistic power and therefore was stopped by regulatory offices. In 2005, the two regional cable network providers Ish (Nordrhein-Westfalen) and Iesy (Hessen) attempted a merger that was completed in 2007 under the new name Unitymedia. Through the acquisition of Tele Columbus West in 2007, Unitymedia became the second largest cable network provider after Kabel Deutschland. Kabel BW was third.

Kabel Deutschland offers cable TV, broadband Internet access, and telephone services in 13 of the 16 federal states in Germany, with a customer base of 8.7 million households in 2009. Unitymedia serves in the states of North Rhine-Westphalia and Hesse with a total of 4.5 million households. Kabel BW serves 2.3 million households in Baden-Württemberg. Tele Columbus serves 2.3 million and PrimaCom serves 850,000 households, mainly in eastern Germany.

Besides these major market participants there are several hundred small- to medium-sized companies offering cable TV services on a regional or city level (city-carriers), with customer bases ranging from 2,000 to 300,000. Some of the bigger city carriers are EWETel in Hamburg (Northern Germany), Net-Cologne (Middle Germany), and M-Net in Munich (Southern Germany). Like the large market participants, these companies offer triple play services (TV, Internet access, and telephone services).

German cable providers generated a total revenue of 3.6 billion € (US \$5.0 billion) in 2009 (Table 6.8). The main revenue source was TV access with 63% of total revenues. However, since 2007 the provision of broadband Internet access became a larger driving force of business. In 2008, the cable providers gained 710,000 (+ 79%) customers. In 2009, they gained 770,000 (+ 48%) customers in that segment.

Table 6-8. Revenues and Market Shares of Cable Platform Providers in Germany 2009–2011

| | Company Revenues 2009 (\$ billion) | Market Share By Revenue 2009 | Company Revenues 2011 (\$ billion) | Market Shares by Revenues 2011 (\$ billion) |
|--|---------------------------------------|---------------------------------|---------------------------------------|--|
| Kabel Deutschland | 2.1 | 47 | 2.0 | 45 |
| Unitymedia | 1.3 | 28 | 1.3 | 30 |
| Kabel BW | 0.7 | 16 | 0.8 | 17 |
| Tele Columbia | 0.3 | 6 | 0.3 | 6 |
| Medfort S à r.l (Primacon) ¹ | 0.1 | 3 | 0.1* | 2 |
| Total Revenues (\$US million) | 4,460 | | 4,480 | |
| C4 | | 97 | | 98 |
| HHI | | 3,294 | | 3,254 |
| N (>1%) | | 5 | | 5 |
| Noam | | 1,473 | | 1,455 |

Source: Solon Management Consultants“Wirtschaftsfaktor Kabel.” Solon Management Consultants. Last accessed on August 10, 2012 at <http://www.anga.de/media/file/10.Solon-Studie_Wirtschaftsfaktor_Kabel_final.pdf>. 2011 updates provided by editors

1 Primacon was bought by Medfort S à r.l in 2010.

p. 119 The German satellite TV platform provider market can be described as a duopoly between SES ASTRA and Eutelsat S.A. SES ASTRA is a full subsidiary of SES S.A., the worldwide leading provider of satellite communication services. In 2001, SES took over the satellite fleet of GE AMERICOM (General Electric). In the process of that acquisition, SES S.A. (SES Global) was founded as a holding company for the two satellite platform providers SES ASTRA and SES WORLD SKIES. The SES S.A. equities can be divided into class A and class B. Class A is owned by private investors. Class B is not publicly traded and is owned by the state of Luxembourg (or companies largely controlled by the state of Luxembourg).

Besides SES ASTRA, Eutelsat S.A. is the largest provider of satellite TV services in Germany and in all of Europe. With a fleet of 30 satellites, more than 4,000 TV channels, and 1,100 radio channels are transmitted to around 190 million households in Europe.³³ The holding company Eutelsat Communications S.A. owns 96.11% of the holding company; 3.89% is owned by other shareholders.³⁴

Information about exact market shares of satellite platform providers for DTH reception is not available through Kommission zur Ermittlung der Konzentration (KEK).³⁵ According to SES ASTRA,³⁶ the company served up to 17 million German households with satellite signals in 2007. SES ASTRA’s market dominance in the DTH segment explains Eutelsat’s significantly smaller market share. There are a relatively high number of so-called Dual-Feed-Antennas. These antennas receive TV signals from more than one orbital position. Also, cable providers use various satellite sources simultaneously to feed into their networks.

The German TV landscape is shaped by the dual system of public and private channels. Private TV channels were introduced after the liberalization of the TV market in the 1980s. The concentration in the German TV industry is high, but has declined since the start of the first two private channels, RTL and Sat.1, in 1984. Today, about 40% of the viewing time is spent on public channels and two TV groups dominate the private market: ProSiebenSat.1 Media AG and RTL Group.

The program offered by public stations is mainly financed by tax-like fees, collected by the state. Private stations are primarily financed by the advertising industry and are mostly free. Pay TV only has a small market share of about 8% in Germany. Concentration in the TV industry has been deduced from the concentration of viewing time, measured by the Gesellschaft für Konsumforschung (GfK)/Arbeitsgemeinschaft Fernsehforschung (AGF).³⁷ Since the advertising spending is allocated

according to the viewing time concentration, it is an adequate measurement of the market share. The ownership was assigned according to the annual reports of the Kommission zur Ermittlung der Konzentration (KEK).³⁸

The two major public channels in Germany are ARD and ZDF. License fees mainly finance them both, and their program mandate is governed by the Interstate Treaty on Broadcasting (Rundfunkstaatsvertrag).

On January 1, 1984, PKS, which was later renamed Sat.1, became the first private channel in Germany, followed by RTL one day later. This changed the monopoly of the public channels into a public-private mixed broadcasting system. The private channels were broadcast over cable and satellite only.

p. 120 In the first years after introducing private channels, their market share grew slowly. In 1988, private channels only had a market share of 9.9%. More and more households were connected to cable or satellite, thus making it possible to receive private channels. However, the quality of the private programming was low and viewers were used to the shows on the public channels.

This situation changed dramatically in the 1990s. In 1992 private channels had a market share of 39.3% and in 1996 a share of 56.2%. The number of channels increased and special interest channels were introduced. Also, new media companies entered the German TV market. While in 1992 all of the private channels belonged either to the Kirch Group (later ProSiebenSat.1) or RTL Group, by 2000 Télévision Française, News Corp, and Time Warner owned 2.7% of the German TV market. This number increased to 5.9% in 2007, while the market share of the large TV conglomerates ProSiebenSat.1 and RTL Group decreased to 20.8% and 25.3%, respectively. The market share of the public channels steadily decreased from 1985 until 1996. Since the year 2000, the market share has been stable at around 43%.

RTL Group is part of the worldwide media conglomerate of Bertelsmann AG. Bertelsmann holds 89.8% of the shares of RTL Group.³⁹ The remaining 10.2% is held by a diverse set of investors. The RTL Group is the largest TV and radio group in Europe, holding shares in 39 TV and 32 radio stations in ten countries, though the highest revenues come from the German stations.⁴⁰ RTL Group was founded in 2000 as a merger of CLT-UFA and Pearson TV. Bertelsmann became the major shareholder with 90% of the shares in 2001. German channels belonging to the RTL Group are RTL, RTL II, N-TV, VOX, RTL Living, RTL Crime, RTL Passion, and RTL Shop.

ProSiebenSat.1 Media AG holds shares in 24 free TV, 24 pay TV, and 22 radio networks in 13 European countries.⁴¹ The company was created in 2000 by the merger of Pro Sieben Media AG and Sat.1 Satelliten Fernsehen GmbH. Both were affiliated with the media conglomerate of Leo Kirch, an important figure in German TV. In 2002, Kirch went bankrupt. The US investor Haim Saban took over the majority of the shares of ProSiebenSat.1. In 2005, the publishing house Axel Springer intended to acquire ProSiebenSat.1, but the transaction was blocked by the Bundeskartellamt and KEK due to antitrust concerns. In 2006, Saban sold his stake to the American private equity firms Permira and KKR for about 3 billion €. Since 2008, 100% of the shares of the group have been held by Lavena Holdings 4 GmbH, which is owned by the two private equity companies KKR and Permira. Together with SBS Broadcasting Group, another investment of Permira and KKR, they hold significant investments in European media. German speaking channels of ProSiebenSat.1 Media are Sat.1, ProSieben, Kabel Eins, N24, 9Live, Sat.1 Comedy, and Kabel Eins Classic.

The C4 index decreased from 1985 to 2012. The HHI also strongly decreased from 1985 to 2012. The only increase can be detected from 1996 to 2000, probably caused by a change in regulation. After 1996, companies were allowed to hold a majority stake in more than one TV station, which had previously not been allowed. This facilitated mergers and acquisitions, although the change in the data is not very drastic (Table 6.9).

Table 6-9. National Market Shares of German Satellite and Cable TV Channels (%)¹

| | 1985 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2012 |
|---|------|------|------|------|------|------|------|------|
| Public Channels | 96.2 | 84.7 | 52.0 | 40.5 | 43.1 | 44.3 | 43.6 | 37.5 |
| ARD | 43.4 | 37.8 | 22.0 | 14.8 | 14.3 | 13.9 | 13.4 | 12.3 |
| ZDF | 42.6 | 36.2 | 22.0 | 14.4 | 13.3 | 13.6 | 12.9 | 12.6 |
| Other Public (Aggregate Regional) | 10.2 | 10.7 | 8.30 | 11.3 | 15.5 | 16.8 | 17.3 | 12.6 |
| ProSiebenSat.1 Media AG (formerly Kirch Group, now owned KKR/Permira) | | 5.8 | 22.6 | 27.4 | 26.2 | 21.9 | 20.8 | 20.2 |
| Sat.1 | | 5.8 | 13.1 | 13.2 | 10.2 | 10.3 | 9.6 | 9.4 |
| ProSieben | | | 6.5 | 9.5 | 8.2 | 7.0 | 6.5 | 5.9 |
| Kabel 1 | | | | 3.6 | 5.5 | 4.0 | 3.6 | 3.9 |
| DSF (* until 2003) | | | 3.0 | 1.1 | 1.2 | | | |
| N 24 | | | | | | 0.4 | 0.9 | 1.0 |
| Premiere (* 1997–2003) | | | | | 1.1 | | | |
| 9Live (* since 2001) | | | | | | 0.2 | 0.2 | - |
| RTL Group (formerly CLT/UFA, now Bertelsmann) | 0.4 | 4.1 | 16.7 | 26.6 | 24.7 | 25.6 | 25.3 | 25.1 |
| RTL | 0.4 | 4.1 | 16.7 | 17 | 14.3 | 13.8 | 12.4 | 12.3 |
| Super RTL, RTL II, VOX | | | | 9.6 | 10.4 | 11.3 | 12.2 | 11.9 |
| n-tv (* since 2002) | | | | | | 0.5 | 0.7 | 0.9 |
| Télévision Francaise (Bouygues, France) | | | | 1.2 | 1.0 | 0.9 | 1.0 | 0.7 |
| Eurosport | | | | 1.2 | 1.0 | 0.9 | 1.0 | 0.7 |
| Viacom (US) | | | | | | 1.4 | 1.8 | 1.5 |
| MTV, MTV2, Viva, Comedy Central, Nick | | | | | | 1.4 | 1.8 | 1.5 |
| EM.Sport Media | | | | | | 1.1 | 1.1 | 0.7 |
| DSF (* since 2005) | | | | | | 1.1 | 1.1 | 0.7 |
| News Corp (US/UK) | | | | | 1.0 | | | |
| 9Live (* 2000–2001) | | | | | 1.0 | | | |
| Investment Group Permira | | | | | | 2.4 | | |
| Premiere (*2003–2006) | | | | | | 2.4 | | |
| Ufa /Canal Plus France | | | | 0.7 | | | | |

| | | | | | | | | |
|---|-------|-------|-------|-------|--------|--------|--------|-------------|
| Premiere (* until 1997) | | | | | | | | 0.7 |
| Time Warner (US) | | | | | | | | 0.3 0.7 |
| n-tv (* until 2002) | | | | | | | | 0.3 0.7 |
| Tele-München | | | | | | | | 0.3 0.7 1.0 |
| Tele 5 | | | | | | | | 0.3 0.7 1.0 |
| Discovery Communications (US) | | | | | | | | 0.1 0.5 0.7 |
| DMAX | | | | | | | | 0.1 0.5 0.7 |
| MMW Minimovie World (REN Media Group, Lesnevsky Family, Russia) | | | | | | | | 0.8 0.2 |
| Das Vierte | | | | | | | | 0.8 0.2 |
| Other | 3.4 | 5.4 | 11.4 | 5.4 | 7.3 | 2 | 4.4 | 12.4 |
| Total Revenues (€ m) | 888 | 1,139 | 3,106 | 7,962 | 11,019 | 11,322 | 11,698 | |
| Total Revenues (\$ m) | | | | | 10,137 | 14,048 | 16,027 | 19,974 |
| C4 | 97 | 95 | 92 | 96 | 95 | 94 | 92 | 84.3 |
| HHI | 9,255 | 7,225 | 3,525 | 3,101 | 3,157 | 3,107 | 2,981 | 2,449 |
| N (>1%) | 2 | 6 | 8 | 12 | 11 | 14 | 12 | 9 |
| Noam | 6,544 | 4,171 | 2,035 | 1,266 | 1,289 | 1,036 | 994 | 816 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | |

1 All channels with an asterisk

* have changed their owner over time.

Video Portals

Based on the quantity of regular users and the intensity of videos being watched online, video portals represent one of the Internet's most popular features. Video portals sit on the fence between traditional television and the Internet. They allow users to publish their own content, and they provide other users with user-generated content usually at no charge.⁴²

p. 121 Video portals mainly derive their revenues from advertisements, which are either placed on ↴

p. 122 ↴

p. 123 ↴

their website or are integrated specifically into their hosted videos.⁴³ Hence, the respective market shares have been deducted from the monthly number of videos viewed. Google's video portal comprises YouTube and Google Video. Founded in February 2005, YouTube quickly gained brand awareness and market share. Google acquired YouTube in October 2006, and this acquisition helped Google significantly increase its overall market share. In 2006, Google Video amounted to roughly 8% market share.⁴⁴ In the following years, Google's video portals achieved a combined market share of 52.1% in 2008 and 48.3% in 2010. Hence, YouTube and Google Video are by far the biggest players in the German video portals market.

Megavideo had the second biggest market share in 2010. German users viewed over 200,000 videos hosted by this video portal in July 2010, resulting in a market share of less than 3% for Megavideo. ProSiebenSat1, with its video portals such as MyVideo.de, is the third biggest player in the German market. However, those video portals only account for a combined market share of less than 2%.

