Germany - Media Landscape

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Overview

The German-speaking media market is comprised of about 100 million people in Europe. Next to Germany and Austria, large parts of Switzerland speak German as do German-speaking minorities in other EU countries such as Belgium, Denmark, and

Luxembourg.

The country has a long tradition of mass media and is one of the most dynamic media markets in the world. This is reflected in the consumption patterns of media users, who have an average media use of 9.5 hours per day.

Today's media landscape is coined by history. While mass media became a tool of the dictatorship during the Nazi era, the post-war media system started anew under democratic signs. This was based on the principle of press freedom, which is stipulated in the Basic Law (constitution) of 1949. Until 1990 the country was divided into Western and Eastern Germany, while after the reunification it has become a federal state with sixteen different *Länder* (federal states), with the broadcasting system organised accordingly. In the 1990s Easterners in the unified state were served with specific print titles, which can be seen in the patterns of media usage that still differ between the East and West. Today, the major print production centres are located in the "old" West and newspapers of the former GDR do not exist anymore or are usually controlled by Western companies. Broadcasting is integrated into the Western dual system with few newly-founded regional public-service media (PSM) outlets within the Eastern federal states.

The media landscape is characterised by a long and deeply-rooted tradition of the press, with the first newspapers having emerged about 400 years ago. Despite a changing landscape due to other competitive players in the advertising market, like broadcasting and digital media, the periodical press today still plays a major role in disseminating political background and local information, encouraging analysis and critique, forming opinions, educating, counselling, and entertaining, as Klaus Beck (2012) describes.

High levels of press circulation are ensured by regional and local subscription papers, which are complemented by nation-wide quality newspapers (ie *Frankfurter Allgemeine Zeitung*) and yellow press titles (ie *Bild*).

Press enterprises are independent entrepreneurs, basically financed by advertising and subscription revenues. Compared to broadcasting, the state intervention in the press is confined to a discrimination-free media policy and a fiscal privilege of the press enterprises (including a lower turnover tax and subsidised forwarding costs). Due to market concentration, five large companies have a highly-diversified range of print-and other products that dominate the newspaper market: *Axel Springer SE*, *Südwestdeutsche Medienholding*, *Funke Mediengruppe*, *DuMont Schauberg,* and *Madsack*. According to Horst Röper in *Media Perspektiven 5/2016,* the "big five" acquired a market share of over 42 percent in 2016.

Political parallelism in the press is traditionally low since 1945 in Western Germany. The journalism profession has since achieved an effective self-regulation and established ethical standards, which were set in the *Presscodex* of the self-governed *Presserat* (Press Council). However, recent events of common concern, like the Ukrainian crisis or the refugee influx, provoke claims from civil society, criticizing ethical standards and "swarm-journalism", where too many journalists too often report the same issue in the same manner. Some journalists, meanwhile, reflect publicly about their role and function in society and describe their profession as too dominated by the worldviews of white, middle-class, well-educated, male protagonists. Although press circulation is high, radio and-predominantly-television consumption still ranges above the average compared to other European countries, with daily television consumption summing up to an average of 223 minutes per person. Interestingly, the viewing figures of TV audiences are approximately twice as higher than those of German-speaking Switzerland and about one hour more than those of Austria.

The broadcasting sector is characterised by a dual system of public-service media (PSM) and commercial broadcasters. public-service broadcasting was installed by the allied forces after World War II following in its basic structure and mandate the example of the British BBC. Since then, broadcasting has become an important employer. Currently, about 24,000 people are working in PSM, compared to about 13,600 in commercial TV and over 4,000 in commercial radio.

The Federal Constitution stipulates that the sole responsibility for broadcasting rests within the states of the Federal Republic as part of their “cultural sovereignty”. Because of this, the public-service broadcasters are a creation of the *Länder*, which act either individually or together (in agreements). The federal system is reflected in the decentralised broadcasting system, with eleven PSM networks in the *Länder* broadcasting with a nationwide range: Nine broadcasting stations collected under the roof of the *Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland* (Consortium of public broadcasters in Germany - *ARD)*. Furthermore, one television-only station broadcasts with nationwide range, the *Zweites Deutsches Fernsehen* (*ZDF)*, as well as the radio-only broadcaster *Deutschlandradio.* The broadcaster *Deutsche Welle* (DW) is an exception in the sense that it is based on federal legislation and designed to provide public diplomacy services (radio, TV, and internet-based) in German, English and 30 other foreign languages. With the recent refugee influx, DW also offers mother-tongue information for migrants.

