Berlin

the place to be for business

10 reasons to choose Berlin

BUSINESS
Modern metropolis with strong opportunities for growth

INFRASTRUCTURE
Central transportation hub with ideal access

DECISION MAKERS
Meet people in politics, business and media

RECRUITMENT
Select from a qualified pool of talent

SCIENCE
Excellent cooperation between research and academic institutions

IREAL ESTATE
First-class office space in central locations

EVENTS
International meeting place for new business contacts

QUALITY OF LIFE
Attractive place to live thanks to cultural diversity

COSMOPOLITAN
Welcoming climate for international business

TRENDS FOR THE FUTURE
Creative impulses for innovative companies

Location Berlin

Business

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Leading location for multinational companies

Berlin is a dynamic metropolis for service and technology. The city is home to a mix of large and small enterprises, from cutting-edge technologies and modernized industry

Broad spectrum of well-known companies:

- Location for international market leaders like *Bayer HealthCare*
- Home to worldwide drivers of technology & innovation *like Amazon*
- Global IT and telecommunications groups like O2
- German companies with long-standing traditions like *BMW und Siemens*
- Successful medium-sized enterprises *like Biotronik*

Top location for managers

- **Europe's** best business promotion strategy
- **Attractive mix** of integral location factors for investors
- **Important political** and **cultural center** in Europe
- **Central location** with easy access to European markets
- **Modern infrastructure** for IT, research and transportation
- **Technology-based clusters with strong potential for growth**
- **Great potential for skilled specialists** because of the international higher education landscape

Quelle: Foreign Direct Investment Magazine: European Cities and Regions of the Future 2012/2013 (Feb/März 2012), Cushman & Wakefield (C&W): European Cities Monitor, 23. Aufl.(Okt 2011), BLC (Dez 2012)

The highest growth in Germany

NEW AND EXPANDED COMPANIES
2012

162

NEWLY CREATED JOBS
2012

5.313

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- **Strongest region of growth** in Germany
- Germany's most popular **university city**
- Excellent track record as an **investment location** in Europe
- Leader in **foreign direct investment**
- **Active steps taken to encourage** companies **to open operations here**
- Successful **economic and business development**

Quelle: IHK Berlin (2012), Foreign Direct Investment Magazine: European Cities and Regions of the Future 2012/2013 (Feb/März 2012), BLC (Dez 2012), Berlin Partner für Wirtschaft und Technologie GmbH

European Silicon Valley

NEW COMPANIES FOUNDED
2011

44.267

EMPLOYEES
In the leading creative sector

220.000

REVENUE
in IT and the media

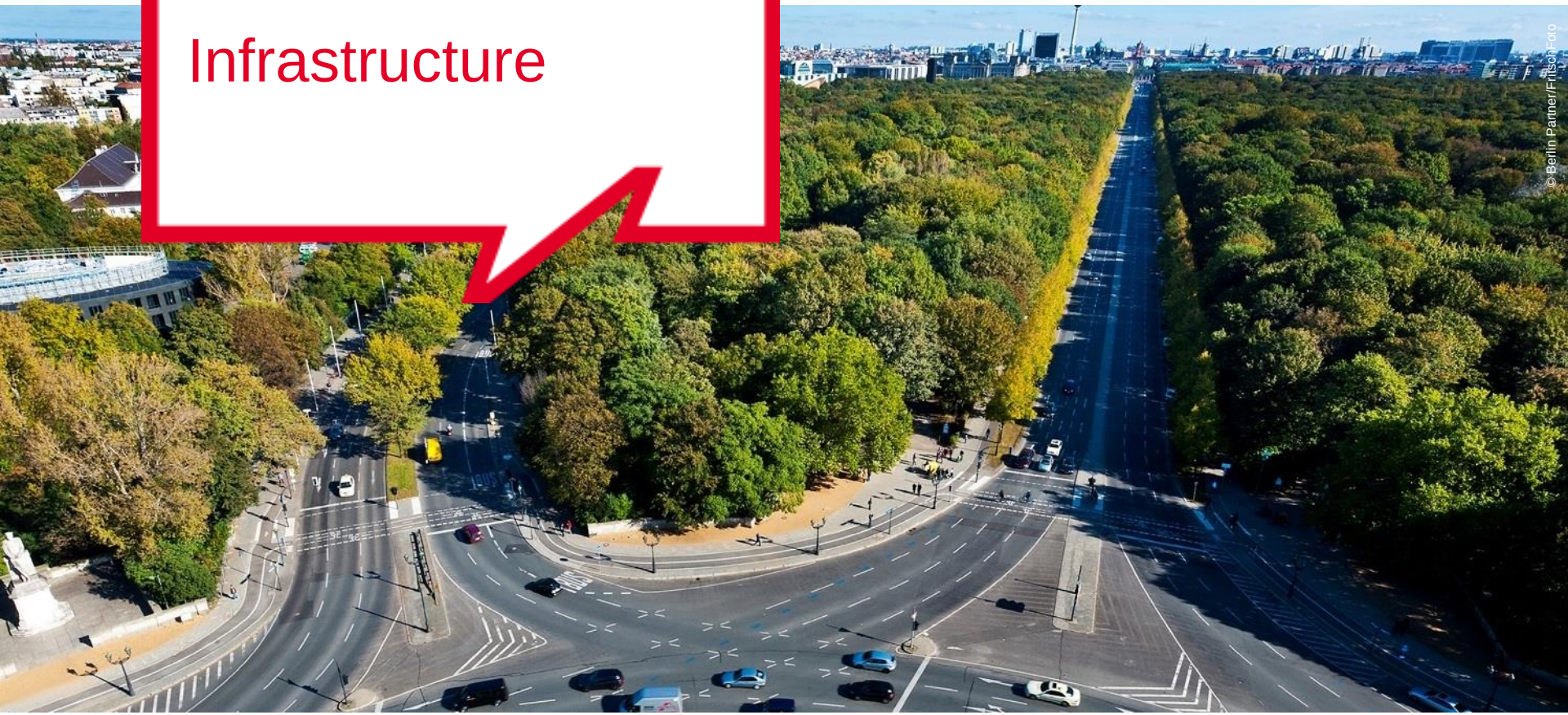
21 Mrd. €

- Dynamic process of becoming **Europe's Silicon Valley**
- Germany's capital for **start-ups**
- **Creative sector** as an important economic factor
- **Stronghold** in the **IT and media** sector
- Fast-growing start-up scene and and successful infrastructure for funding and financing **generate optimism**

Quelle: IHK Berlin, Medienboard Berlin-Brandenburg GmbH, Senatsverwaltung für Wirtschaft, Technologie und Forschung

Location Berlin

Infrastructure



Europe’s most modern airport

TRAVEL TIME
from BER to the Berlin city center

30 min.