RTL Group's video portals such as Clipfish.de have an accumulated market share of less than 1% in 2010. Similar to the TV network ProSiebenSat1 mentioned above, the RTL Group publishes user-generated content and its own content on its video portals.

p. 124 The market includes other competitors such as the video portals from Yahoo and Microsoft. Both corporations entered the market rather late: in 2006 and 2007, respectively.⁴⁵ Furthermore, the market is characterized by a multiplicity of small- and medium-sized competitors such as ZDF Mediathek, AOL sites, and Vevo, as well as a high level of illegal and semi-legal video portals. The overall number of video portals in the market has increased continuously and is subject to certain volatility (Table 6.10).

Table 6-10. National Market Shares of Video Portals (%)

| | 2008 ¹ | 2010 ² |
|--|-------------------|-------------------|
| Google Sites (YouTube, Google Video) | 52.1 | 48.3 |
| Megavideo | 1.0 | 2.6 |
| ProSiebenSat1 Sites (MyVideo.de) | 1.5 | 1.2 |
| RTL Group Sites (Clipfish.de) | 1.1 | 0.6 |
| Microsoft Sites | 0.4 | 0.4 |
| Dailymotion.de | 0.2 | 0.3 |
| Yahoo Sites (Yahoo Video) | 0.3 | 0.1 |
| Others (e.g. AOL Sites, T-Online Sites, Vevo, ZDF Mediathek) | 43.4 | 46.6 |
| Sum of Total Market Shares | 100 | 100 |
| Total Revenues (€ m) | n.a. | n.a. |
| Total Revenues (\$ m) | n.a. | n.a. |
| C4 | 55.7 | 52.6 |
| HHI | 2,718 | 2,337 |
| Noam | 1,028 | 884 |

1 ComScore Video Metrix. *Comscore*. October 20, 2008. Last accessed on August 10, 2012 at <http://www.comscore.com/Press_Events/Press_Releases/2008/10/German_YouTube_Viewers>

2 ComScore Video Metrix. *Comscore*. September 14, 2010. Last accessed on August 10, 2012 at <http://www.comscore.com/Press_Events/Press_Releases/2010/9/Online-Video_Konsum_in_Deutschland_steigt_weiter_stark_an?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+comscore+%28comScore+Networks%29&utm_content=Google+Feedfetcher>

Besides Google's acquisition of YouTube, a major change in ownership did not occur in this comparably young and highly concentrated market.

p. 125 **Film**

The market for the production and distribution of film and television content is highly global. The respective German market has been dominated by large American companies. However, several predominantly German players have been able to maintain an aggregated market share of 21% to 38%.

The market shares were obtained from adjacent research that derived the respective market shares from the companies' revenues.^{46,47}

Other market participants include German and foreign companies such as Universum Film AG, Bavaria Film Gruppe, Brainpool TV GmbH, Endemol Gruppe, Constantin Film, Tobis, and MGM.

Besides the industry's major mergers and acquisitions mentioned above, several small market participants have been acquired by the big six German market players for the production and distribution of film and television content. The stagnating HHI between 560 and 856 implies a less concentrated market despite the seemingly dominant handful of big players in the market (Table 6.11).

Table 6-11. National Market Shares of Film and TV Production and Distribution (in %): 1984–2010

| | 1984 ¹ | 1989 | 1992 | 1996 ² | 2000 | 2004 | 2008 | 2010 ³ |
|---|-------------------|-------|-------|-------------------|-------|-------|-------|-------------------|
| Warner Bros. Entertainment (Time Warner, US) | 10.0 | 14.1 | 15.2 | 14.7 | 10.0 | 13.5 | 16.6 | 14.8 |
| Paramount Pictures (Viacom, US) | 14.0 | 11.3 | 8.8 | 11.6 | 10.0 | 9.5 | 13.9 | 13.2 |
| DreamWorks SKG | - | - | - | - | 8.0 | 11.1 | - | - |
| Twentieth Century Fox (21st Century Fox/Murdoch, US/UK) | 6.0 | 7.7 | 5.7 | 8.2 | 9.0 | 9.3 | 9.0 | 11.7 |
| Walt Disney Motion Pictures (US) | 9.0 | 11.1 | 11.0 | 14.2 | 13.0 | 9.7 | 10.2 | 11.1 |
| Miramax | 3.0 | 2.4 | 4.1 | - | - | - | - | - |
| Pixar Animation Studios | - | - | - | n.a. | n.a. | 1.6 | - | - |
| Marvel Entertainment | - | - | - | n.a. | 1.0 | 1.2 | 3.1 | - |
| Sony Pictures Entertainment (Japan/US) | - | - | 10.5 | 11.7 | 8.0 | 13.4 | 10.3 | 10.4 |
| Columbia Pictures | 8.0 | 9.8 | - | - | - | - | - | - |
| Tri-Star Pictures | 5.0 | - | - | - | - | - | - | - |
| Universal Pictures (US/France) | 7.0 | 10.5 | 13.3 | 12.1 | 13.0 | 9.1 | 12.8 | 9.7 |
| Other (MGM, Constantin Film, Tobis, etc.) | 38.0 | 33.1 | 31.4 | 27.5 | 28.0 | 21.6 | 24.1 | 29.1 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Total revenues (€ m) ^{4, 5,6,7} | 1,112 | 1,245 | 1,632 | 1,815 | 2,127 | 2,639 | 2,356 | 2,807 |
| Total revenues (\$ m) | | | | | 1,957 | 3,272 | 3,487 | 3,733 |
| C4 | 41 | 47 | 50 | 53 | 46 | 48 | 50 | 71 |
| HHI | 560 | 721 | 766 | 903 | 748 | 843 | 933 | 856 |
| <i>N</i> (>1%) | 8 | 7 | 7 | 6 | 8 | 9 | 7 | 6 |
| Noam | 198 | 273 | 289,5 | 369 | 265 | 281 | 353 | 349 |

1 (Frank 1993).

2 (Hachmeister and Rager 2003).

3 PricewaterhouseCoopers (2010).

4 Uka (2004).

5 Total revenue in € m for 1988.

6 Total revenue in € m for 1998.

7 Total revenue in € m for 2001.

Radio

The German radio market is shaped by the regional structure of each German state. National radio stations are rare and of low importance.²³ The number of local stations is high. Of German radio stations, 30% are local, 65% are broadcast statewide, and only 5% are national. Terrestrial radio transmission over VHF, using FM, is dominant, but other types of transmission such as DAB still play a minor role. Because of the regional and local structure of the German radio, the concentration of the market is low. On a nationwide level, no private radio network reaches the critical value of 30% market share, a concentration limit defined by the KEK.²⁴

Similar to the German TV market, the radio market is characterized by a dual system of public and private stations. The first private stations were introduced in 1984. In the first wave of licensing, local newspapers publishers played a dominant role.²⁵

Following national reunification, in a second phase from 1992 to 1995, new stations were licensed in the former East Germany. Between 1995 and 2000, the radio industry was booming. The number of listeners, as well as advertising revenues, kept growing. At its peak in 2000, statewide private radio stations earned an operating margin of 20 to 30%. After 2001, the economic environment deteriorated and the advertising market decreased. Parallel to that, many statewide private radio stations lost listeners to public radio programs. In 2009, the market share of public radio stations was about 50%, depending on the state.²⁶

The number of radio stations grew significantly from 40 public and 100 private channels in 1989 to 59 public and 213 private channels in 2008.²⁷ In order to measure concentration, the market shares are based on the Media Analyse Radio, a semiannual survey by the Arbeitsgemeinschaft Media-Analyse (AG.MA). All advertising agencies base their media planning on this dataset.

The most important players in radio are media companies that are also engaged in TV. RTL Group (Bertelsmann) holds shares in 19 statewide and regional radio stations.²⁸ Axel Springer AG is a shareholder of 18 statewide stations and also is invested in Sat.1 and ProSieben. Hubert Burda Media holds interests in various radio stations and RTL II.

Other major players are NRJ, Energy-Holding, Moira Rundfunk, Madsack, Nordwest-Medien-Holding, WAZ (newspaper company), Zeitungsgruppe Ippen (newspaper company), Frank Otto Medienbeteiligung, and Oschmann-Gruppe. The commercial radio market is mainly owned by newspaper publishing companies.²⁹

The commercial radio stations with the largest market share are Radio NRW, Antenne Bayern, Hit Radio FFH, ffn, Hit-Radio Antenne, RPR Eins, radio SAW, Hit-Radio Antenne 1 (Stuttgart), R.SH, and Radio PSR.³⁰ Because the German radio market is mostly state-based, concentration has to be measured on a state level rather than on a nationwide level. We therefore focus on the biggest state, namely Bavaria, to measure the development of market concentration. The revenues shown in Table 6.5 are advertising net revenues.

Table 6-5. Market Shares of German Radio Stations and Networks in Bavaria (%): 1996–2009

| | 1996 | 2000 | 2003 | 2007 | 2009 |
|------------------------------|------|------|-------|-------|-------|
| Public Channels | | | 45.0 | 40.3 | 46.3 |
| Antenne Bayern | | | 19.1 | 28.8 | 27.4 |
| Bayern Funpaket ¹ | | | 23.7 | 22.8 | 17.8 |
| Radio Arabella | | | 3.1 | 2.2 | 1.5 |
| Radio Galaxy | | | 1.0 | 1.6 | |
| Radio Gong 96,3 (München) | | | 2.1 | 1.6 | 1.0 |
| Klassik Radio | | | 1.0 | 1.6 | 1.0 |
| Radio-Kombi Ba-Wü | | | | 1.1 | 2.0 |
| Energy München | | | 1.0 | | 1.0 |
| 95.5 Charivari (München) | | | 0.5 | | 0.5 |
| Rock Antenne | | | 1.0 | | 1.5 |
| Radio Melodie | | | 1.0 | | |
| Radio 7 | | | 1.0 | | 0.5 |
| Total Revenues (€ m) | 547 | 742 | 603 | 678 | 680 |
| Total Revenues (\$ m) | | 987 | 681 | 929 | 952 |
| C4 | 0 | 0 | 91.0 | 94.0 | 93.0 |
| HHI | 0 | 0 | 2,970 | 2,987 | 3,223 |
| <i>N</i> (>1%) | 0 | 0 | 11 | 8 | 9 |
| Noam | | | 895 | 1,056 | 1,074 |
| Sum of Total Market Shares | 0 | 0 | 100 | 100 | 100 |

- 1 Bayern Fun Paket is an aggregation of over 50 local radio stations. They are marketed as one package, but they do not have the same ownership structure. Media Analyse Radio reports their market share as an aggregate, and therefore they are treated as one player for the calculation of C4 and HHI. For the calculation of the Noam Index the number of all stations has been taken into account, and there is therefore an enormous difference between the concentration in terms of HHI and Noam Index.

p. 117 **Broadcast Television (Over-the-Air)**

The terrestrial transmission of TV has a low audience in Germany equaling 5% of the population, or 2,000,000 people.³¹ Most people watch TV via cable (50%) or satellite (44%). In 2010, TV started streaming via Internet, capturing an initial 2.5% of viewers.³² Depending upon location, up to 28 channels can be received via terrestrial TV. Eight public channels, including ZDF and ARD, can be watched across Germany. Terrestrial TV is free. In terms of revenues, terrestrial TV accounts for 5% of all TV viewing in Germany. We therefore assumed that the revenue of terrestrial TV accounts for this percentage of the overall TV revenue in Germany (Table 6.6).

Table 6-6. Total Revenues Broadcast TV (Over the Air): 1984–2010

| | 1984 | 1985 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2010 |
|-------------------------------------|------|------|------|------|------|------|------|------|------|
| Total Revenue (€ m) Terrestrial TV | 44 | 47 | 60 | 164 | 419 | 580 | 562 | 616 | 682 |
| Total Revenue (\$ m) Terrestrial TV | | | | | | 540 | 697 | 844 | 907 |

Multichannel TV Platforms

Cable and satellite platforms are the two major technologies to process TV signals in Germany. From 2005 to 2009, slightly more households received their TV signal by cable than by satellite. Terrestrial broadcasting remains at a relatively low level, while IPTV is gaining ground slowly (Table 6.7).

Table 6-7. Market Shares of TV Signal Distribution Technologies in German Households (%)

| | Cable | Satellite | Terrestrial | IPTV |
|------|-------|-----------|-------------|------|
| 2005 | 50.4 | 44.0 | 5.6 | 0.0 |
| 2006 | 49.7 | 44.9 | 5.6 | 0.1 |
| 2007 | 48.4 | 45.1 | 5.4 | 0.5 |
| 2008 | 48.8 | 43.0 | 6.1 | 1.4 |
| 2009 | 49.2 | 42.9 | 6.9 | 2.6 |

Source: PricewaterhouseCoopers (2010).

With a technical reach of up to 28 million households, the German cable TV market is the largest in Europe. The cable network was created by the state-owned Deutsche Bundespost in the 1980s and can be divided into four structural levels. On level 1, the broadcasting company uploads the signal to a satellite. On level 2, the signal is received from the satellite and is sent to central cable backbone nodes. On level 3, the signal is transmitted via coaxial or fiber-optic cable to distribution nodes in the public streets. On level 4, the signal is transmitted via cable on private property to the end consumer.

p. 118 From 2000 to 2003, Deutsche Telekom, which emerged as the privatized monopolistic provider from Deutsche Bundespost, was forced by EU regulatory officials to sell parts of its cable network in levels 3 and 4 to companies like Kabel Deutschland and Kabel BW. In 2004, Kabel Deutschland planned to take over several competitors with the potential to gain nearly monopolistic power and therefore was stopped by regulatory offices. In 2005, the two regional cable network providers Ish (Nordrhein-Westfalen) and Iesy (Hessen) attempted a merger that was completed in 2007 under the new name Unitymedia. Through the acquisition of Tele Columbus West in 2007, Unitymedia became the second largest cable network provider after Kabel Deutschland. Kabel BW was third.

Kabel Deutschland offers cable TV, broadband Internet access, and telephone services in 13 of the 16 federal states in Germany, with a customer base of 8.7 million households in 2009. Unitymedia serves in the states of North Rhine-Westphalia and Hesse with a total of 4.5 million households. Kabel BW serves 2.3 million households in Baden-Württemberg. Tele Columbus serves 2.3 million and PrimaCom serves 850,000 households, mainly in eastern Germany.

Besides these major market participants there are several hundred small- to medium-sized companies offering cable TV services on a regional or city level (city-carriers), with customer bases ranging from 2,000 to 300,000. Some of the bigger city carriers are EWETel in Hamburg (Northern Germany), Net-Cologne (Middle Germany), and M-Net in Munich (Southern Germany). Like the large market participants, these companies offer triple play services (TV, Internet access, and telephone services).

German cable providers generated a total revenue of 3.6 billion € (US \$5.0 billion) in 2009 (Table 6.8). The main revenue source was TV access with 63% of total revenues. However, since 2007 the provision of broadband Internet access became a larger driving force of business. In 2008, the cable providers gained 710,000 (+ 79%) customers. In 2009, they gained 770,000 (+ 48%) customers in that segment.