The typical public-service broadcaster is set up as an independent organisation and financed primarily by licence fees that are paid by households. Advertising is restricted to a few windows through legal means. The public-service broadcasting institution (*Anstalt*) usually provides a region of one or more federal states with public-service radio and/or television. For example, NDR is the joint corporation for the four Northern federal states (Schleswig-Holstein, Hamburg, Lower Saxony, and Mecklenburg-Vorpommern).

The state’s regulatory role in shaping the face of Germany’s broadcasting sector is more dominant than in the print sector. However, the state sets the regulations and legal means that guarantee that PSM are distant-of-state. Inside the regional PSM networks, co-governance with the involvement of so-called socially-relevant groups, a mix of organisations and interest groups that should represent the society’s diversity, is a strong principle. The composition of the groups was timidly adjusted in 2015 following a verdict from the Federal Constitutional Court.

Commercial radio and television were only established with the liberalisation of the broadcasting market in 1984 in (Western) Germany, after long debates about its possible negative influence on society. Until then, PSM had a monopoly in the broadcasting sector. Today a large number of commercial television and radio stations are well established and are mainly consumed by younger audiences. Pay TV is less popular , but new streaming services, like Netflix, attract new audiences, particularly with their invention of high-quality contemporary drama series.

The German media users seem to rather prefer traditional linear media (press, radio and television) over internet-based media. However, the growth rates of internet usage are enormous, specifically among the youth. Therefore, PSM try to keep up with the digital challenge and make their content accessible via online media centers and on various social media platforms like Youtube and Facebook.

The producers of quality journalism in the press, however, have difficulties in benefiting from this development. New challenges and changes in the German media system will, hence, be inevitable in the near future.

Media

Print

The German print market is the largest in Europe and the fifth largest in the world. According to WNA-IFRA, Germany’s newspaper market is amongst the most stable in the world. The press is characterised by the broadest diversity of titles in Europe with, simultaneously, a very high publishing market concentration. Between the record-setting year 2000 and 2010 the total revenues of the press has decreased about 20 percent. Furthermore, advertising revenues between 2010 and 2016 dropped by about 60 percent, from €6.9bn to approximately €3.85bn.

The number of “independent editorial units” (meaning editorial entities that self-sufficiently produce all sections of a newspaper) has remained relatively constant during the last decade. According to Walter J. Schütz (2012), 130 independent editorial units could be counted in 2012. In fact, the number of newspaper titles summed 344 in 2016. If local editions of these papers are included, there are 1,528 different dailies with a run of about 16m copies per day. Of the 344 different dailies, seven are distributed nationwide (1.1m copies) and eight are sidewalk-sale papers (2.8m copies). In total, 329 local and regional subscription newspapers were published in 2016. Next to regional and local papers, the backbone of newspaper publishers are subscriptions, with about 11.3m papers delivered to households every day, compared to approximately 600,000 sidewalk sales.

In addition to daily newspapers, German readers can choose between 21 weekly papers with a circulation of 1.7m copies and seven Sunday papers with a circulation of 2.9m copies. According to the high interest in news, the weekly and Sunday papers reflect the editorial concept of the respective daily and mostly provide in-depth information or news that have the potential of setting the agenda for the coming week. The *BILD am Sonntag* (BamS) boasts the largest circulation, with about 964,000 copies sold in the first quarter of 2016. However, it has lost over 69,000 readers in one year alone. The weekly *Die Zeit* follows a liberal agenda and sold over 442,000 copies in the same year. It is the only weekly that could win new readers as compared to the previous year, according to *Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern* (the German Advertising Federation - IVW).

Since the early 1990s, the numbers and circulation of newspapers in Germany have shown signs of decline. The *Frankfurter Allgemeine Sonntagszeitung* (FAS) gives one example for the long-term weaknesses of the weekly and Sunday-paper markets. With 252,253 copies sold in 2016, the paper is the fourth largest weekly. However, circulation has declined since 1998 by 148,054 copies, or 37 percent.