- **Europe’s most modern airport**
- **Flexible capacity** for 27 million passengers each year
- **International magnet** for investors
- **Ideal conditions for opening businesses** in direct proximity to airport
- **Large variety in space** and excellent infrastructure for logistics
- **Quick travel time** from the airport and its surroundings to the Berlin city center

Quelle: Flughafen Berlin Brandenburg GmbH (Dez 2012)

Largest junction train station in Europe

TRAVELERS
Per day: up to
300.000

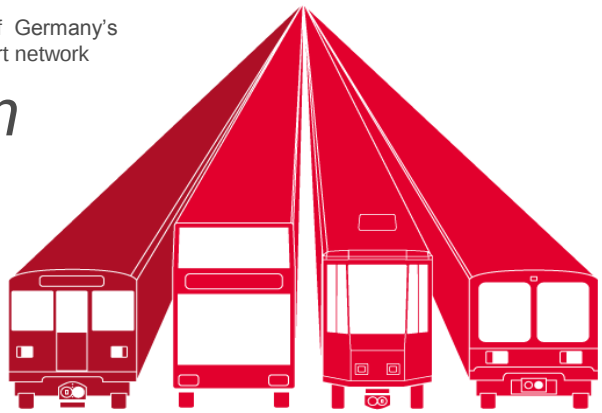
- **Modern junction station** with room for growth
- Close **proximity to the government quarter** and political institutions
- **Quick, direct connections** to European capitals
- A wide variety of **commercial space** at the train station
- **Popular** shopping **destination**

Quelle: Berliner Hauptbahnhof GbR (Dez 2012)

Germany’s best public transport network

TOTAL DISTANCE of Germany’s largest public transport network

2.447 km



S-Bahn-Netz
332 km

Straßenbahn-Netz
294 km

Bus- und Schnellbus-Netz
1.675 km

U-Bahn-Netz
146 km

- Germany’s **largest public transport network**
- **Fast tracks through the city** and **high mobility** for commuters and tourists
- The country’s **most comprehensive subway net (U-Bahn)**
- **Efficient commuter train (S-Bahn) network**
  for regional connections
- **Dependable tram network**
  for traffic jam-free travel
- **Expansive bus network** as the city’s flexible wheels

Quelle: Berliner Verkehrsbetriebe, S-Bahn Berlin GmbH, Verkehrsverbund Berlin-Brandenburg, Business Location Center

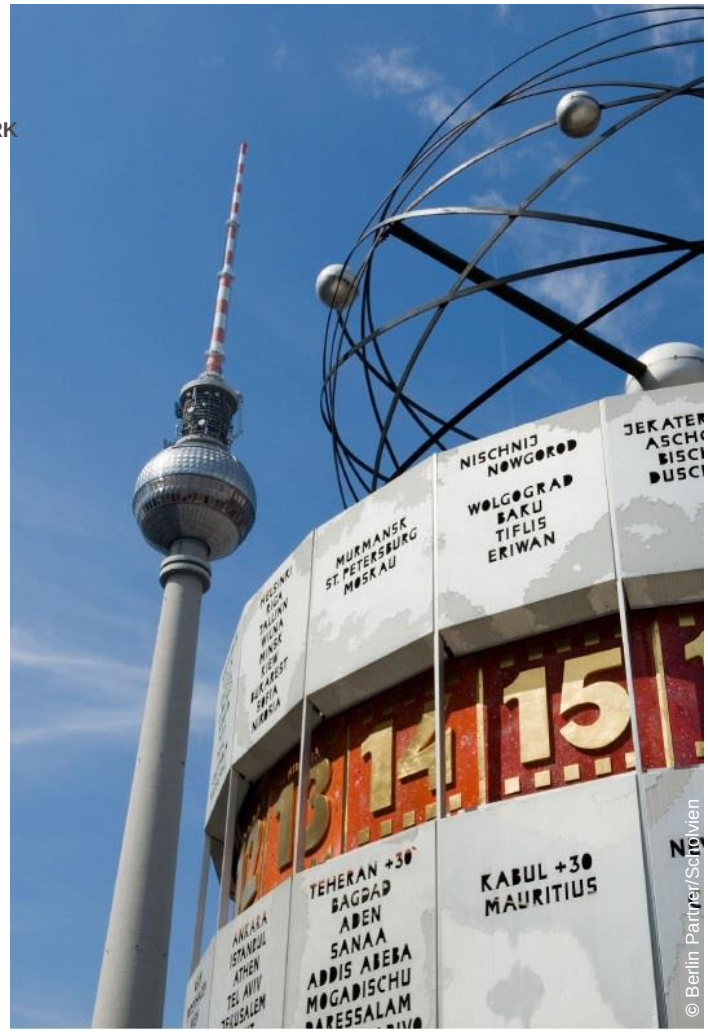
Germany’s first fully digital city

BROADBAND NETWORK
DSL connections, more than

1,4 Mio.

WIRELESS LAN HOTSPOTS Within the city, more than

1.000



- Germany’s **first fully digital city**
- Longest **digital communication network** in Germany
- Europe’s largest **comprehensive broadband distribution net**
- **High-speed connections** with ADSL and VDSL
- **Flexible** mobility in Germany’s WLAN capital

Quelle: Projekt Zukunft (2010)

Location Berlin

Decision Makers

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Germany’s largest city

RESIDENTS
in Berlin (2011)

3,5 Mio.