Table 6-8. Revenues and Market Shares of Cable Platform Providers in Germany 2009–2011

| | Company Revenues 2009 (\$ billion) | Market Share By Revenue 2009 | Company Revenues 2011 (\$ billion) | Market Shares by Revenues 2011 (\$ billion) |
|--|---------------------------------------|---------------------------------|---------------------------------------|--|
| Kabel Deutschland | 2.1 | 47 | 2.0 | 45 |
| Unitymedia | 1.3 | 28 | 1.3 | 30 |
| Kabel BW | 0.7 | 16 | 0.8 | 17 |
| Tele Columbia | 0.3 | 6 | 0.3 | 6 |
| Medfort S à r.l (Primacon) ¹ | 0.1 | 3 | 0.1* | 2 |
| Total Revenues (\$US million) | 4,460 | | 4,480 | |
| C4 | | 97 | | 98 |
| HHI | | 3,294 | | 3,254 |
| N (>1%) | | 5 | | 5 |
| Noam | | 1,473 | | 1,455 |

Source: Solon Management Consultants“Wirtschaftsfaktor Kabel.” Solon Management Consultants. Last accessed on August 10, 2012 at <http://www.anga.de/media/file/10.Solon-Studie_Wirtschaftsfaktor_Kabel_final.pdf>. 2011 updates provided by editors

1 Primacon was bought by Medfort S à r.l in 2010.

p. 119 The German satellite TV platform provider market can be described as a duopoly between SES ASTRA and Eutelsat S.A. SES ASTRA is a full subsidiary of SES S.A., the worldwide leading provider of satellite communication services. In 2001, SES took over the satellite fleet of GE AMERICOM (General Electric). In the process of that acquisition, SES S.A. (SES Global) was founded as a holding company for the two satellite platform providers SES ASTRA and SES WORLD SKIES. The SES S.A. equities can be divided into class A and class B. Class A is owned by private investors. Class B is not publicly traded and is owned by the state of Luxembourg (or companies largely controlled by the state of Luxembourg).

Besides SES ASTRA, Eutelsat S.A. is the largest provider of satellite TV services in Germany and in all of Europe. With a fleet of 30 satellites, more than 4,000 TV channels, and 1,100 radio channels are transmitted to around 190 million households in Europe.³³ The holding company Eutelsat Communications S.A. owns 96.11% of the holding company; 3.89% is owned by other shareholders.³⁴

Information about exact market shares of satellite platform providers for DTH reception is not available through Kommission zur Ermittlung der Konzentration (KEK).³⁵ According to SES ASTRA,³⁶ the company served up to 17 million German households with satellite signals in 2007. SES ASTRA’s market dominance in the DTH segment explains Eutelsat’s significantly smaller market share. There are a relatively high number of so-called Dual-Feed-Antennas. These antennas receive TV signals from more than one orbital position. Also, cable providers use various satellite sources simultaneously to feed into their networks.

The German TV landscape is shaped by the dual system of public and private channels. Private TV channels were introduced after the liberalization of the TV market in the 1980s. The concentration in the German TV industry is high, but has declined since the start of the first two private channels, RTL and Sat.1, in 1984. Today, about 40% of the viewing time is spent on public channels and two TV groups dominate the private market: ProSiebenSat.1 Media AG and RTL Group.

The program offered by public stations is mainly financed by tax-like fees, collected by the state. Private stations are primarily financed by the advertising industry and are mostly free. Pay TV only has a small market share of about 8% in Germany. Concentration in the TV industry has been deduced from the concentration of viewing time, measured by the Gesellschaft für Konsumforschung (GfK)/Arbeitsgemeinschaft Fernsehforschung (AGF).³⁷ Since the advertising spending is allocated

according to the viewing time concentration, it is an adequate measurement of the market share. The ownership was assigned according to the annual reports of the Kommission zur Ermittlung der Konzentration (KEK).³⁸

The two major public channels in Germany are ARD and ZDF. License fees mainly finance them both, and their program mandate is governed by the Interstate Treaty on Broadcasting (Rundfunkstaatsvertrag).

On January 1, 1984, PKS, which was later renamed Sat.1, became the first private channel in Germany, followed by RTL one day later. This changed the monopoly of the public channels into a public-private mixed broadcasting system. The private channels were broadcast over cable and satellite only.

p. 120 In the first years after introducing private channels, their market share grew slowly. In 1988, private channels only had a market share of 9.9%. More and more households were connected to cable or satellite, thus making it possible to receive private channels. However, the quality of the private programming was low and viewers were used to the shows on the public channels.

This situation changed dramatically in the 1990s. In 1992 private channels had a market share of 39.3% and in 1996 a share of 56.2%. The number of channels increased and special interest channels were introduced. Also, new media companies entered the German TV market. While in 1992 all of the private channels belonged either to the Kirch Group (later ProSiebenSat.1) or RTL Group, by 2000 Télévision Française, News Corp, and Time Warner owned 2.7% of the German TV market. This number increased to 5.9% in 2007, while the market share of the large TV conglomerates ProSiebenSat.1 and RTL Group decreased to 20.8% and 25.3%, respectively. The market share of the public channels steadily decreased from 1985 until 1996. Since the year 2000, the market share has been stable at around 43%.

RTL Group is part of the worldwide media conglomerate of Bertelsmann AG. Bertelsmann holds 89.8% of the shares of RTL Group.³⁹ The remaining 10.2% is held by a diverse set of investors. The RTL Group is the largest TV and radio group in Europe, holding shares in 39 TV and 32 radio stations in ten countries, though the highest revenues come from the German stations.⁴⁰ RTL Group was founded in 2000 as a merger of CLT-UFA and Pearson TV. Bertelsmann became the major shareholder with 90% of the shares in 2001. German channels belonging to the RTL Group are RTL, RTL II, N-TV, VOX, RTL Living, RTL Crime, RTL Passion, and RTL Shop.

ProSiebenSat.1 Media AG holds shares in 24 free TV, 24 pay TV, and 22 radio networks in 13 European countries.⁴¹ The company was created in 2000 by the merger of Pro Sieben Media AG and Sat.1 Satelliten Fernsehen GmbH. Both were affiliated with the media conglomerate of Leo Kirch, an important figure in German TV. In 2002, Kirch went bankrupt. The US investor Haim Saban took over the majority of the shares of ProSiebenSat.1. In 2005, the publishing house Axel Springer intended to acquire ProSiebenSat.1, but the transaction was blocked by the Bundeskartellamt and KEK due to antitrust concerns. In 2006, Saban sold his stake to the American private equity firms Permira and KKR for about 3 billion €. Since 2008, 100% of the shares of the group have been held by Lavena Holdings 4 GmbH, which is owned by the two private equity companies KKR and Permira. Together with SBS Broadcasting Group, another investment of Permira and KKR, they hold significant investments in European media. German speaking channels of ProSiebenSat.1 Media are Sat.1, ProSieben, Kabel Eins, N24, 9Live, Sat.1 Comedy, and Kabel Eins Classic.

The C4 index decreased from 1985 to 2012. The HHI also strongly decreased from 1985 to 2012. The only increase can be detected from 1996 to 2000, probably caused by a change in regulation. After 1996, companies were allowed to hold a majority stake in more than one TV station, which had previously not been allowed. This facilitated mergers and acquisitions, although the change in the data is not very drastic (Table 6.9).

Table 6-9. National Market Shares of German Satellite and Cable TV Channels (%)¹

| | 1985 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2012 |
|---|------|------|------|------|------|------|------|------|
| Public Channels | 96.2 | 84.7 | 52.0 | 40.5 | 43.1 | 44.3 | 43.6 | 37.5 |
| ARD | 43.4 | 37.8 | 22.0 | 14.8 | 14.3 | 13.9 | 13.4 | 12.3 |
| ZDF | 42.6 | 36.2 | 22.0 | 14.4 | 13.3 | 13.6 | 12.9 | 12.6 |
| Other Public (Aggregate Regional) | 10.2 | 10.7 | 8.30 | 11.3 | 15.5 | 16.8 | 17.3 | 12.6 |
| ProSiebenSat.1 Media AG (formerly Kirch Group, now owned KKR/Permira) | | 5.8 | 22.6 | 27.4 | 26.2 | 21.9 | 20.8 | 20.2 |
| Sat.1 | | 5.8 | 13.1 | 13.2 | 10.2 | 10.3 | 9.6 | 9.4 |
| ProSieben | | | 6.5 | 9.5 | 8.2 | 7.0 | 6.5 | 5.9 |
| Kabel 1 | | | | 3.6 | 5.5 | 4.0 | 3.6 | 3.9 |
| DSF (* until 2003) | | | 3.0 | 1.1 | 1.2 | | | |
| N 24 | | | | | | 0.4 | 0.9 | 1.0 |
| Premiere (* 1997–2003) | | | | | 1.1 | | | |
| 9Live (* since 2001) | | | | | | 0.2 | 0.2 | - |
| RTL Group (formerly CLT/UFA, now Bertelsmann) | 0.4 | 4.1 | 16.7 | 26.6 | 24.7 | 25.6 | 25.3 | 25.1 |
| RTL | 0.4 | 4.1 | 16.7 | 17 | 14.3 | 13.8 | 12.4 | 12.3 |
| Super RTL, RTL II, VOX | | | | 9.6 | 10.4 | 11.3 | 12.2 | 11.9 |
| n-tv (* since 2002) | | | | | | 0.5 | 0.7 | 0.9 |
| Télévision Francaise (Bouygues, France) | | | | 1.2 | 1.0 | 0.9 | 1.0 | 0.7 |
| Eurosport | | | | 1.2 | 1.0 | 0.9 | 1.0 | 0.7 |
| Viacom (US) | | | | | | 1.4 | 1.8 | 1.5 |
| MTV, MTV2, Viva, Comedy Central, Nick | | | | | | 1.4 | 1.8 | 1.5 |
| EM.Sport Media | | | | | | 1.1 | 1.1 | 0.7 |
| DSF (* since 2005) | | | | | | 1.1 | 1.1 | 0.7 |
| News Corp (US/UK) | | | | | 1.0 | | | |
| 9Live (* 2000–2001) | | | | | 1.0 | | | |
| Investment Group Permira | | | | | | 2.4 | | |
| Premiere (*2003–2006) | | | | | | 2.4 | | |
| Ufa /Canal Plus France | | | | 0.7 | | | | |

| | | | | | | | | |
|---|-------|-------|-------|-------|--------|--------|--------|-------------|
| Premiere (* until 1997) | | | | | | | | 0.7 |
| Time Warner (US) | | | | | | | | 0.3 0.7 |
| n-tv (* until 2002) | | | | | | | | 0.3 0.7 |
| Tele-München | | | | | | | | 0.3 0.7 1.0 |
| Tele 5 | | | | | | | | 0.3 0.7 1.0 |
| Discovery Communications (US) | | | | | | | | 0.1 0.5 0.7 |
| DMAX | | | | | | | | 0.1 0.5 0.7 |
| MMW Minimovie World (REN Media Group, Lesnevsky Family, Russia) | | | | | | | | 0.8 0.2 |
| Das Vierte | | | | | | | | 0.8 0.2 |
| Other | 3.4 | 5.4 | 11.4 | 5.4 | 7.3 | 2 | 4.4 | 12.4 |
| Total Revenues (€ m) | 888 | 1,139 | 3,106 | 7,962 | 11,019 | 11,322 | 11,698 | |
| Total Revenues (\$ m) | | | | | 10,137 | 14,048 | 16,027 | 19,974 |
| C4 | 97 | 95 | 92 | 96 | 95 | 94 | 92 | 84.3 |
| HHI | 9,255 | 7,225 | 3,525 | 3,101 | 3,157 | 3,107 | 2,981 | 2,449 |
| N (>1%) | 2 | 6 | 8 | 12 | 11 | 14 | 12 | 9 |
| Noam | 6,544 | 4,171 | 2,035 | 1,266 | 1,289 | 1,036 | 994 | 816 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | |

1 All channels with an asterisk

* have changed their owner over time.

Video Portals

Based on the quantity of regular users and the intensity of videos being watched online, video portals represent one of the Internet's most popular features. Video portals sit on the fence between traditional television and the Internet. They allow users to publish their own content, and they provide other users with user-generated content usually at no charge.⁴²

p. 121 Video portals mainly derive their revenues from advertisements, which are either placed on ↴

p. 122 ↴

p. 123 ↴

their website or are integrated specifically into their hosted videos.⁴³ Hence, the respective market shares have been deducted from the monthly number of videos viewed. Google's video portal comprises YouTube and Google Video. Founded in February 2005, YouTube quickly gained brand awareness and market share. Google acquired YouTube in October 2006, and this acquisition helped Google significantly increase its overall market share. In 2006, Google Video amounted to roughly 8% market share.⁴⁴ In the following years, Google's video portals achieved a combined market share of 52.1% in 2008 and 48.3% in 2010. Hence, YouTube and Google Video are by far the biggest players in the German video portals market.

Megavideo had the second biggest market share in 2010. German users viewed over 200,000 videos hosted by this video portal in July 2010, resulting in a market share of less than 3% for Megavideo. ProSiebenSat1, with its video portals such as MyVideo.de, is the third biggest player in the German market. However, those video portals only account for a combined market share of less than 2%.

RTL Group's video portals such as Clipfish.de have an accumulated market share of less than 1% in 2010. Similar to the TV network ProSiebenSat1 mentioned above, the RTL Group publishes user-generated content and its own content on its video portals.

p. 124 The market includes other competitors such as the video portals from Yahoo and Microsoft. Both corporations entered the market rather late: in 2006 and 2007, respectively.⁴⁵ Furthermore, the market is characterized by a multiplicity of small- and medium-sized competitors such as ZDF Mediathek, AOL sites, and Vevo, as well as a high level of illegal and semi-legal video portals. The overall number of video portals in the market has increased continuously and is subject to certain volatility (Table 6.10).