The shrinkage of the market during the last decades particularly holds true for the tabloid papers, such as the nationwide *BILD*. This paper exhibited a decline of 37 percent between 2000 and 2010, due to similar infotainment content being available online and elsewhere. However, the most read paper in 2015 is still the *BILD* (with 10m copies), followed by the *Süddeutsche Zeitung* (1.1m), the *Frankfurter Allgemeine Zeitung* (0.68m), *Die Welt* (0.67m), the *Handelsblatt* (0.42m) and *Die Tageszeitung* (0.2m), according to *Arbeitsgemeinschaft Mediaanalyse* (AGMA)

The total circulation of printed newspapers lost almost 11m copies between 2000 and 2016, according to Röper (2016). In fact, the total penetration of printed newspapers has fallen from 72.4 percent in 2008 to 63.6 percent in 2016, according to the recent Media Analysis of the *Bund Deutscher Zeitungs Verleger* (Federation of German Newspaper Publishers – BDZV). Data about the figures per age cohort, unveil the demographic challenge that the publishing industry in Germany is facing: Whereas the penetration of printed papers amongst best-agers of 50 to 70 years-old is traditionally high (between 72 percent and 79 percent), the penetration among younger readers (20-29 years-old) decreased from 66 percent to 45 percent between 2001 and 2016. In the same period of time it dropped significantly in the youngest age group (14-19 years-old) from 55 percent to 31 percent. However, the young cohort of those 14-29 years-old shows the highest results in online-paper penetration (67 percent). The number of readers in the Internet is increasing, with about 63 percent or 44.7 million Germans reading an online newspaper. Furthermore, mobile aapps are used by 9.6 million users, ie to get informed by a publishing house on mobile devices in real time.

This shift from print to online news consumption unveils the upcoming long-term challenges of the newspaper market. Currently, the printed paper is still an important source of up-to-date information, right after broadcasting. However, the decline is rapid. While in 2015 45 percent of the average interviewees of the Reuters Digital News Report relied on newspapers or political print magazines, this only holds true for 36 percent in 2016. The newspaper industry currently feeds from those (older) readers, who grew up with printed newspapers-and everything they stand for. It seems unlikely that Internet-affiliated youngsters who are not so interested in socio-political news, might change their consumption habits when they grow up.

Accordingly, the total revenues for German dailies and weeklies have decreased between 2000 and 2012, from €10.8bn to €8.9bn. Additionally, revenues from advertising dropped about 60 percent between 2000 and 2016, from €6.6 to €2.6bn, according to Röper (2016).

Since 2008, a crisis year due to a major setback of revenues, concentration processes have accelerated. The digitisation drove a growing amount of advertisers away from print and into Internet-based media. According to the high market concentration, ten publishing companies reach a market penetration of approximately 60 percent. The five largest companies even acquired a market share of over 42 percent in 2016, whereas *Axel Springer SE*, a conglomerate focused on a digital market strategy and formed by horizontal, vertical, and diagonal concentration processes, has taken the lead.

Some of the newspapers run by the five largest publishing companies are outlined below:

- Axel Springer SE: *BILD*, *Bild am Sonntag*, *Die Welt*, *Welt am Sonntag, B.Z.* (*local*), *B.Z. am Sonntag* (local).
- Südwestdeutsche Medienholding: *Süddeutsche Zeitung*, *Stuttgarter Zeitung* (local), *Stuttgarter Nachrichten* (local), *Bayrische Staatszeitung* (local).
- Funke Mediengruppe: *Westdeutsche Allgemeine Zeitung* - WAZ (local), *Berliner Morgenpost (local), Hamburger Abendblatt (local), Thüringer Allgemeine* (local).
- DuMont Schauberg: *Berliner Zeitung* (local), *Express* (local), *Kölner Stadtanzeiger* (local).
- Madsack: *Märkische Allgemeine* (local), *Hannoversche Allgemeine* (local), *Neue Pressse* (local).

Local newspapers and local news play a major role in agenda setting in Germany (Reuters Digital News Report 2016). However, data on the number of subscribers unveil a downward trend, particular concerning the local press of the capital Berlin. In fact, the Berlin *Tagesspiegel* (Holtzbrinck Media) lost over 10 percent of its readers in 2016 and the tabloid *B.Z.* (Axel Springer SE) lost over 9 percent compared to the previous year, according to IVW.

Despite the traditionally-low political parallelism, some newspaper and magazine publishers pursue a specific editorial policy that reflects a political agenda, even if they do not have structural connections to political parties. One example is the publishing house *Axel Springer SE*, publisher of the most circulated tabloid, *BILD*. Journalists working in the company are bound by contract to its basic codes of conduct, which includes Israel's right to exist and support of the liberal market economy.