NEW RESIDENTS
since the Berlin Wall fell in 1989

1,7 Mio.

NEW RESIDENTS IN BERLIN in 2011

158.800

- **Modern capital** with Europe’s largest national economy
- **Second largest city in the European Union** after London
- Germany’s largest and **most populous** city
- **9x more city area** than Paris and ample resources
- **Continually growing metropolis** in both economy and population

Quelle: Amt für Statistik Berlin-Brandenburg (2011)

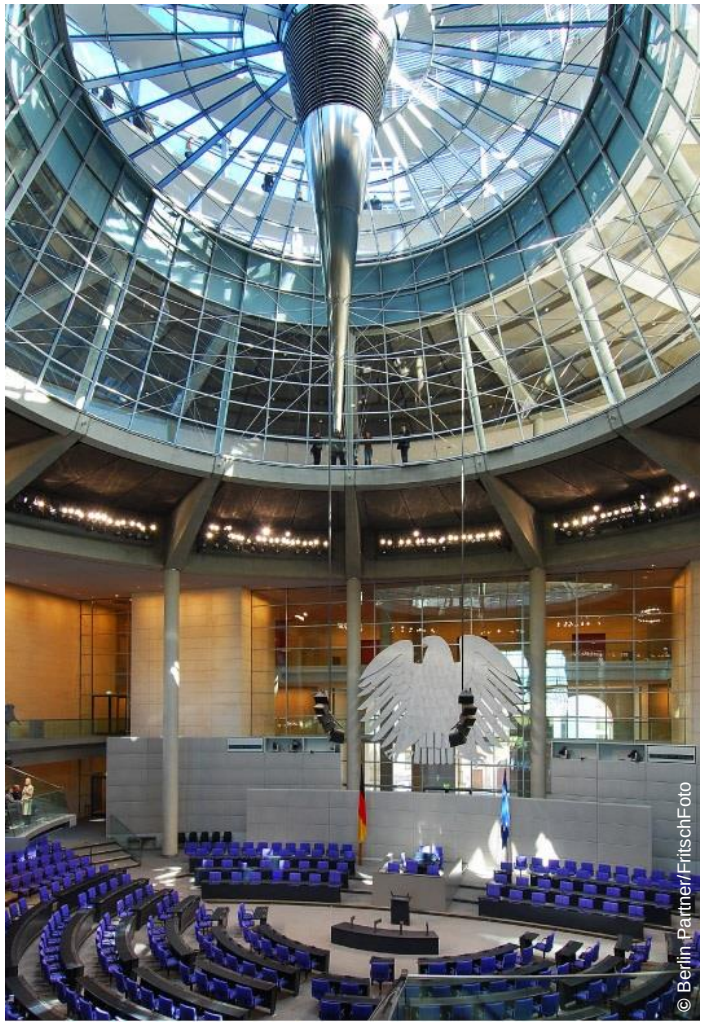
Home of the decision makers

DIPLOMATIC REPRESENTATIONS

150

TOP-LEVEL ASSOCIATIONS

1.500



- The seat of German government and parliament enable direct **contact with decision makers**
- High-quality **contacts** in 150 diplomatic representations and international institutions
- Contacts with high-level associations and federations generate ideal **environment for becoming involved**
- First-class networks from business, science and politics facilitate **fast flow of information**
- **Exchange of ideas** with top companies **at regular intervals**

Quelle: Auswärtiges Amt, Business Location Center (Dez 2012)

Germany’s media capital

WIRES (NEWS AGENCIES)

20

RADIO STATIONS

40

MAGAZINE PUBLISHERS

70

- Foreign correspondents and journalists provide the basis for **excellent international media contacts**
- **Large variety of publications** including many regional and national papers
- **Multimedia news dissemination** via the wires and digital media
- **Ideal conditions** for film and TV **production**
- Germany’s **most prevalent publishing region**

Quelle: Business Location Center (2012)

Location Berlin

Recruitment

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Germany’s highest concentration of academics

HIGHER EDUCATION GRADUATES
annually

24.400

STUDENTS at Berlin’s Institutions of higher education

153.600

GRADUATION RATE
Germany’s highest

82,4 %

- The many students in Berlin ensure **ideal recruiting conditions**
- **High quality of graduates** – excellent graduation rate
- Germany’s highest per-capita density of academic professionals **provides enormous potential of highly qualified talent**
- **Future-oriented training** in natural sciences and engineering
- Berlin is **highly attractive** for international students

Quelle: Amt für Statistik Berlin-Brandenburg (Dez 2012)

Low work-related costs in big-city comparison

LOWER WORK-RELATED COSTS
In comparison to other metropolises

-20%

FOREIGN LANGUAGE SKILLS
speak two languages

70%

RESIDENTS IN BERLIN
younger than 35

790.000

- Qualified professional training provides an e**xcellent pool of specialists and young talent**
- **Largest number of highly qualified specialists** younger than 35 in Germany
- **Lower work-related costs** compared to other European metropolises
- Berlin's residents have **high foreign language skills**