Table 6-10. National Market Shares of Video Portals (%)

| | 2008 ¹ | 2010 ² |
|--|-------------------|-------------------|
| Google Sites (YouTube, Google Video) | 52.1 | 48.3 |
| Megavideo | 1.0 | 2.6 |
| ProSiebenSat1 Sites (MyVideo.de) | 1.5 | 1.2 |
| RTL Group Sites (Clipfish.de) | 1.1 | 0.6 |
| Microsoft Sites | 0.4 | 0.4 |
| Dailymotion.de | 0.2 | 0.3 |
| Yahoo Sites (Yahoo Video) | 0.3 | 0.1 |
| Others (e.g. AOL Sites, T-Online Sites, Vevo, ZDF Mediathek) | 43.4 | 46.6 |
| Sum of Total Market Shares | 100 | 100 |
| Total Revenues (€ m) | n.a. | n.a. |
| Total Revenues (\$ m) | n.a. | n.a. |
| C4 | 55.7 | 52.6 |
| HHI | 2,718 | 2,337 |
| Noam | 1,028 | 884 |

1 ComScore Video Metrix. *Comscore*. October 20, 2008. Last accessed on August 10, 2012 at <http://www.comscore.com/Press_Events/Press_Releases/2008/10/German_YouTube_Viewers>

2 ComScore Video Metrix. *Comscore*. September 14, 2010. Last accessed on August 10, 2012 at <http://www.comscore.com/Press_Events/Press_Releases/2010/9/Online-Video_Konsum_in_Deutschland_steigt_weiter_stark_an?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+comscore+%28comScore+Networks%29&utm_content=Google+Feedfetcher>

Besides Google's acquisition of YouTube, a major change in ownership did not occur in this comparably young and highly concentrated market.

p. 125 **Film**

The market for the production and distribution of film and television content is highly global. The respective German market has been dominated by large American companies. However, several predominantly German players have been able to maintain an aggregated market share of 21% to 38%.

The market shares were obtained from adjacent research that derived the respective market shares from the companies' revenues.^{46,47}

Other market participants include German and foreign companies such as Universum Film AG, Bavaria Film Gruppe, Brainpool TV GmbH, Endemol Gruppe, Constantin Film, Tobis, and MGM.

Besides the industry's major mergers and acquisitions mentioned above, several small market participants have been acquired by the big six German market players for the production and distribution of film and television content. The stagnating HHI between 560 and 856 implies a less concentrated market despite the seemingly dominant handful of big players in the market (Table 6.11).

Table 6-11. National Market Shares of Film and TV Production and Distribution (in %): 1984–2010

| | 1984 ¹ | 1989 | 1992 | 1996 ² | 2000 | 2004 | 2008 | 2010 ³ |
|---|-------------------|-------|-------|-------------------|-------|-------|-------|-------------------|
| Warner Bros. Entertainment (Time Warner, US) | 10.0 | 14.1 | 15.2 | 14.7 | 10.0 | 13.5 | 16.6 | 14.8 |
| Paramount Pictures (Viacom, US) | 14.0 | 11.3 | 8.8 | 11.6 | 10.0 | 9.5 | 13.9 | 13.2 |
| DreamWorks SKG | - | - | - | - | 8.0 | 11.1 | - | - |
| Twentieth Century Fox (21st Century Fox/Murdoch, US/UK) | 6.0 | 7.7 | 5.7 | 8.2 | 9.0 | 9.3 | 9.0 | 11.7 |
| Walt Disney Motion Pictures (US) | 9.0 | 11.1 | 11.0 | 14.2 | 13.0 | 9.7 | 10.2 | 11.1 |
| Miramax | 3.0 | 2.4 | 4.1 | - | - | - | - | - |
| Pixar Animation Studios | - | - | - | n.a. | n.a. | 1.6 | - | - |
| Marvel Entertainment | - | - | - | n.a. | 1.0 | 1.2 | 3.1 | - |
| Sony Pictures Entertainment (Japan/US) | - | - | 10.5 | 11.7 | 8.0 | 13.4 | 10.3 | 10.4 |
| Columbia Pictures | 8.0 | 9.8 | - | - | - | - | - | - |
| Tri-Star Pictures | 5.0 | - | - | - | - | - | - | - |
| Universal Pictures (US/France) | 7.0 | 10.5 | 13.3 | 12.1 | 13.0 | 9.1 | 12.8 | 9.7 |
| Other (MGM, Constantin Film, Tobis, etc.) | 38.0 | 33.1 | 31.4 | 27.5 | 28.0 | 21.6 | 24.1 | 29.1 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Total revenues (€ m) ^{4, 5, 6, 7} | 1,112 | 1,245 | 1,632 | 1,815 | 2,127 | 2,639 | 2,356 | 2,807 |
| Total revenues (\$ m) | | | | | 1,957 | 3,272 | 3,487 | 3,733 |
| C4 | 41 | 47 | 50 | 53 | 46 | 48 | 50 | 71 |
| HHI | 560 | 721 | 766 | 903 | 748 | 843 | 933 | 856 |
| <i>N</i> (>1%) | 8 | 7 | 7 | 6 | 8 | 9 | 7 | 6 |
| Noam | 198 | 273 | 289,5 | 369 | 265 | 281 | 353 | 349 |

1 (Frank 1993).

2 (Hachmeister and Rager 2003).

3 PricewaterhouseCoopers (2010).

4 Uka (2004).

5 Total revenue in € m for 1988.

6 Total revenue in € m for 1998.

7 Total revenue in € m for 2001.

Wireline Telecom

In 1998, the German market for voice telephony was completely liberalized. The former incumbent Deutsche Telekom was obliged to open its network infrastructure to new entrants and provide access to all customer lines, enabling interconnection, Local Loop Unbundling (LLU), number portability, and carrier preselection.

The calculation of market shares is based on the number of fixed network connections. The German regulator Bundesnetzagentur tracks the ratio between Deutsche Telekom and its competitors.⁴⁸ This analysis only includes providers of the direct subscriber lines,⁴⁹ not call-by-call or preselection service providers.

Deutsche Telekom AG evolved from the privatization of the Deutsche Bundespost after a reform in the German telecommunication and post system in 1995. With the liberalization of the market in 1998, new players emerged. The main competitors of Deutsche Telekom as providers of direct subscriber lines are Arcor (now Vodafone), and local and regional providers like EWE TEL, HanseNet, ISIS, M-Net, and NetCologne.

Since the liberalization of the fixed network market a lot of merger and acquisition activity could be observed. In 1999, Mannesmann/Arcor acquired the city carrier Isis (Dusseldorf).⁵⁰ In 2000, three city carriers (later 14 carriers) merged to become Tropolys.⁵¹ In 2004, Apax became the major shareholder in Tropolys.⁵² Apax acquired Versatel in 2005⁵³ and in 2006 Versatel and Tropolys merged to become Versatel.⁵⁴ In 2000, Vodafone acquired Arcor as part of the Mannesmann Corporation.⁵⁵ In 2003, Hansenet was acquired by Telecom Italia.⁵⁶

p. 126 Despite the liberalization, the German fixed network market is still dominated by the former monopolist, Deutsche Telekom,⁵⁷ although its competitors have gained market share as Deutsche Telekom struggled with poor performance. In 2000, Deutsche Telekom still held a market share of 98.3%. It decreased to 56.9% in 2013. The largest competitor is Arcor, with a market share of 7.4% in 2007. Since 1998, the C4 index has come down from 100 to 84.5. The HHI dropped from its maximum value of 10,000 to 3,542. The Noam index decreased from 10,000 to 1,584 in 2007 (Table 6.12).

Table 6-12. National Market Shares of German Fixed Network Providers (%)

| | 1984 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2009 | 2013 |
|---|--------|--------|--------|--------|--------|--------|--------|-------|-------|
| Deutsche Telekom | 100.0 | 100.0 | 100.0 | 100.0 | 98.3 | 92.2 | 82.9 | 70.0 | 56.9 |
| United Internet AG (1&1) | | | | | | | | 4.0 | 10.6 |
| Vodafone, (Arcor, UK) | | | | | 0.2 | 1.2 | 7.4 | 9.3 | 13.2 |
| Telefonica (O2, Spain) | | | | | | | | | 3.8 |
| Telecom Italia (Hansenet, Italy) | | | | | - | 0.6 | 3.4 | 2.8 | |
| Versatel (US) | | | | | - | 0.6 | 1.9 | 2.1 | 1.9 |
| Tropolys | | | | | 0.1 | | | | |
| EWE TEL (EWE AG, Austria) | | | | | - | 0.7 | 1.0 | | |
| NetCologne (GEW Köln AG) | | | | | - | 0.4 | 1.0 | | |
| Mnet (owned by several electricity providers) | | | | | - | 0.3 | 0.5 | | |
| Others | | | | | 1.4 | 4.0 | 1.9 | 11.8 | 13.6 |
| Total revenues (€ m) | - | 19,017 | 19,495 | 22,771 | 34,000 | 37,600 | 37,000 | | |
| Total revenues (\$ m) | | 22,210 | 25,312 | 29,375 | 31,280 | 46,624 | 50,690 | | |
| C4 | 100 | 100 | 100 | 100 | 99 | 95 | 93 | 88.2 | 84.5 |
| HHI | 10,000 | 10,000 | 10,000 | 10,000 | 9,663 | 8,520 | 6,948 | 5,015 | 3,542 |
| N (>1%) | 1 | 1 | 1 | 1 | 1 | 2 | 6 | 5 | 5 |
| Noam | 10,000 | 10,000 | 10,000 | 10,000 | 9,663 | 6,025 | 2,837 | 2,242 | 1,584 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | | |

Source: Market shares: Deutsche Telekom, Bundesnetzagentur. Market share competitors: press releases and annual reports of the telco companies listed (2000, 2004), VATM (2007). Total revenue: Annual reports of Deutsche Telekom (numbers for 1988–1996), VATM (numbers for 2000–2007). Sources for 2009 and 2013:

Quelle: <http://de.statista.com.eaccess.ub.tum.de/statistik/daten/studie/154194/umfrage/marktanteil-der-festnetzanbieter-gegen-festnetzkunden/>. 2009 and 2013 updates provided by editors.

Wireless Telecom

p. 127 In 2007, the penetration rate of mobile phone contracts had exceeded population. There were 96 million mobile users in a population of 82 million people.⁵⁸ Mobile services also started to threaten fixed line revenues. Many German households only started using their mobile phone connection. The concentration in this market is high, as there are only four mobile network providers.

The market shares were measured according to the number of customers. As mobile service has become a commodity, prices have dropped. This is an appropriate means of measuring market share. The analysis is restricted to mobile network operators. Mobile service providers and mobile virtual network operators are not included.

In 1989 the first private German license for mobile phone service was sold to Arcor D2 (later Vodafone). In 1992, the two providers, D1 (public) and D2 (private), started their service. In 1994 the third provider, E-plus, started its service, and in 1998 O2, formerly Viag Interkom, followed.

There are four players in the market: T-Mobile (formerly D1), Vodafone (formerly Arcor D2), E-Plus (KPN, Netherlands), and O2 [formerly Viag Interkom, now Telefonica (Spain)]. Since their entry, the market shares of the smaller players, E-Plus and O2, increased to 20.7% and 17%, respectively, by 2012.

The second largest player, D2 (later Vodafone), formerly belonged to Mannesmann, which was acquired by Vodafone in a spectacular hostile takeover in 2000. In 2002, the mobile division of Mannesmann was renamed VodafoneD2. With over 17 million customers, E-Plus is the third largest mobile provider in Germany. Since 2000, it has been owned by the Dutch KPN Group. O2 was a part of as Viag Interkom in 1998. Since 2006, it has been owned by the Spanish Telefónica, one of the largest telecommunication companies in the world.

The C4 index has remained constant over time, because there are only four players in the market. The HHI and the Noam index has steadily decreased since 1984. The introduction of E-plus in 1994 and O2 in 1998 lowered the concentration of ownership in the industry (Table 6.13).

Table 6-13. National Market Shares of German Mobile Network Operators (%)

| | 1992 | 1996 | 2000 | 2004 | 2008 | 2012 |
|---|-------|-------|--------|--------|--------|--------|
| Deutsche Telekom (T-Mobile, formerly D1) | 38.4 | 43.3 | 39.7 | 38.5 | 36.6 | 32.4 |
| Vodafone (formerly D2, UK) | 61.6 | 46.3 | 40 | 37.8 | 34.1 | 29.9 |
| E-Plus (Netherlands) | | 10.4 | 13.7 | 13.3 | 16.1 | 20.7 |
| Telefonica (Spain; O2 formerly Viag Interkom) | | | 6.6 | 10.4 | 13.2 | 17 |
| Total revenues (€ m) | 115 | 6,000 | 16,200 | 22,108 | 25,600 | 17,088 |
| Total revenues (\$ m) | 149 | 7,740 | 14,904 | 26,174 | 37,632 | 27,000 |
| C4 | 100 | 100 | 100 | 100 | 100 | 100 |
| HHI | 5,269 | 4,127 | 3,407 | 3,196 | 2,936 | 2,661 |
| N (>1%) | 2 | 3 | 4 | 4 | 4 | 4 |
| Noam | 3,726 | 2,383 | 1,704 | 1,598 | 1,469 | 1,330 |

Source: 2012 Minitel GMN Snapshot. 2012 update provided by editors. Mobile networks started on June 30, 1992 in Germany. Sources for market shares: Bundesnetzagentur, Annual reports of the mobile network operators. Sources for total revenue: VATM (number for 2008), Bundesnetzagentur (numbers for 2000, 2004), Solon (1996), estimation by the revenue of D2 (1992). No figure for revenue in 1992, because mobile telephony only started in June 1992 in Germany.

Telecommunications Media

Wireline Telecom

In 1998, the German market for voice telephony was completely liberalized. The former incumbent Deutsche Telekom was obliged to open its network infrastructure to new entrants and provide access to all customer lines, enabling interconnection, Local Loop Unbundling (LLU), number portability, and carrier preselection.

The calculation of market shares is based on the number of fixed network connections. The German regulator Bundesnetzagentur tracks the ratio between Deutsche Telekom and its competitors.⁴⁸ This analysis only includes providers of the direct subscriber lines,⁴⁹ not call-by-call or preselection service providers.

Deutsche Telekom AG evolved from the privatization of the Deutsche Bundespost after a reform in the German telecommunication and post system in 1995. With the liberalization of the market in 1998, new players emerged. The main competitors of Deutsche Telekom as providers of direct subscriber lines are Arcor (now Vodafone), and local and regional providers like EWE TEL, HanseNet, ISIS, M-Net, and NetCologne.

Since the liberalization of the fixed network market a lot of merger and acquisition activity could be observed. In 1999, Mannesmann/Arcor acquired the city carrier Isis (Dusseldorf).⁵⁰ In 2000, three city

carriers (later 14 carriers) merged to become Tropolys.⁵¹ In 2004, Apax became the major shareholder in Tropolys.⁵² Apax acquired Versatel in 2005⁵³ and in 2006 Versatel and Tropolys merged to become Versatel.⁵⁴ In 2000, Vodafone acquired Arcor as part of the Mannesmann Corporation.⁵⁵ In 2003, Hansenet was acquired by Telecom Italia.⁵⁶

p. 126 Despite the liberalization, the German fixed network market is still dominated by the former monopolist, Deutsche Telekom,⁵⁷ although its competitors have gained market share as Deutsche Telekom struggled with poor performance. In 2000, Deutsche Telekom still held a market share of 98.3%. It decreased to 56.9% in 2013. The largest competitor is Arcor, with a market share of 7.4% in 2007. Since 1998, the C4 index has come down from 100 to 84.5. The HHI dropped from its maximum value of 10,000 to 3,542. The Noam index decreased from 10,000 to 1,584 in 2007 (Table 6.12).