Quelle I Stand: Aktualisierung QIV2013_07.11.2013_Volbracht

Location Berlin

Science

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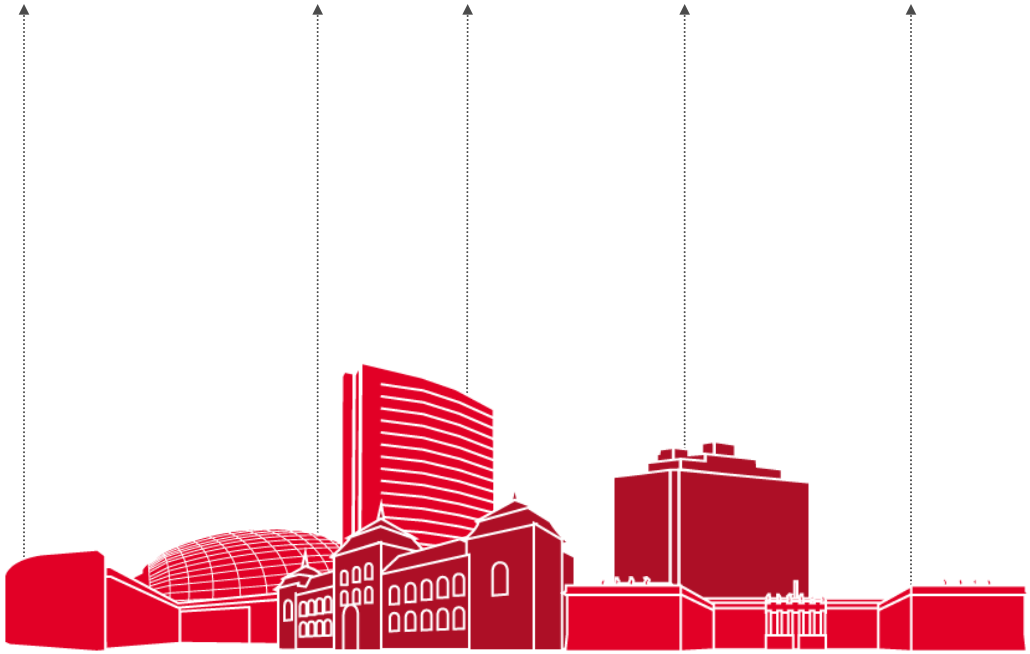
Unique diversity in science

FREIE UNIVERSITÄT BERLIN	UNIVERSITÄT DER KÜNSTE BERLIN	TECHNISCHE UNIVERSITÄT BERLIN	CHARITÈ – UNIVERSITÄTS-MEDIZIN BERLIN	HUMBOLDT-UNIVERSITÄT ZU BERLIN
356 Professors	700 Employees	317 Professors	227 Professors	419 Professors
34.500 Students	3.600 Students	28.900 Students	6.800 Students	28.900 Students



- **Outstanding location for science** in Europe
- **Leading research** at non-university research institutes
- **Research and science are closely linked** at technology parks and business incubators
- **High number of employees** in research and science
- Charité as Europe's largest **teaching hospital**

Quelle: Business Location Center (06/2012)

A leader in research and development

€ INVESTMENTS
annually
1,5 Mrd.€

TOP INSTITUTES
in Berlin
100

TECHNOLOGY CENTERS
in Berlin
22

- **Systematic promotion** of research and development
- Germany's **leader in R&D spending**
- **Top research and training networks** consisting of top institutes and technology centers
- **Ongoing transfer of know-how** among companies and research institutes
- Sustainable **expansion of cutting-edge technologies** like biotech, IT/media or medtech

Quelle: Business Location Center

Location for top international research

FRAUNHOFER INSTITUTES
including Heinrich Hertz Institut; centers for ICT, eGovernment, microelectronics

6

MAX PLANCK SOCIETY
Institutes and centers

4

HELMHOLTZ ZENTRUM BERLIN
Employees

1.100

- Established **location for top research**
- **Fraunhofer-Gesellschaft** with centers for ICT, eGovernment and microelectronics
- **Max Planck Society** with research institutes for infectious biology or molecular genetics
- **Leibniz-Gemeinschaft** with institutes for molecular pharmacology and crystal research
- **Helmholtz Zentrum Berlin** für Materialien und Energie
- **Max Delbrück Center** for Molecular Medicine as an international center for biomedical research
- **Hasso Plattner Institut** for software system technology in Potsdam

Quelle: Fraunhofer Institute, Max-Planck-Gesellschaft, Helmholtz-Zentrum, Leibnitz Gemeinschaft, Hasso-Plattner-Institut für Softwaresystemtechnik GmbH

Model region for cutting-edge clusters

TECHNOLOGIEPARK ADLERSHOF
companies

904

TECHNOLOGIEPARK ADLERSHOF
revenue

1,3 Mrd. €

- **Excellent infrastructure** for starting businesses in future-oriented technologies based on the clusters
- **Technologiepark Adlershof** is the leading location for high-level technology, science and media
- **BiotechPark Berlin-Buch** is a growing campus for healthcare research and biotechnology
- **CleanTech Business Park Marzahn** is a modern flagship location for the international solar and clean tech sectors
- **Mediaspree** is the international center for media companies
- **Leading model region for electromobility** in Europe

Quelle: Adlershof.de (Dezember 2012)

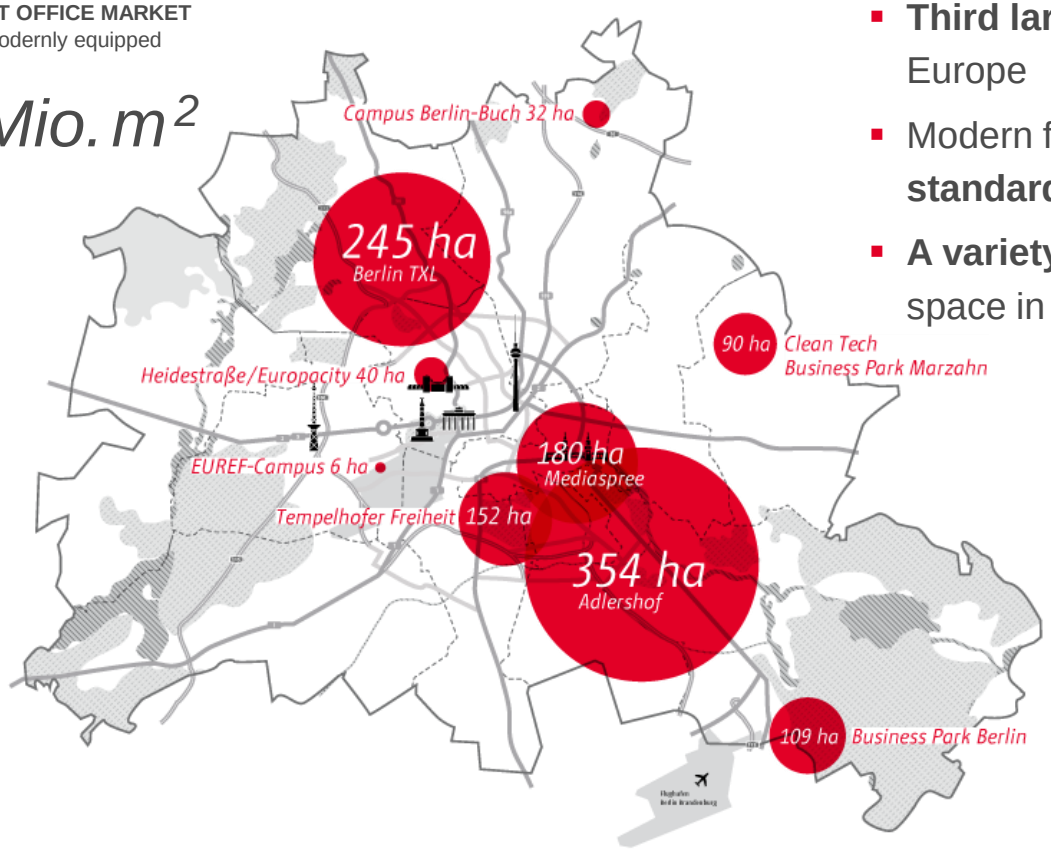
Location Berlin

Real estate

Top locations at unbeatable prices

THIRD-LARGEST OFFICE MARKET
In Europe with modernly equipped real estate

18,6 Mio. m²



- The **best selection of commercial real estate** across Europe
- **Third largest office space market** in Europe
- Modern facilities promote **high standards of quality**
- **A variety of offers** for commercial space in top locations

Quelle: Cushman & Wakefield (C&W): European Cities Monitor, 23. Aufl. (Okt 2011), Eureal Marktbericht 2005, BLC (Nov 2012)

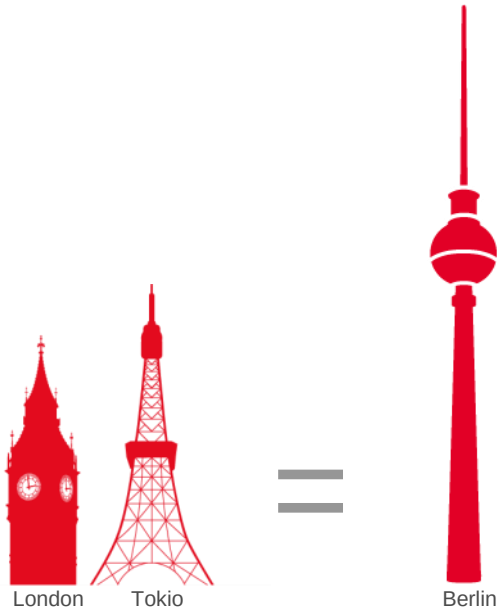
Development parks and office locations

DEVELOPMENT PARKS / OFFICE LOCATIONS
at excellent sites in Berlin

Inexpensive real estate

VACANCY
of office space in Berlin

5,9 %



Only 20% of net rent (12.50 euros per m²) compared to London and Tokyo

- **Lower rental prices** in international comparison
- **Considerably lower level of costs** for obtaining real estate
- **Only 1/5 of the costs** of gross monthly rents compared to London or Tokyo
- **High quality of life in city spaces** for executives, employees and families
- **Premium buildings** by internationally known architects like Renzo Piano or David Chipperfield

Quelle: Business Location Center (12.2012), CBRE MarketView Büromarkt Berlin (Q2/2012), Angermann Büromarktbericht Berlin 2011, Büro- und Investmentmarkt Savills (Q1/2012)

Location Berlin

Events

Preferred location for conventions

TRADE SHOWS
in 2011

60

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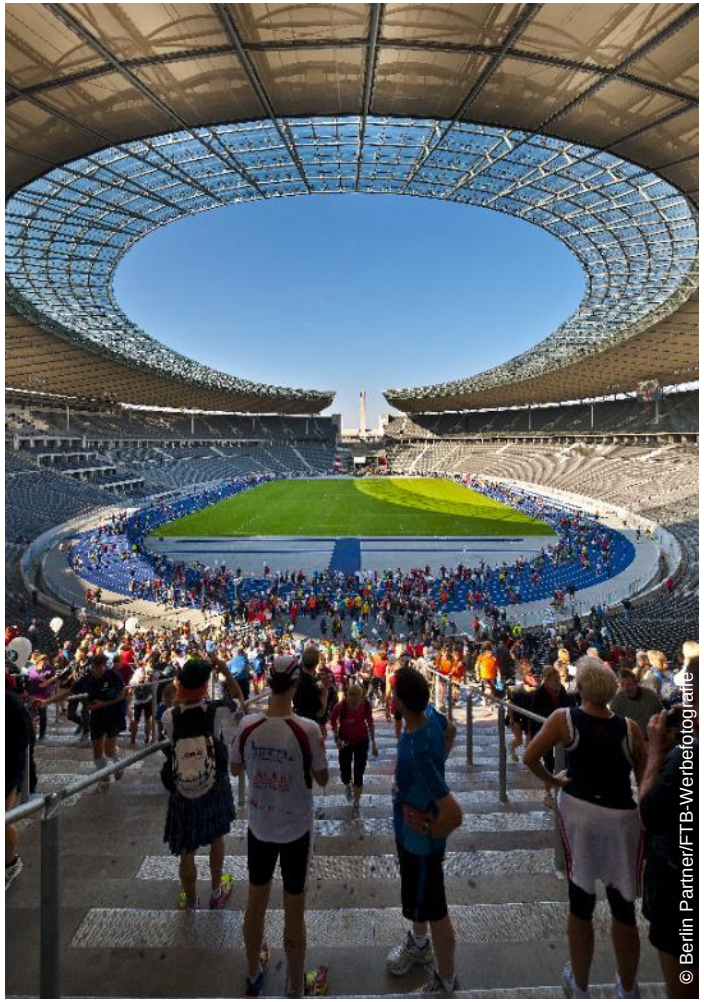
- Among the **top 4** of the world's **most prominent convention cities**
- **International meeting place** as an important trade show location
- Continually **growing number** of international exhibitors
- **6 leading international shows:** IFA, ITB, International Green Week, ILA, Fruit Logistica and InnoTrans
- **Successful trendsetting events** including the Bread & Butter fashion show

Quelle: International Congress & Convention Association (2012), Messe Berlin GmbH (2012); Kongressstadt Berlin, SenWTF (2012), Business Location Center

Germany’s capital for events

SPECIALIST VISITORS
in 2012

10,5 Mio.