Table 6-12. National Market Shares of German Fixed Network Providers (%)

| | 1984 | 1988 | 1992 | 1996 | 2000 | 2004 | 2007 | 2009 | 2013 |
|---|--------|--------|--------|--------|--------|--------|--------|-------|-------|
| Deutsche Telekom | 100.0 | 100.0 | 100.0 | 100.0 | 98.3 | 92.2 | 82.9 | 70.0 | 56.9 |
| United Internet AG (1&1) | | | | | | | | 4.0 | 10.6 |
| Vodafone, (Arcor, UK) | | | | | 0.2 | 1.2 | 7.4 | 9.3 | 13.2 |
| Telefonica (O2, Spain) | | | | | | | | | 3.8 |
| Telecom Italia (Hansenet, Italy) | | | | | - | 0.6 | 3.4 | 2.8 | |
| Versatel (US) | | | | | - | 0.6 | 1.9 | 2.1 | 1.9 |
| Tropolys | | | | | 0.1 | | | | |
| EWE TEL (EWE AG, Austria) | | | | | - | 0.7 | 1.0 | | |
| NetCologne (GEW Köln AG) | | | | | - | 0.4 | 1.0 | | |
| Mnet (owned by several electricity providers) | | | | | - | 0.3 | 0.5 | | |
| Others | | | | | 1.4 | 4.0 | 1.9 | 11.8 | 13.6 |
| Total revenues (€ m) | - | 19,017 | 19,495 | 22,771 | 34,000 | 37,600 | 37,000 | | |
| Total revenues (\$ m) | | 22,210 | 25,312 | 29,375 | 31,280 | 46,624 | 50,690 | | |
| C4 | 100 | 100 | 100 | 100 | 99 | 95 | 93 | 88.2 | 84.5 |
| HHI | 10,000 | 10,000 | 10,000 | 10,000 | 9,663 | 8,520 | 6,948 | 5,015 | 3,542 |
| N (>1%) | 1 | 1 | 1 | 1 | 1 | 2 | 6 | 5 | 5 |
| Noam | 10,000 | 10,000 | 10,000 | 10,000 | 9,663 | 6,025 | 2,837 | 2,242 | 1,584 |
| Sum of total market shares | 100 | 100 | 100 | 100 | 100 | 100 | 100 | | |

Source: Market shares: Deutsche Telekom, Bundesnetzagentur. Market share competitors: press releases and annual reports of the telco companies listed (2000, 2004), VATM (2007). Total revenue: Annual reports of Deutsche Telekom (numbers for 1988–1996), VATM (numbers for 2000–2007). Sources for 2009 and 2013:

Quelle:<http://de.statista.com.eaccess.ub.tum.de/statistik/daten/studie/154194/umfrage/marktanteil-der-festnetzanbieter-gegen-festnetzkunden/>. 2009 and 2013 updates provided by editors.

Wireless Telecom

In 2007, the penetration rate of mobile phone contracts had exceeded population. There were 96 million mobile users in a population of 82 million people.⁵⁸ Mobile services also started to threaten fixed line revenues. Many German households only started using their mobile phone connection. The concentration in this market is high, as there are only four mobile network providers.

The market shares were measured according to the number of customers. As mobile service has become a commodity, prices have dropped. This is an appropriate means of measuring market share. The analysis is restricted to mobile network operators. Mobile service providers and mobile virtual network operators are not included.

In 1989 the first private German license for mobile phone service was sold to Arcor D2 (later Vodafone). In 1992, the two providers, D1 (public) and D2 (private), started their service. In 1994 the third provider, E-plus, started its service, and in 1998 O2, formerly Viag Interkom, followed.

There are four players in the market: T-Mobile (formerly D1), Vodafone (formerly Arcor D2), E-Plus (KPN, Netherlands), and O2 [formerly Viag Interkom, now Telefonica (Spain)]. Since their entry, the market shares of the smaller players, E-Plus and O2, increased to 20.7% and 17%, respectively, by 2012.

The second largest player, D2 (later Vodafone), formerly belonged to Mannesmann, which was acquired by Vodafone in a spectacular hostile takeover in 2000. In 2002, the mobile division of Mannesmann was renamed VodafoneD2. With over 17 million customers, E-Plus is the third largest mobile provider in Germany. Since 2000, it has been owned by the Dutch KPN Group. O2 was a part of as Viag Interkom in 1998. Since 2006, it has been owned by the Spanish Telefónica, one of the largest telecommunication companies in the world.

The C4 index has remained constant over time, because there are only four players in the market. The HHI and the Noam index has steadily decreased since 1984. The introduction of E-plus in 1994 and O2 in 1998 lowered the concentration of ownership in the industry (Table 6.13).

Table 6-13. National Market Shares of German Mobile Network Operators (%)

| | 1992 | 1996 | 2000 | 2004 | 2008 | 2012 |
|---|-------|-------|--------|--------|--------|--------|
| Deutsche Telekom (T-Mobile, formerly D1) | 38.4 | 43.3 | 39.7 | 38.5 | 36.6 | 32.4 |
| Vodafone (formerly D2, UK) | 61.6 | 46.3 | 40 | 37.8 | 34.1 | 29.9 |
| E-Plus (Netherlands) | | 10.4 | 13.7 | 13.3 | 16.1 | 20.7 |
| Telefonica (Spain; O2 formerly Viag Interkom) | | | 6.6 | 10.4 | 13.2 | 17 |
| Total revenues (€ m) | 115 | 6,000 | 16,200 | 22,108 | 25,600 | 17,088 |
| Total revenues (\$ m) | 149 | 7,740 | 14,904 | 26,174 | 37,632 | 27,000 |
| C4 | 100 | 100 | 100 | 100 | 100 | 100 |
| HHI | 5,269 | 4,127 | 3,407 | 3,196 | 2,936 | 2,661 |
| N (>1%) | 2 | 3 | 4 | 4 | 4 | 4 |
| Noam | 3,726 | 2,383 | 1,704 | 1,598 | 1,469 | 1,330 |

Source: 2012 Minitel GMN Snapshot. 2012 update provided by editors. Mobile networks started on June 30, 1992 in Germany. Sources for market shares: Bundesnetzagentur, Annual reports of the mobile network operators. Sources for total revenue: VATM (number for 2008), Bundesnetzagentur (numbers for 2000, 2004), Solon (1996), estimation by the revenue of D2 (1992). No figure for revenue in 1992, because mobile telephony only started in June 1992 in Germany.

Internet Media

Internet Service Providers (ISP)

Germany has the largest broadband market in Europe. After several years of strong market growth, the country has now entered a phase of consolidation, increased market competition, and saturation of demand for basic broadband access. Major ISPs are currently trying to move broadband services onto a new digital plane that allows service convergence by pushing ahead with cable network upgrades and VDSL deployments.

Until 2003, the market was largely dominated (90.9%) by Deutsche Telekom. Thereafter providers like Arcor (now Vodafone), Freenet, United Internet, or Versatel entered the market and took market shares of up to 49.4% in 2008. Exact data for market shares have not been available for all of the years between 2004 and 2012, but market participants did not change during the period. No major mergers or acquisitions took place (Tables 6.14, 6.15).

Table 6-14. Revenues of Internet Service Providers

| | 2005 | 2006 | 2007 | 2008 | 2009 |
|------------------------|------|------|------|-------|-------|
| Mobile (\$ bn) | 0,39 | 0,83 | 1,74 | 2,83 | 3,00 |
| Fixed (\$ bn) | 3,52 | 4,55 | 5,19 | 5,75 | 6,15 |
| Total revenues (\$ bn) | 4,79 | 6,57 | 8,85 | 11,28 | 11,62 |

Source: (PricewaterhouseCoopers 2010)

Table 6-15. Market Shares Stationary Broadband Internet Access (%)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2012 |
|-----------------------|------|------|------|------|------|------|-------|-------|-------|
| Deutsche Telekom | 97.0 | 92.0 | 90.9 | 82.7 | 61.0 | 49.2 | 48.6 | 50.6 | 45.6 |
| Arcor (Vodafone, UK) | | | | | | | 14.5 | 14.7 | 17.1 |
| 1&1 (United Internet) | | | | | | | 13.5 | 13.8 | 11.8 |
| Alice (Hansenet) | | | | | | | 12.8 | 11.5 | 9.4 |
| Freenet | | | | | | | 7.0 | 4.6 | - |
| Versatel (US) | | | | | | | 3.5 | 3.5 | - |
| Others | 3.0 | 8.0 | 9.1 | 17.3 | 39.0 | 50.8 | 0.1 | 1.3 | 16.1 |
| Total revenue (€ bn) | | | | | 3.52 | 4.55 | 5.19 | 5.75 | |
| Total revenue (\$ bn) | | | | | 4.39 | 5.72 | 7.11 | 8.46 | |
| C4 | | | | | | | 88.0 | 92.0 | 83.9 |
| HHI | | | | | | | 2,934 | 3,180 | 2,599 |
| <i>N</i> (>1%) | | | | | | | 6 | 6 | 4 |
| Noam | | | | | | | 1,198 | 1,298 | 1,300 |

Source: 2012: Statista. 2012, for updates provided by editors. Bundesnetzagentur *Jahresbericht 2011*, 77.

Search Engines

Search Engines classify web-based information and offer their users relevant information according to their search query in a systematic way. Search engines are widely used by individuals as a starting point to navigate through the Internet. The market shares were calculated from the respective search engine's amount of local search queries. Since search engines derive their revenue mainly from selling search advertising space, the amount of search queries is adequate for measuring their market shares^{59,60}

Google Inc., with its subsidiary Google Germany GmbH, is the dominant player in the German market for search engines. Founded in 1998, Google quickly became the market leader in Germany, outpacing well-established search engines like Yahoo or Altavista. Increasing its market share from almost 79% in 2004 to 90.5% in 2013, Google has achieved monopolistic status in the German search engine market (Table 6.16).

Table 6-16. National Market Shares of Search Engines (%): 2000–2013

| | 2000 ¹ | 2004 ² | 2008 ³ | 2010 ⁴ | 2013 |
|-----------------------------------|-------------------|-------------------|-------------------|-------------------|-------|
| Google (US) | 19.6 | 78.8 | 87.0 | 89.1 | 90.5 |
| Microsoft (US) | 6.2 | 4.3 | 1.8 | 3.3 | 3.2 |
| MSN Live Search | 6.2 | 4.3 | 1.8 | 0.2 | - |
| Bing | - | - | - | 3.1 | 3.2 |
| Yahoo (US) | 19.2 | 5.6 | 3.0 | 2.5 | 1.6 |
| Altavista | 6.7 | - | - | - | - |
| T-Online | - | 1.6 | 2.1 | 2.0 | 1.1 |
| Web.de | 7.6 | 0.3 | 0.5 | 0.5 | 0.7 |
| Lycos | 11.6 | 0.5 | 0.1 | - | - |
| Other | 29.1 | 8.9 | 5.5 | 2.6 | 2.9 |
| Sum of Total Market Shares | 100 | 100 | 100 | 100 | 100 |
| Total Revenues (€ m) ⁵ | n.a. | 110 ⁶ | 1,476 | 1,867 | 2,277 |
| Total Revenues (\$ m) | | 136 | 2,170 | 2,483 | 3,073 |
| C4 | 58.0 | 90.3 | 93.9 | 98.0 | 96.4 |
| HHI | 1,028 | 6,262 | 7,586 | 7,959 | 8,204 |
| <i>N</i> (>1%) | 7 | 5 | 5 | 5 | 5 |
| Noam | 389 | 2,800 | 3,393 | 3,559 | 3,669 |

Source: 2013 updates provided by editors

- 1 Wirtschaftsstandort Österreich (2011).
- 2 Luna-Park.de. (2007); Rentaseo.de (2005).
- 3 Peters, Berger, and Seitz (2010).
- 4 “Marktanteile von Suchmaschinen in Deutschland im April 2011.” *Statista.de*.
- 5 Bundesministerium für Wirtschaft und Technologie (2010).
- 6 “Der Online-Markt in Deutschland.” Suchmaschinenkompetenz.de. (2012).

Yahoo, with its subsidiary Yahoo Deutschland GmbH, entered the German market in 1996 and established a market share of roughly 20% in 2000. Due to Yahoo’s significant loss of market share in the intervening years, the company had a 2.5% share in the German market since 2010.

Microsoft launched its new search engine, Bing, in 2009. MSN Live Search, Microsoft’s former search engine, migrated to Bing’s search algorithm. Aggregating these search services, Microsoft achieved a 3% market share in 2010. Microsoft has replaced Yahoo as the second biggest player in the market.

The rest of the competition consists of several American companies such as ask.com and AOL, as well as some German search engines. However, these companies only reached a low individual market share in 2010. Furthermore, Google provides the underlying search algorithm for some of these companies.

Aside from the acquisition of Altavista by Yahoo’s subsidiary, Overture, in 2003, major changes in ownership did not occur. Originating from a moderately concentrated market with an HHI of 1,028 in 2000, the German market shows a significant increase in concentration during the intervening years. Despite the insolvency of Lycos Europe at the end of 2008⁶¹ and the launch of Microsoft’s Bing in 2009,⁶² the market remains highly concentrated with an HHI of 8,204 in 2013.

Online News

According to a survey by the Institut für Demoskopie Allensbach (IFD), since the year 2008 more than 50% of 20–30 years-old respondents consider the Internet their most important source of news.⁶³ The group gets its news from online news sites such as *Spiegel Online* or *Bild Online*.

The concentration of the news portals was calculated from the amount of visits measured by the organization Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (IVW). Since news portals derive their revenue streams mainly from advertisements, which are based on page impressions and therefore on visits, the number of visits of each news portal is an adequate measurement for the market share.

Bild Online is the biggest player in the news portal market of Germany, with 22% market share in 2010. As *Bild*'s online spin-off, this news portal is a complete subsidiary of Axel Springer AG. *Bild Online* also manages other Springer-owned websites such as *Computerbild.de*.

In 2010, *Bild Online* outpaced the long time market leader, *Spiegel Online*, by a small fraction. *Spiegel Online* publishes original content produced by its own editorial team as well as purchased content from news agencies. In addition to that, selected articles from the print edition are available online at no cost. In comparison to *Bild Online*, *Spiegel Online* focuses on high-quality, serious news.

There are a few additional players. *Chip Online*, the news portal with the third biggest market share, grew from its offline version *Chip Magazine* and focuses more on tech- and product-related news. Similar to *Chip Online*, *Heise Online* focuses on tech news and was the dominant news portal in 2000. However, *Heise Online* lost significant market share in the following decade and only amounts to roughly 4% market share in 2013. Hence, the common web surfer in the early days of the Internet appeared to be quite tech-savvy.

p. 130 Ownership and Concentration

In 2000, *Spiegel Online* and *Heise Online* dominated the market of news portals in Germany. However, the market share of *Heise Online* decreased sharply over the years and *Bild Online* became the second major player between 2004 and 2008. By 2010, *Bild Online* had become the market leader, leaving the former dominant news portal, *Spiegel Online*, behind. Notably, German newspapers such as *Die Welt* or *Süddeutsche Zeitung*, TV news channels such as N-TV, and magazines such as *Focus* entered the market, but were could not gain a dominant position in the news portal market (Table 6.17).