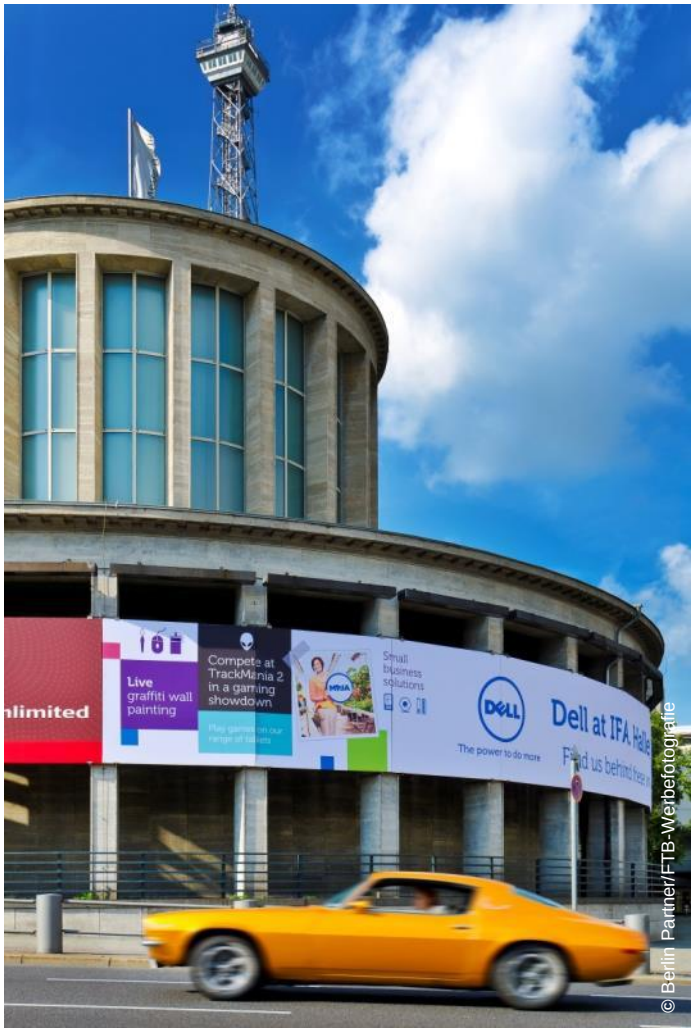
- **High frequency of events,** and Germany’s **richest and most diverse selection of events**
- **High-quality cultural events** like the Berlin Film Festival
- **Large event locations** like the O_2 World, Olympic Stadium, Waldbühne
- **Hip event metropolis** with internationally renowned clubs

Quelle: visitBerlin Geschäftsbericht (2011), Kongress Statistik „Jahresbericht 2012“ ghh consult GmbH

Affordable overnight stays

DOUBLE THE NUMBER OF BEDS
Within 10 years

126.000



- **Affordable price-performance ratio** of overnight stays in European comparison
- **The number of hotel beds has doubled** in 10 years
- **Flexible, modern infrastructure** for international events
- **Excellent conference logistics** with the ICC as Europe's largest conference center and new CityCube at the Messe
- **High concentration of new 5-star hotels** like Waldorf Astoria and Ritz Carlton

Quelle: visitBerlin Geschäftsbericht (2011)

Location Berlin

Quality of life

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International leader

Public GREEN SPACES

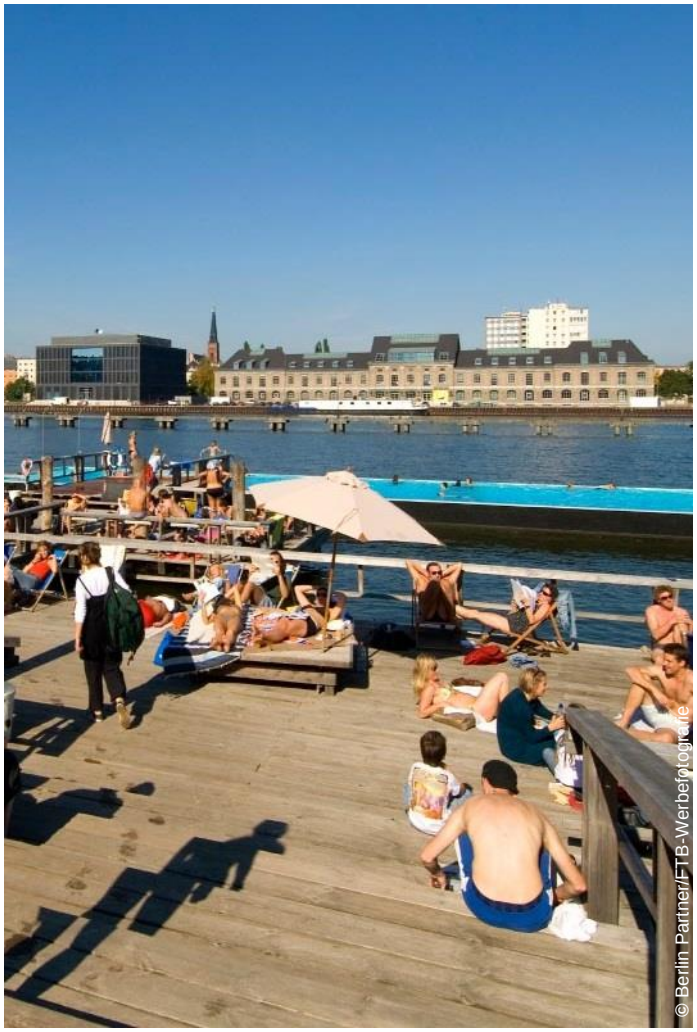
2.500

BIKE PATHS

600 km

PERCENTAGE
of parks, forests, lakes and waterways

30%



- **Germany's number 1** for sightseeing, restaurants, quality shopping and friendliness
- **Green capital** with parks, lakes and forests
- **High recreational value** for sailing, horseback riding, flying, golf and also for families with children
- **Popular shopping metropolis** with KaDeWe as continental Europe's largest department store