Table 6-17. National Market Shares of News Portals (%): 2000–2012¹

| | 2000 | 2004 | 2008 | 2010 ² | 2012 |
|--|-------|-----------------|------------------|-------------------|-------|
| Axel Springer | 9.5 | 14.9 | 21.5 | 26.6 | 30.2 |
| Bild Online | 9.5 | 14.9 | 16.3 | 22.3 | 25.5 |
| Welt Online | | | 5.2 | 4.3 | 4.7 |
| Bertelsmann | 5.5 | 10.5 | 7.2 | 6.4 | 6.1 |
| N-TV Online | 5.5 | 5.8 | 4.0 | 3.5 | 3.7 |
| Stern.de | | 4.7 | 3.2 | 2.9 | 2.4 |
| Burda | 18.3 | 15.1 | 13.9 | 11.4 | 12.0 |
| Chip Online | 8.4 | 7.9 | 9.4 | 7.4 | 7.6 |
| Focus Online | 9.9 | 7.2 | 4.5 | 4.0 | 5.4 |
| Spiegel Online (incl. Manager Magazin) | 19.9 | 24.8 | 22.5 | 21.6 | 19.1 |
| Kicker Online (Sports, Verlag Nürnberger Presse Druckhaus) | | | 6.6 | 5.0 | 4.9 |
| Süddeutsche.de | 3.3 | 3.1 | 4.0 | 4.2 | 4.0 |
| Heise Online (Heise Medien Gruppe) | 20.8 | 11.5 | 4.9 | 3.9 | 3.7 |
| N24 Online (ProSieben/Sat.1) | | 1.1 | 0.7 | 3.3 | 0.6 |
| FAZ.net | | 2.9 | 3.4 | 3.2 | 2.7 |
| PC-Welt (IDG Communications Media) | 4.8 | 3.9 | 2.9 | 1.6 | 1.4 |
| Others | 18.1 | 12.2 | 12.6 | 12.9 | 15.3 |
| Sum of Total Market Shares | 100 | 100 | 100 | 100 | |
| Total Revenues (€ m) | n.a. | 60 ³ | 268 ⁴ | 275 ⁵ | |
| Total Revenues (\$ m) | n.a. | 74 | 394 | 366 | |
| C4 | 68.4 | 66.3 | 64.4 | 66.0 | 67.4 |
| HHI | 1,315 | 1,341 | 1,313 | 1,428 | 1,521 |
| N (>1%) | 7 | 9 | 10 | 10 | 10 |
| Noam | 497 | 447 | 415 | 452 | 481 |

1 Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (2009).

2 "Besucher deutscher Nachrichtenportale 2010."

3 (Golz 2007).

4 Nielsen Media Research (2009, 17).

5 Nielsen Media Research (2011, 24).

Internet Portals

An Internet portal aggregates information from diverse sources in a unified way. Apart from the search engine standard, Internet portals offer other services such as e-mail, news, stock prices, educational entertainment, and other features. Internet portals provide a consistent look and feel with access control and procedures for multiple applications, which otherwise would have been different entities altogether (cf. Welfens et al. 2005, 97).

p. 131 The concentration of Internet portals was deduced from the number of unique visitors. Since Internet portals mainly derive their revenue streams from advertisements that are based on the reach, the amount of unique users per month or per year is an adequate measure for the market share. T-Online, a subsidiary of the Deutsche Telekom AG, is the all-time leader in the German Internet portal market with a market share of 28.3% in 2010. The second biggest player in the German market is *Web.de*, which is a fully owned subsidiary of United Internet. A popular service of *Web.de* is its free e-mail, FreeMail. In order to enhance the market power of online advertisement, *Web.de* founded AD Europe in 2004, which is a network of different Internet portals from over 60 countries. Yahoo operates the third largest Internet portal in Germany, with a market share 15% in 2010. Microsoft's Internet portal, *MSN.de*, the fourth biggest player in the German Internet portal market, had a 12.6% market share in 2010.

p. 132 While T-Online dominated the market for Internet portals in 2000, it outperformed its competitors only by a narrow margin in 2004 and 2008. United Internet AG, which was an Internet portal in the earlier days of the Internet, bought *Web.de* in 2005. Today it is the main competitor of T-Online. Therefore, the concentration of Internet portals in Germany decreased from 2000 to 2004. After 2004, the German market for Internet portals indicates a low level of volatility in its concentration, since the biggest players in the market generally maintain their respective market share. The market lacks notable market entries of novel players during the reviewed time frame. Lycos Europe went out of business in 2008, and the remaining players absorbed its market share (Table 6.18).

Table 6-18. National Market Shares of Internet Portals (%): 2000–2010¹

| | 2000 | 2004 | 2008 | 2010 ² |
|----------------------------|------------------|------------------|------------------|-------------------|
| T-Online | 31.0 | 19.5 | 19.6 | 28.3 |
| Web.de (United Internet) | 13.8 | 15.5 | 17.4 | 19.3 |
| Yahoo.de (US) | 17.2 | 12.8 | 15.2 | 15.1 |
| MSN (US) | 2.4 | 13.3 | 14.6 | 12.6 |
| GMX (United Internet) | 4.4 | 11.3 | 11.9 | 12.8 |
| Lycos Europe | 0.7 | 7.9 | 4.6 | |
| Others | 30.6 | 19.8 | 16.7 | 11.9 |
| Sum of total market shares | 100 | 100 | 100 | 100 |
| Total Revenues (€ m) | 300 ³ | 385 ⁴ | 655 ⁵ | 1080 ⁶ |
| Total Revenues (\$ m) | 276 | 462 | 963 | 1,436 |
| C4 | 66.3 | 61.1 | 66.8 | 75.4 |
| HHI | 1,470 | 1,150 | 1,294 | 1,722 |
| Noam | 600.2 | 469.5 | 528.2 | 770.3 |

1 “Internet Facts.” *Arbeitsgemeinschaft Online Forschung* (2001–2009).

2 “IVW Online Nutzungsdaten 02–2011.” (February 2011).

3 “Online-Werbeumsatz in Deutschland verdoppelt.” *Computerwoche.de*. (2011).

4 “Online-Report 2007/01.” (January 2007, 5).

5 Nielsen Media Research (2009, 17).

6 Nielsen Media Research (2011, 24).

Internet Media

Internet Service Providers (ISP)

Germany has the largest broadband market in Europe. After several years of strong market growth, the country has now entered a phase of consolidation, increased market competition, and saturation of demand for basic broadband access. Major ISPs are currently trying to move broadband services onto a new digital plane that allows service convergence by pushing ahead with cable network upgrades and VDSL deployments.

p. 128 Until 2003, the market was largely dominated (90.9%) by Deutsche Telekom. Thereafter, providers like Arcor (now Vodafone), Freenet, United Internet, or Versatel entered the market and took market shares of up to 49.4% in 2008. Exact data for market shares have not been available for all of the years between 2004 and 2012, but market participants did not change during the period. No major mergers or acquisitions took place (Tables 6.14, 6.15).

Table 6-14. Revenues of Internet Service Providers

| | 2005 | 2006 | 2007 | 2008 | 2009 |
|------------------------|------|------|------|-------|-------|
| Mobile (\$ bn) | 0,39 | 0,83 | 1,74 | 2,83 | 3,00 |
| Fixed (\$ bn) | 3,52 | 4,55 | 5,19 | 5,75 | 6,15 |
| Total revenues (\$ bn) | 4,79 | 6,57 | 8,85 | 11,28 | 11,62 |

Source: (PricewaterhouseCoopers 2010)

Table 6-15. Market Shares Stationary Broadband Internet Access (%)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2012 |
|-----------------------|------|------|------|------|------|------|-------|-------|-------|
| Deutsche Telekom | 97.0 | 92.0 | 90.9 | 82.7 | 61.0 | 49.2 | 48.6 | 50.6 | 45.6 |
| Arcor (Vodafone, UK) | | | | | | | 14.5 | 14.7 | 17.1 |
| 1&1 (United Internet) | | | | | | | 13.5 | 13.8 | 11.8 |
| Alice (Hansenet) | | | | | | | 12.8 | 11.5 | 9.4 |
| Freenet | | | | | | | 7.0 | 4.6 | - |
| Versatel (US) | | | | | | | 3.5 | 3.5 | - |
| Others | 3.0 | 8.0 | 9.1 | 17.3 | 39.0 | 50.8 | 0.1 | 1.3 | 16.1 |
| Total revenue (€ bn) | | | | | 3.52 | 4.55 | 5.19 | 5.75 | |
| Total revenue (\$ bn) | | | | | 4.39 | 5.72 | 7.11 | 8.46 | |
| C4 | | | | | | | 88.0 | 92.0 | 83.9 |
| HHI | | | | | | | 2,934 | 3,180 | 2,599 |
| <i>N</i> (>1%) | | | | | | | 6 | 6 | 4 |
| Noam | | | | | | | 1,198 | 1,298 | 1,300 |

Source: 2012: Statista. 2012, for updates provided by editors. Bundesnetzagentur *Jahresbericht 2011*, 77.

Search Engines

Search Engines classify web-based information and offer their users relevant information according to their search query in a systematic way. Search engines are widely used by individuals as a starting point to navigate through the Internet. The market shares were calculated from the respective search engine's amount of local search queries. Since search engines derive their revenue mainly from selling search advertising space, the amount of search queries is adequate for measuring their market shares^{59,60}

p. 129 Google Inc., with its subsidiary Google Germany GmbH, is the dominant player in the German market for search engines. Founded in 1998, Google quickly became the market leader in Germany, outpacing well-established search engines like Yahoo or Altavista. Increasing its market share from almost 79% in 2004 to 90.5% in 2013, Google has achieved monopolistic status in the German search engine market (Table 6.16).

Table 6-16. National Market Shares of Search Engines (%): 2000–2013

| | 2000 ¹ | 2004 ² | 2008 ³ | 2010 ⁴ | 2013 |
|-----------------------------------|-------------------|-------------------|-------------------|-------------------|-------|
| Google (US) | 19.6 | 78.8 | 87.0 | 89.1 | 90.5 |
| Microsoft (US) | 6.2 | 4.3 | 1.8 | 3.3 | 3.2 |
| MSN Live Search | 6.2 | 4.3 | 1.8 | 0.2 | - |
| Bing | - | - | - | 3.1 | 3.2 |
| Yahoo (US) | 19.2 | 5.6 | 3.0 | 2.5 | 1.6 |
| Altavista | 6.7 | - | - | - | - |
| T-Online | - | 1.6 | 2.1 | 2.0 | 1.1 |
| Web.de | 7.6 | 0.3 | 0.5 | 0.5 | 0.7 |
| Lycos | 11.6 | 0.5 | 0.1 | - | - |
| Other | 29.1 | 8.9 | 5.5 | 2.6 | 2.9 |
| Sum of Total Market Shares | 100 | 100 | 100 | 100 | 100 |
| Total Revenues (€ m) ⁵ | n.a. | 110 ⁶ | 1,476 | 1,867 | 2,277 |
| Total Revenues (\$ m) | | 136 | 2,170 | 2,483 | 3,073 |
| C4 | 58.0 | 90.3 | 93.9 | 98.0 | 96.4 |
| HHI | 1,028 | 6,262 | 7,586 | 7,959 | 8,204 |
| <i>N</i> (>1%) | 7 | 5 | 5 | 5 | 5 |
| Noam | 389 | 2,800 | 3,393 | 3,559 | 3,669 |

Source: 2013 updates provided by editors

- 1 Wirtschaftsstandort Österreich (2011).
- 2 Luna-Park.de. (2007); Rentaseo.de (2005).
- 3 Peters, Berger, and Seitz (2010).
- 4 “Marktanteile von Suchmaschinen in Deutschland im April 2011.” *Statista.de*.
- 5 Bundesministerium für Wirtschaft und Technologie (2010).
- 6 “Der Online-Markt in Deutschland.” Suchmaschinenkompetenz.de. (2012).

Yahoo, with its subsidiary Yahoo Deutschland GmbH, entered the German market in 1996 and established a market share of roughly 20% in 2000. Due to Yahoo’s significant loss of market share in the intervening years, the company had a 2.5% share in the German market since 2010.

Microsoft launched its new search engine, Bing, in 2009. MSN Live Search, Microsoft’s former search engine, migrated to Bing’s search algorithm. Aggregating these search services, Microsoft achieved a 3% market share in 2010. Microsoft has replaced Yahoo as the second biggest player in the market.

The rest of the competition consists of several American companies such as ask.com and AOL, as well as some German search engines. However, these companies only reached a low individual market share in 2010. Furthermore, Google provides the underlying search algorithm for some of these companies.

Aside from the acquisition of Altavista by Yahoo’s subsidiary, Overture, in 2003, major changes in ownership did not occur. Originating from a moderately concentrated market with an HHI of 1,028 in 2000, the German market shows a significant increase in concentration during the intervening years. Despite the insolvency of Lycos Europe at the end of 2008⁶¹ and the launch of Microsoft’s Bing in 2009,⁶² the market remains highly concentrated with an HHI of 8,204 in 2013.

Online News

According to a survey by the Institut für Demoskopie Allensbach (IFD), since the year 2008 more than 50% of 20–30 years-old respondents consider the Internet their most important source of news.⁶³ The group gets its news from online news sites such as *Spiegel Online* or *Bild Online*.

The concentration of the news portals was calculated from the amount of visits measured by the organization Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (IVW). Since news portals derive their revenue streams mainly from advertisements, which are based on page impressions and therefore on visits, the number of visits of each news portal is an adequate measurement for the market share.

Bild Online is the biggest player in the news portal market of Germany, with 22% market share in 2010. As *Bild*'s online spin-off, this news portal is a complete subsidiary of Axel Springer AG. *Bild Online* also manages other Springer-owned websites such as *Computerbild.de*.

In 2010, *Bild Online* outpaced the long time market leader, *Spiegel Online*, by a small fraction. *Spiegel Online* publishes original content produced by its own editorial team as well as purchased content from news agencies. In addition to that, selected articles from the print edition are available online at no cost. In comparison to *Bild Online*, *Spiegel Online* focuses on high-quality, serious news.

There are a few additional players. *Chip Online*, the news portal with the third biggest market share, grew from its offline version *Chip Magazine* and focuses more on tech- and product-related news. Similar to *Chip Online*, *Heise Online* focuses on tech news and was the dominant news portal in 2000. However, *Heise Online* lost significant market share in the following decade and only amounts to roughly 4% market share in 2013. Hence, the common web surfer in the early days of the Internet appeared to be quite tech-savvy.

p. 130 Ownership and Concentration

In 2000, *Spiegel Online* and *Heise Online* dominated the market of news portals in Germany. However, the market share of *Heise Online* decreased sharply over the years and *Bild Online* became the second major player between 2004 and 2008. By 2010, *Bild Online* had become the market leader, leaving the former dominant news portal, *Spiegel Online*, behind. Notably, German newspapers such as *Die Welt* or *Süddeutsche Zeitung*, TV news channels such as N-TV, and magazines such as *Focus* entered the market, but were could not gain a dominant position in the news portal market (Table 6.17).

Table 6-17. National Market Shares of News Portals (%): 2000–2012¹

| | 2000 | 2004 | 2008 | 2010 ² | 2012 |
|--|-------|-----------------|------------------|-------------------|-------|
| Axel Springer | 9.5 | 14.9 | 21.5 | 26.6 | 30.2 |
| Bild Online | 9.5 | 14.9 | 16.3 | 22.3 | 25.5 |
| Welt Online | | | 5.2 | 4.3 | 4.7 |
| Bertelsmann | 5.5 | 10.5 | 7.2 | 6.4 | 6.1 |
| N-TV Online | 5.5 | 5.8 | 4.0 | 3.5 | 3.7 |
| Stern.de | | 4.7 | 3.2 | 2.9 | 2.4 |
| Burda | 18.3 | 15.1 | 13.9 | 11.4 | 12.0 |
| Chip Online | 8.4 | 7.9 | 9.4 | 7.4 | 7.6 |
| Focus Online | 9.9 | 7.2 | 4.5 | 4.0 | 5.4 |
| Spiegel Online (incl. Manager Magazin) | 19.9 | 24.8 | 22.5 | 21.6 | 19.1 |
| Kicker Online (Sports, Verlag Nürnberger Presse Druckhaus) | | | 6.6 | 5.0 | 4.9 |
| Süddeutsche.de | 3.3 | 3.1 | 4.0 | 4.2 | 4.0 |
| Heise Online (Heise Medien Gruppe) | 20.8 | 11.5 | 4.9 | 3.9 | 3.7 |
| N24 Online (ProSieben/Sat.1) | | 1.1 | 0.7 | 3.3 | 0.6 |
| FAZ.net | | 2.9 | 3.4 | 3.2 | 2.7 |
| PC-Welt (IDG Communications Media) | 4.8 | 3.9 | 2.9 | 1.6 | 1.4 |
| Others | 18.1 | 12.2 | 12.6 | 12.9 | 15.3 |
| Sum of Total Market Shares | 100 | 100 | 100 | 100 | |
| Total Revenues (€ m) | n.a. | 60 ³ | 268 ⁴ | 275 ⁵ | |
| Total Revenues (\$ m) | n.a. | 74 | 394 | 366 | |
| C4 | 68.4 | 66.3 | 64.4 | 66.0 | 67.4 |
| HHI | 1,315 | 1,341 | 1,313 | 1,428 | 1,521 |
| N (>1%) | 7 | 9 | 10 | 10 | 10 |
| Noam | 497 | 447 | 415 | 452 | 481 |

1 Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (2009).

2 "Besucher deutscher Nachrichtenportale 2010."

3 (Golz 2007).

4 Nielsen Media Research (2009, 17).

5 Nielsen Media Research (2011, 24).

Internet Portals

An Internet portal aggregates information from diverse sources in a unified way. Apart from the search engine standard, Internet portals offer other services such as e-mail, news, stock prices, educational entertainment, and other features. Internet portals provide a consistent look and feel with access control and procedures for multiple applications, which otherwise would have been different entities altogether (cf. Welfens et al. 2005, 97).

p. 131 The concentration of Internet portals was deduced from the number of unique visitors. Since Internet portals mainly derive their revenue streams from advertisements that are based on the reach, the amount of unique users per month or per year is an adequate measure for the market share. T-Online, a subsidiary of the Deutsche Telekom AG, is the all-time leader in the German Internet portal market with a market share of 28.3% in 2010. The second biggest player in the German market is *Web.de*, which is a fully owned subsidiary of United Internet. A popular service of *Web.de* is its free e-mail, FreeMail. In order to enhance the market power of online advertisement, *Web.de* founded AD Europe in 2004, which is a network of different Internet portals from over 60 countries. Yahoo operates the third largest Internet portal in Germany, with a market share 15% in 2010. Microsoft's Internet portal, *MSN.de*, the fourth biggest player in the German Internet portal market, had a 12.6% market share in 2010.

p. 132 While T-Online dominated the market for Internet portals in 2000, it outperformed its competitors only by a narrow margin in 2004 and 2008. United Internet AG, which was an Internet portal in the earlier days of the Internet, bought *Web.de* in 2005. Today it is the main competitor of T-Online. Therefore, the concentration of Internet portals in Germany decreased from 2000 to 2004. After 2004, the German market for Internet portals indicates a low level of volatility in its concentration, since the biggest players in the market generally maintain their respective market share. The market lacks notable market entries of novel players during the reviewed time frame. Lycos Europe went out of business in 2008, and the remaining players absorbed its market share (Table 6.18).

Table 6-18. National Market Shares of Internet Portals (%): 2000–2010¹

| | 2000 | 2004 | 2008 | 2010 ² |
|----------------------------|------------------|------------------|------------------|-------------------|
| T-Online | 31.0 | 19.5 | 19.6 | 28.3 |
| Web.de (United Internet) | 13.8 | 15.5 | 17.4 | 19.3 |
| Yahoo.de (US) | 17.2 | 12.8 | 15.2 | 15.1 |
| MSN (US) | 2.4 | 13.3 | 14.6 | 12.6 |
| GMX (United Internet) | 4.4 | 11.3 | 11.9 | 12.8 |
| Lycos Europe | 0.7 | 7.9 | 4.6 | |
| Others | 30.6 | 19.8 | 16.7 | 11.9 |
| Sum of total market shares | 100 | 100 | 100 | 100 |
| Total Revenues (€ m) | 300 ³ | 385 ⁴ | 655 ⁵ | 1080 ⁶ |
| Total Revenues (\$ m) | 276 | 462 | 963 | 1,436 |
| C4 | 66.3 | 61.1 | 66.8 | 75.4 |
| HHI | 1,470 | 1,150 | 1,294 | 1,722 |
| Noam | 600.2 | 469.5 | 528.2 | 770.3 |

1 “Internet Facts.” *Arbeitsgemeinschaft Online Forschung* (2001–2009).

2 “IVW Online Nutzungsdaten 02–2011.” (February 2011).

3 “Online-Werbeumsatz in Deutschland verdoppelt.” *Computerwoche.de*. (2011).

4 “Online-Report 2007/01.” (January 2007, 5).

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Conclusion

Freedom of expression is guaranteed in Germany within the Constitution (Grundgesetz, Art.5). Due to the structure of German government, there are a variety of players on different levels. The central players in German audiovisual media policy are the political parties, especially the Länder organizations of the two large parties, the conservative CDU, and the social democratic SPD, which control much of the public broadcasting sector. After years of strong polarization from the 1950s to the 1970s, media policy is now again based on a broad consensus between the Länder. In an agreement between all Länder, the basics of a dual system of broadcasting have been put in place. It includes regulation for media concentration, stating that one company cannot control more than 30% of all TV ratings. The high degree of media concentration, especially the two “Senderfamilien,” is causing concern. The update of the Länder agreement, the Rundfunkstaatsvertrag, includes provisions for the EU television directive, especially the provision stating that important events such as the Olympic Games must be broadcast for free. The EU-wide Product Placement Permission (AVMS 2007) was introduced in 2009. In recent times, debates about the future of German public service broadcasting are increasingly influenced by decisions of and challenges to the EU. State subsidies do not exist within the print sector, nor in electronic media. However, a reduced value-added tax rate and reduced prices for distributing print products via mail serve as a state-generated support for the press.⁶⁴

p. 133

Besides horizontal concentration inside the specific segments, vertical integration and media convergence rose in the period after 2004. Examples include cable providers entering the market for broadband Internet access (triple play) or the growing acceptance of IPTV offers. These trends will make it harder for future studies to differentiate between content providers and distributor channels.

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Germany—Data Summaries

GERMANY IS ONE OF the largest media markets in Europe. One of its major firms—Bertelsmann—operates in many other countries through the publishing company Random House and the broadcaster RTL Group. Domestically, Bertelsmann holds 25% in both TV broadcasting and video channels. It is still one of the larger companies with 4.0% of the overall national market (Table 6.19). ProSiebenSat.1 (the second big private television network) holds significant market shares in Belgium, Sweden, and the Netherlands. ProSiebenSat.1 controls 30% of TV broadcasting and 20% of video channels. It is no longer owned by German investors but by two private equity firms, Permira (UK) and KKR (US). T-Mobile, the wireless arm of Deutsche Telekom, controls 20% of the wireless market in the United Kingdom directly and controls 34% indirectly as an equal shareholder with Orange (France Telecom) in their joint UK venture, EE. T-Mobile is also a major platform carrier in Central and Eastern Europe, and as T-Mobile USA holds approximately 12% of the large US wireless market.

Table 6-19. National Media Industries Concentration in Germany

| | 2004/5 | | 2011 or Most Recent | | % Change Annual Average | |
|-------------------------------|--------------------------------|--|--------------------------------|--|--------------------------------|--|
| | Company Power Index in Country | Company Share of the Overall National Media Market (%) | Company Power Index in Country | Company Share of the Overall National Media Market (%) | Company Power Index in Country | Company Share of the Overall National Media Market (%) |
| Deutsche Telekom (38% public) | 3,651 | 44.5 | 1,389 | 28.6 | -7.8 | -2.0 |
| Vodafone (UK) | 301 | 8.7 | 236 | 11.2 | 2.7 | 0.3 |
| Telefónica (Spain) | 22.2 | 2.2 | 59.2 | 4.7 | 20.8 | 0.3 |
| ARD (public) | 155.7 | 6 | 161.8 | 5.5 | 0.5 | 0.01 |
| Google (US) | 6.6 | 0.1 | 173.4 | 1.9 | 314.5 | 0.2 |
| ProSiebenSat.1 | 63.4 | 2.9 | 108.5 | 3.8 | 8.9 | 0.1 |
| Bertelsmann | 91.3 | 4.2 | 88.9 | 4.0 | -0.3 | -0.02 |
| Kabel Deutschland | 52.0 | 1.1 | 62.5 | 1.4 | 3.1 | 0.3 |
| E-Plus | 36.3 | 2.7 | 79.7 | 3.9 | 14.9 | 0.02 |
| ZDF (public) | 40.2 | 2.8 | 30.5 | 2.4 | -3.0 | -0.05 |
| Axel Springer | 30.0 | 1.8 | 21.6 | 1.5 | -3.5 | -0.04 |
| Unitymedia | 18.5 | 0.7 | 27.8 | 0.9 | 3.1 | 0.2 |
| Murdoch (US) | 2.7 | 0.3 | 24.4 | 1.1 | 102.2 | 0.1 |
| Bayern Funkpaket | 35.1 | 1.5 | 18.8 | 1.1 | -5.8 | -0.06 |
| Anderer | 0.0 | 0.0 | 16.6 | 2.4 | N/A | 0.3 |
| Bauer | 17.6 | 0.8 | 13.0 | 0.7 | -3.3 | -0.02 |
| Alice | 0.0 | 0.0 | 12.1 | 2.4 | N/A | 0.3 |
| Burda | 7.4 | 0.5 | 8.7 | 0.6 | 2.3 | 0.01 |
| Versatel (US) | 0.0 | 0.0 | 1.6 | 0.9 | N/A | 0.1 |
| Tele2 | 0.0 | 0.0 | 0.8 | 0.5 | N/A | 0.07 |
| Holtzbrinck | 0.7 | 0.3 | 0.7 | 0.3 | -0.2 | -0.002 |
| Freenet | 0.0 | 0.0 | 0.6 | 0.3 | N/A | 0.03 |
| Keine Angabe | 0.0 | 0.0 | 0.6 | 0.5 | N/A | 0.06 |
| Motorpresse | 0.4 | 0.1 | 0.4 | 0.1 | 0.5 | -0.001 |
| Bonnier (Sweden) | 0.4 | 0.2 | 0.3 | 0.1 | -0.9 | -0.001 |
| Discovery Communications (US) | 0.0 | 0.0 | 0.1 | 0.05 | N/A | 0.01 |
| Bouygues Group | 0.1 | 0.04 | 0.1 | 0.05 | 7.0 | 0.001 |
| Der Spiegel | 0.4 | 0.01 | 0.9 | 0.05 | 19.7 | 0.004 |

| Media Concentration Index | 2004/5 | 2011 or Most Recent | % Change Annual Average |
|--|---------|---------------------|-------------------------|
| Total Revenue: Nat'l Media Industry (US\$ mil) | 127,392 | 5,151 | 1.7 |
| Total Voices (<i>n</i>) | 83 | 80 | -0.5 |
| Net Voices (<i>n</i>) | 65 | 62 | -0.6 |
| Public Ownership (%) | 25.3 | 18.8 | -0.8 |
| Foreign Ownership (%) | 13.2 | 22.6 | 1.2 |
| C4 Average Weighted | 85.0 | 82.0 | -0.4 |
| HHI Average Weighted | 4,804 | 3,001 | -4.7 |
| C1 Average Weighted | 54 | 40 | -2 |
| Noam Index Average Weighted | 608 | 795 | 3.9 |
| Pooled Overall Sector C4 | 63.0 | 49.9 | -1.6 |
| Pooled Overall Sector HHI | 2,143 | 1,091 | -6.1 |
| Pooled Overall Sector Noam Index | 60 | 63 | 0.5 |
| Market Share of Top Ten Companies: Nat'l Media Industry (%) (Pooled C10) | 76.9 | 70.8 | -0.8 |
| National Power Index | 4,561 | 2,620 | -5.3 |

Germany's first and third channels provided by the regional public ARD broadcasting stations is federated, though not for linguistic reasons as it is in Switzerland and Belgium, but to conform to the constitutional requirement of the states' (Länder) media autonomy. Public broadcasting channels, both national and regional, account for 54.4% of broadcast TV.

ARD and ZDF are Germany's main public broadcasters. In addition to ARD's 25% share in both TV Broadcasting and video channel, the company also holds 36.5% of radio. ZDF holds a smaller, but still formidable 13.5% of radio, which shows the high degree of cross-ownership of content media in Germany.

p. 136 Concentration is declining overall in Germany because platform media have become a more competitive field: this largely accounts for ↪

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the fall in the national power index from 4,561 in 2004 to 2,620 in 2012. In Wireline and ISP platforms Deutsche Telekom has lost market shares to new companies. Before 2000, DT held 100% monopolies in both services, but its wireline share has fallen to 56.9% in 2012. Its ISP market share was at 45.6% and falling. DT's share of the overall platform market declined from 71.6% in 2004, when it was still effectively a fixed line monopolist, to 46.4% in 2012 due to new entrants like Alice, E-Plus, and Keine Angabe, as well as competition from established cable providers like Kabel Deutschland (Tables 6.20, 6.21).