Quelle:Cushman & Wakefield (C&W): European Cities Monitor, 23. Aufl. (Okt 2011), Senatsverwaltung für Stadtentwicklung und Umwelt (Dez 2012), Berliner Senatsverwaltung für Verkehr und Stadtentwicklung (Nov 2011)

Leading Cultural Metropolis

MUSEUMS
and collections

180

GALERIES

500

ARTISTS

6.000

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- **Leading cultural capital** with 3 UNESCO world cultural sites and 9 palaces
- **Popular musical metropolis** with star conductors like Sir Simon Rattle and Daniel Barenboim, as well as a famous club scene
- Internationally renowned **theater and opera city**
- **City of film** with the Berlin International Film Festival (Berlinale)
- Germany's **number 1 art location** with a high concentration of museums and galleries

Quelle: Berlin.de/Investitionsbank Berlin (Juni 2012), reisetipps-weltweit.com (Dez 2012), Berlin.de (Dez 2012), Investitionsbank Berlin (Feb 2011), visitBerlin (Dez 2012)

Family-friendly city

CHILDRENS'S DAY CARE sites

1.977

- One of Europe's most **family-friendly cities**
- **A leader in child care** for an optimal work-family balance
- **Strong family** infrastructure through day care or international schools
- **The world's second best sports city** following Melbourne
- Germany's **culinary capital**

Quelle: Tripadvisor (2012), Amt für Statistik Berlin Brandenburg (2011), Sportmetropole Berlin (Dez 2012), berlin-reise-dienst.de

Location Berlin

Cosmopolitan

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Popular Travel Destination

OVERNIGHT STAYS
in 2011

22,4 Mio.

VISITORS
in 2011

9,9 Mio.

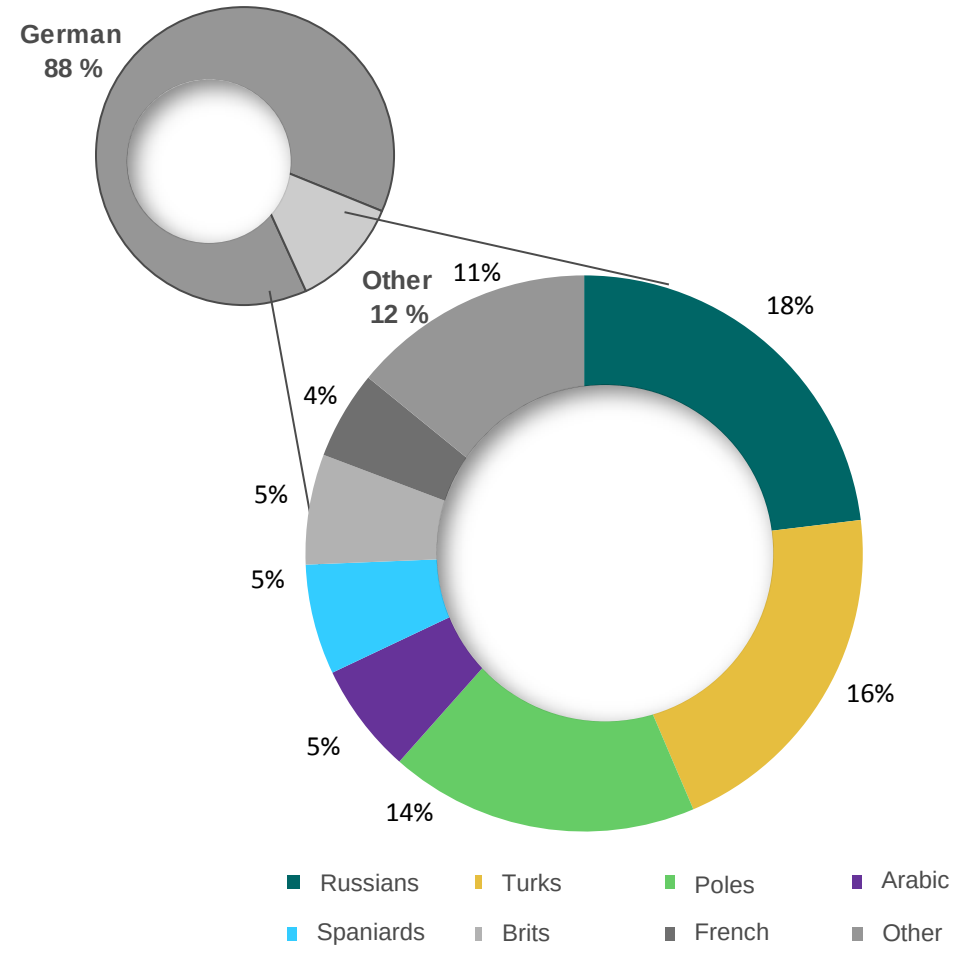
© Berlin Partner//Scholvien

- Germany's **most visited city**
- **Number 3 in Europe** in overnights behind London and Paris
- **Constant growth** in overnight stays
- **In-destination** for international guests
- **Large popularity**: 132 million day tourists per year

Quelle: *visit*Berlin (2012)

Germany’s most cosmopolitan city

Native Languages in Berlin



- **People from 190 nationalities** call Berlin home
- **A quarter of Berlin’s residents** come from migrant families
- The institutions of higher education are **highly international**
- Berlin’s residents have **excellent foreign language skills**
- ‘Creatives,’ artists and students from all over the world are **constantly drawn to the city**
- **International atmosphere** is attractive for employees and business partners