Table 6-20. Top Content Media Companies in Germany

| | 2004/5 | | 2011 or Most Recent | | % Change Annual Average | |
|----------------------------------|--------------------------------|--|--------------------------------|--|--------------------------------|--|
| | Company Power Index in Country | Company Share of the National Content Media Market (%) | Company Power Index in Country | Company Share of the National Content Media Market (%) | Company Power Index in Country | Company Share of the National Content Media Market (%) |
| ARD (public) | 412 | 14.7 | 420 | 14.2 | 0.2 | -0.06 |
| Google (US) | 17.5 | 0.2 | 449 | 5.0 | 308.1 | 0.6 |
| ProSiebenSat.1 | 168 | 7.7 | 281 | 9.8 | 8.5 | 0.3 |
| Bertelsmann | 241 | 11.1 | 231 | 10.5 | -0.6 | -0.07 |
| ZDF (public) | 106.4 | 7.5 | 79.1 | 6.3 | -3.2 | 0.2 |
| Axel Springer | 79.4 | 4.8 | 56.1 | 4.0 | -3.7 | -0.1 |
| Kabel Deutschland | 45.4 | 1.0 | 3.5 | 1.2 | 3.1 | 0.3 |
| Bayern Funkpaket | 92.8 | 4.1 | 48.7 | 2.7 | -5.9 | -0.2 |
| Bauer | 46.6 | 2.2 | 33.8 | 1.8 | -3.4 | -0.05 |
| Burda | 19.4 | 1.4 | 22.6 | 1.5 | 2.0 | 0.01 |
| Murdoch (US) | 6.3 | 0.7 | 27.0 | 1.5 | 41.4 | 0.09 |
| Unitymedia | 16.1 | 0.6 | 23.8 | 0.8 | 5.9 | 0.2 |
| Holtzbrinck | 2.0 | 0.7 | 1.9 | 0.7 | -0.4 | -0.01 |
| Motorpresse | 1.1 | 0.3 | 1.0 | 0.3 | -0.7 | 2 |
| Vivendi (France) | 0.0 | 0.0 | 1.0 | 0.3 | N/A | 0.04 |
| Bonnier (Sweden) | 0.9 | 0.4 | 0.9 | 0.4 | -1.1 | -0.01 |
| Bouygues Group (France) | 0.2 | 0.1 | 0.2 | 0.12 | 6.6 | 0.003 |
| Discovery Communications (US) | 0.0 | 0.01 | 0.2 | 0.1 | 1,535.6 | 0.01 |
| Deutsche Telekom | 0.0 | 0.01 | 0.2 | 0.1 | 406.2 | 0.01 |
| Media Concentration Index | | | | | | |
| | 2004/5 | 2011 or Most Recent | % Change Annual Average | | | |
| Public Ownership (%) | 22.2 | 20.5 | -0.2 | | | |
| Foreign Ownership (%) | 6.0 | 12.4 | 0.8 | | | |
| C4 Average—Weighted | 67 | 71 | 0.4 | | | |
| HHI Average—Weighted | 1,937 | 2,257 | 2.1 | | | |
| C1 Average—Weighted | 22 | 27 | 0.01 | | | |
| National Power Index | 1,317 | 1,814 | 4.7 | | | |

Table 6-21. Top Platform Media Companies in Germany

| | 2004/5 | | 2011 or Most Recent | | % Change Annual Average | |
|----------------------------------|--------------------------------|---|--------------------------------|---|--------------------------------|---|
| | Company Power Index in Country | Company Share of the National Platform Media Market (%) | Company Power Index in Country | Company Share of the National Platform Media Market (%) | Company Power Index in Country | Company Share of the National Platform Media Market (%) |
| Deutsche Telekom | 5,873 | 71.6 | 2,261 | 46.4 | -7.7 | -3.1 |
| Vodafone (UK) | 485 | 14.0 | 384 | 18.2 | 2.6 | 0.5 |
| Telefónica (Spain) | 35.7 | 3.5 | 96.3 | 7.6 | 21.2 | 0.5 |
| E-Plus | 58.5 | 4.4 | 129.8 | 6.3 | 15.3 | 0.02 |
| Kabel Deutschland | 56.1 | 1.2 | 68.2 | 1.5 | 3.1 | 0.3 |
| Unitymedia | 19.9 | 0.7 | 30.3 | 1.0 | 3.1 | 0.2 |
| Anderer | 0.0 | 0.0 | 27.1 | 3.9 | N/A | 0.5 |
| Murdoch (US) | 0.5 | 0.1 | 22.8 | 0.9 | 593.8 | 0.1 |
| Alice | 0.0 | 0.0 | 19.7 | 3.8 | N/A | 0.5 |
| Versatel (US) | 0.0 | 0.0 | 2.7 | 1.4 | N/A | 0.2 |
| Tele2 | 0.0 | 0.0 | 1.3 | 0.9 | N/A | 0.1 |
| Freenet | 0.0 | 0.0 | 1.0 | 0.4 | N/A | 0.06 |
| Keine Angabe | 0.0 | 0.0 | 1.0 | 0.7 | N/A | 0.1 |
| Media Concentration Index | | | | | | |
| | 2004/5 | 2011 or Most Recent | % Change Annual Average | | | |
| Public Ownership (%) | 27.2 | 17.7 | -1.2% | | | |
| Foreign Ownership (%) | 17.6 | 9.0 | 1.4% | | | |
| C4 Average—Weighted | 96 | 90 | -8% | | | |
| HHI Average—Weighted | 6,548 | 3,468 | -5.9 | | | |
| C1 Average—Weighted | 73 | 48 | -3% | | | |
| National Power Index | 6,535 | 3,126 | -6.5% | | | |

GERMANY IS ONE OF the largest media markets in Europe. One of its major firms—Bertelsmann—operates in many other countries through the publishing company Random House and the broadcaster RTL Group. Domestically, Bertelsmann holds 25% in both TV broadcasting and video channels. It is still one of the larger companies with 4.0% of the overall national market (Table 6.19). ProSiebenSat.1 (the second big private television network) holds significant market shares in Belgium, Sweden, and the Netherlands. ProSiebenSat.1 controls 30% of TV broadcasting and 20% of video channels. It is no longer owned by German investors but by two private equity firms, Permira (UK) and KKR (US). T-Mobile, the wireless arm of Deutsche Telekom, controls 20% of the wireless market in the United Kingdom directly and controls 34% indirectly as an equal shareholder with Orange (France Telecom) in their joint UK venture, EE. T-Mobile is also a major platform carrier in Central and Eastern Europe, and as T-Mobile USA holds approximately 12% of the large US wireless market.

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| ARD (public) | 155.7 | 6 | 161.8 | 5.5 | 0.5 | 0.01 |
| Google (US) | 6.6 | 0.1 | 173.4 | 1.9 | 314.5 | 0.2 |
| ProSiebenSat.1 | 63.4 | 2.9 | 108.5 | 3.8 | 8.9 | 0.1 |
| Bertelsmann | 91.3 | 4.2 | 88.9 | 4.0 | -0.3 | -0.02 |
| Kabel Deutschland | 52.0 | 1.1 | 62.5 | 1.4 | 3.1 | 0.3 |
| E-Plus | 36.3 | 2.7 | 79.7 | 3.9 | 14.9 | 0.02 |
| ZDF (public) | 40.2 | 2.8 | 30.5 | 2.4 | -3.0 | -0.05 |
| Axel Springer | 30.0 | 1.8 | 21.6 | 1.5 | -3.5 | -0.04 |
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| Murdoch (US) | 2.7 | 0.3 | 24.4 | 1.1 | 102.2 | 0.1 |
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| Versatel (US) | 0.0 | 0.0 | 1.6 | 0.9 | N/A | 0.1 |
| Tele2 | 0.0 | 0.0 | 0.8 | 0.5 | N/A | 0.07 |
| Holtzbrinck | 0.7 | 0.3 | 0.7 | 0.3 | -0.2 | -0.002 |
| Freenet | 0.0 | 0.0 | 0.6 | 0.3 | N/A | 0.03 |
| Keine Angabe | 0.0 | 0.0 | 0.6 | 0.5 | N/A | 0.06 |
| Motorpresse | 0.4 | 0.1 | 0.4 | 0.1 | 0.5 | -0.001 |
| Bonnier (Sweden) | 0.4 | 0.2 | 0.3 | 0.1 | -0.9 | -0.001 |
| Discovery Communications (US) | 0.0 | 0.0 | 0.1 | 0.05 | N/A | 0.01 |
| Bouygues Group | 0.1 | 0.04 | 0.1 | 0.05 | 7.0 | 0.001 |
| Der Spiegel | 0.4 | 0.01 | 0.9 | 0.05 | 19.7 | 0.004 |

| Media Concentration Index | 2004/5 | 2011 or Most Recent | % Change Annual Average |
|--|---------|---------------------|-------------------------|
| Total Revenue: Nat'l Media Industry (US\$ mil) | 127,392 | 5,151 | 1.7 |
| Total Voices (<i>n</i>) | 83 | 80 | -0.5 |
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| C1 Average Weighted | 54 | 40 | -2 |
| Noam Index Average Weighted | 608 | 795 | 3.9 |
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| Pooled Overall Sector HHI | 2,143 | 1,091 | -6.1 |
| Pooled Overall Sector Noam Index | 60 | 63 | 0.5 |
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| National Power Index | 4,561 | 2,620 | -5.3 |

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p. 136 Concentration is declining overall in Germany because platform media have become a more competitive field: this largely accounts for ↪

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Table 6-20. Top Content Media Companies in Germany

| | 2004/5 | | 2011 or Most Recent | | % Change Annual Average | |
|----------------------------------|--------------------------------|--|--------------------------------|--|--------------------------------|--|
| | Company Power Index in Country | Company Share of the National Content Media Market (%) | Company Power Index in Country | Company Share of the National Content Media Market (%) | Company Power Index in Country | Company Share of the National Content Media Market (%) |
| ARD (public) | 412 | 14.7 | 420 | 14.2 | 0.2 | -0.06 |
| Google (US) | 17.5 | 0.2 | 449 | 5.0 | 308.1 | 0.6 |
| ProSiebenSat.1 | 168 | 7.7 | 281 | 9.8 | 8.5 | 0.3 |
| Bertelsmann | 241 | 11.1 | 231 | 10.5 | -0.6 | -0.07 |
| ZDF (public) | 106.4 | 7.5 | 79.1 | 6.3 | -3.2 | 0.2 |
| Axel Springer | 79.4 | 4.8 | 56.1 | 4.0 | -3.7 | -0.1 |
| Kabel Deutschland | 45.4 | 1.0 | 3.5 | 1.2 | 3.1 | 0.3 |
| Bayern Funkpaket | 92.8 | 4.1 | 48.7 | 2.7 | -5.9 | -0.2 |
| Bauer | 46.6 | 2.2 | 33.8 | 1.8 | -3.4 | -0.05 |
| Burda | 19.4 | 1.4 | 22.6 | 1.5 | 2.0 | 0.01 |
| Murdoch (US) | 6.3 | 0.7 | 27.0 | 1.5 | 41.4 | 0.09 |
| Unitymedia | 16.1 | 0.6 | 23.8 | 0.8 | 5.9 | 0.2 |
| Holtzbrinck | 2.0 | 0.7 | 1.9 | 0.7 | -0.4 | -0.01 |
| Motorpresse | 1.1 | 0.3 | 1.0 | 0.3 | -0.7 | 2 |
| Vivendi (France) | 0.0 | 0.0 | 1.0 | 0.3 | N/A | 0.04 |
| Bonnier (Sweden) | 0.9 | 0.4 | 0.9 | 0.4 | -1.1 | -0.01 |
| Bouygues Group (France) | 0.2 | 0.1 | 0.2 | 0.12 | 6.6 | 0.003 |
| Discovery Communications (US) | 0.0 | 0.01 | 0.2 | 0.1 | 1,535.6 | 0.01 |
| Deutsche Telekom | 0.0 | 0.01 | 0.2 | 0.1 | 406.2 | 0.01 |
| Media Concentration Index | | | | | | |
| | 2004/5 | 2011 or Most Recent | % Change Annual Average | | | |
| Public Ownership (%) | 22.2 | 20.5 | -0.2 | | | |
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| HHI Average—Weighted | 1,937 | 2,257 | 2.1 | | | |
| C1 Average—Weighted | 22 | 27 | 0.01 | | | |
| National Power Index | 1,317 | 1,814 | 4.7 | | | |

Table 6-21. Top Platform Media Companies in Germany

| | 2004/5 | | 2011 or Most Recent | | % Change Annual Average | |
|--------------------|--------------------------------|---|--------------------------------|---|--------------------------------|---|
| | Company Power Index in Country | Company Share of the National Platform Media Market (%) | Company Power Index in Country | Company Share of the National Platform Media Market (%) | Company Power Index in Country | Company Share of the National Platform Media Market (%) |
| Deutsche Telekom | 5,873 | 71.6 | 2,261 | 46.4 | -7.7 | -3.1 |
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| E-Plus | 58.5 | 4.4 | 129.8 | 6.3 | 15.3 | 0.02 |
| Kabel Deutschland | 56.1 | 1.2 | 68.2 | 1.5 | 3.1 | 0.3 |
| Unitymedia | 19.9 | 0.7 | 30.3 | 1.0 | 3.1 | 0.2 |
| Anderer | 0.0 | 0.0 | 27.1 | 3.9 | N/A | 0.5 |
| Murdoch (US) | 0.5 | 0.1 | 22.8 | 0.9 | 593.8 | 0.1 |
| Alice | 0.0 | 0.0 | 19.7 | 3.8 | N/A | 0.5 |
| Versatel (US) | 0.0 | 0.0 | 2.7 | 1.4 | N/A | 0.2 |
| Tele2 | 0.0 | 0.0 | 1.3 | 0.9 | N/A | 0.1 |
| Freenet | 0.0 | 0.0 | 1.0 | 0.4 | N/A | 0.06 |
| Keine Angabe | 0.0 | 0.0 | 1.0 | 0.7 | N/A | 0.1 |

| Media Concentration Index | 2004/5 | 2011 or Most Recent | % Change Annual Average |
|---------------------------|--------|---------------------|-------------------------|
| Public Ownership (%) | 27.2 | 17.7 | -1.2% |
| Foreign Ownership (%) | 17.6 | 9.0 | 1.4% |
| C4 Average—Weighted | 96 | 90 | -8% |
| HHI Average—Weighted | 6,548 | 3,468 | -5.9 |
| C1 Average—Weighted | 73 | 48 | -3% |
| National Power Index | 6,535 | 3,126 | -6.5% |

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