Quelle:Amt für Statistik Berlin-Brandenburg (2011, Juli 2008), Bundesministerium für Bildung und Forschung (2010), Bevölkerungsbefragung BP (2010)

Tolerant metropolis

★ **DIFFERENT NATIONALITIES**
at the Carneval of Cultures

70

- Germany's **most tolerant city** – along with Hamburg
- A long-standing tradition of **cultural openness** towards migrants and minorities
- Large **multicultural festivals** like Carnival of the Cultures
- Variety of **religious** groups **and diversity of beliefs**
- Growing **Jewish community**

Quelle: Studie Roland Berger Strategy Consultants, karneval-berlin.de (2010), Tagesspiegel (Jan 2010), BDV (Dez 2012)

Location Berlin

Trends

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First address for cutting-edge clusters

EMPLOYEES
in solar energy research

5.000

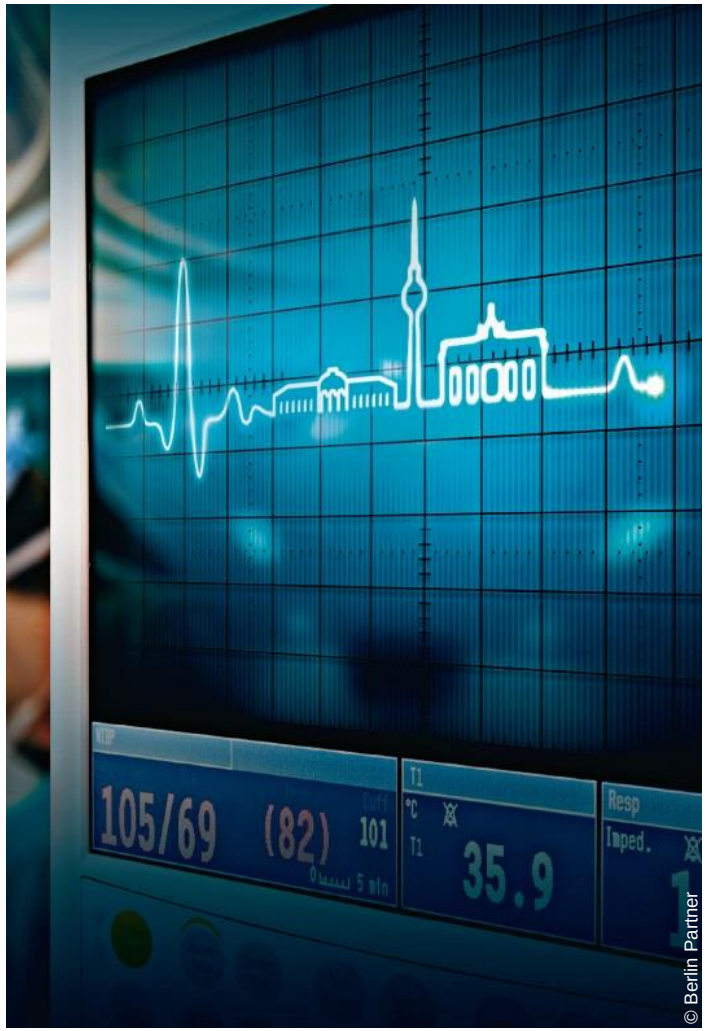
- Compared to the rest of Europe, a **unique concentration** of large research institutes and universities
- Highest density of **solar energy research** in Europe
- The international number 1 in **clean tech** and **green tech**
- Rapidly growing **energy technology sector**
- A top-5 **biotech location** in Europe

Quelle:PM Senatskanzlei (Juni 2012), BePa (Mai 2010), SenWTF (2009), IHK Berlin (2010), BioTOP Biotech Report 2012

International e-business center

COMPANIES
in IT/Media

18.000



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- International e-businesses, Internet providers and network providers in Berlin have enabled **localized sector expertise**
- **Dynamic economic development** in the IT/media sector
- Important **location for established market leaders** like IBM, Oracle, eBay
- **High quality of training** through special courses of study

Quelle:Medienboard Berlin-Brandenburg (2012), BZ (Feb 2011), Medienboard Berlin-Brandenburg GmbH (2012)

Berlin-Brandenburg – Model for Electromobility

€ PROJECT VOLUME
Showcase Electromobility Berlin-Brandenburg:

roughly 83 Mio. €

Berlin Agency for Electromobility eMO

Berlin Partner for Business and Technology

www.emo-berlin.de/en

- **Aim 2020**: International recognized Model for Electromobility
- **Strengthen the industrial added value** in the region
- **Improvement of the environment and the quality of life for residents**
- **Roughly100 aktive projects** and 50 in preparation
- **Berlin-Brandenburg International Showcase for Electromobility** (2013-2016) with more than 100 partners
- **Roughly 450 aktive players** from all added value areas

Source: Aktion Plan for Electromobility 2020, statement by eMO

Boomtown' for young companies

€ ANNUAL REVENUE
for companies focusing on web content, social media, games and mobile devices

1 Mrd. €

- Has become the **European Silicon Valley**
- **Home to successful start-ups** like SoundCloud or DaWanda
- **Boomtown** for companies focusing on web content, social media, games and mobile devices
- **Important location for the future-oriented sectors** of mobile entertainment and mobile communities
- **Leading games cluster** with market leaders like Wooga and Frogster

Quelle:Tagesspiegel (Okt 2011), Medienboard Berlin-Brandenburg GmbH (2012)

Pole position for the ‘creatives’

FASHION DESIGNERS
and labels

1.000

- **Germany’s music capital** with 2,200 sector companies
- **Home to international sector giants** like Universal Music Deutschland or Sony Music
- **An aspiring fashion metropolis** with many young fashion labels
- **“Stadt des Designs**” (City of Design): the only German city to be a member in the UNESCO “Creative Cities” network
- **Location for famous trend-setting events** like Bread & Butter, Fashion Week Berlin and re:publica

Quelle: Medienboard Berlin-Brandenburg GmbH (2012)

Welcome to Berlin

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