After dailies and weeklies, periodicals and magazines are the next best-selling print genres in Germany. However, the total number of titles, about 20,000, is only an estimation, due to fluctuations forced by high figures of market entries and exits. Illustrated magazines and TV-programme journals are most read, followed by trade publications. Their number is estimated at over 1,500 titles by the Austrian media expert Heinz Pürer. However, this print segment also shows signs of decline. The total circulation of periodicals dropped from 124m in 2000 to 110m, by about 13 percent, in 2010. According to the Association of German Magazine Publishers (VDZ), 68 percent of the revenues stem from periodicals' paid circulation, 14 percent from online business, and 18 percent from other sources such as secondary businesses. The net advertising revenues of magazines and periodicals summed €1.08bn in 2015. With a circulation of about 15m million in the first quarter of 2017, the most read journal is the monthly magazine *ADAC Motorwelt*, property of Germany's biggest automobile club, ADAC. On the sixth position there is the largest political magazine, *Der Spiegel*, with a circulation of 6.79m; with its investigative journalism and specific style it represents the most influential political journal The most successful publishing houses for periodicals are *Bauer* (Hamburg), *Burda* (München, Offenbur, and Berlin), *Axel Springer* (Berlin and Hamburg), *Gruner+Jahr* (Hamburg) and *WAZ Holding* (Essen). These five players reached a periodical market share of 63.6 percent. However, smaller publishers can also enter the market via companies in the distribution system, the *Pressegrosso*, which guarantees a discrimination-free distribution of printed magazines.

With respect to the multicultural society, numerous target group newspapers and magazines are produced and sold in Germany. While most of them are still available in the mother tongues of the former guest workers, transcultural experiments, such as the bilingual newspaper supplement *Per?embeh* (2000-2002) for a younger post-migrant generation, were suspended, because lacking reader's interest. The small, but nevertheless important, foreign-language market for (post-)migrants and diasporas has its tradition in various forms of immigration, mainly in the guest worker communities. These began to emerge in the 1960s due to the official guest worker recruitment in Southern European states like Italy and Turkey. Furthermore, the high figures of Eastern European and Russian repatriates invited to Germany in the 1990s created another segment of this market. The community with Turkish roots is the largest, according to official statistics of about 3 million citizens, or 4 percent of the population, being of Turkish descent. The Turkish-language paper with the largest circulation is the conservative *Hürriyet*. The Europe edition was produced near Frankfurt a. M. and had its first edition in 1971. The Russian-language target group alone comprises between 3.5 and 5 million potential readers in Germany and other German-speaking parts in Europe; it is served with over 50 daily titles and periodicals. The third segment is formed by mostly English-language print products that suit a globally interdependent economy.

Radio

The radio landscape is strongly influenced by the state's federal structure, the broadcasting regulation competency of the *Länder* and the dual broadcasting system. In 2016 Germany had 70 public-service radio stations and 283 commercial radio stations on air, according the *Medienanstalten* (Media Authorities). The public-service stations in the Federal States usually have a regional focus. Instead, commercial radios are licensed in all *Länder* and have a rather local approach. In addition, there is a national public-service radio, *Deutschlandradio*, under the roof of the *ARD*, which is the preferred info radio in Germany with a reach of over 1.5 million daily listeners. It is free of ads, airs mostly news and information and is subdivided into *Deutschlandfunk* (Cologne, news and information) and *Deutschlandradio Kultur* (Berlin, culture and news). Furthermore, *Dradio Wissen* is the internet-based young radio channel of *Deutschlandradio*.

Radio is a popular mass medium that accompanies the public throughout the day. About 80 percent of those above the age of 14 regularly listen to the radio. Among people with a migrant background, radio has a far lesser reach; only 51 percent tune in, according to the 2011 ARD/ZDF Media Commission Study. The average daily consumption patterns reach 173 minutes per day among users of German origin, which is the second longest after television (208 minutes). Those who are in fact listening to radio stay with it for over four hours (249 minutes).

In 2016, at least 46 percent (2014: 52 percent) of Germans declared that they use the radio to access news, compared to 72 percent (2014: 84 percent) who preferred television over radio as the primary source of news; 59 percent preferred the Internet, and only 38 percent printed news (Reuters Digital News Survey 2014, 2016). Among the (post-)migrant communities, a similar interest in radio consumption is observed. Like their German-origin counterparts, younger (post-

)migrants are less information-oriented.

In total, public-service radio under the roof of the public broadcaster *ARD* stands out, with over 36 million daily listeners, compared to the 29.9 million listeners of commercial radio programmes.

In terms of market share, the data shows a diverse regional pattern, as each state is responsible for licensing and regulation of broadcasting. In some *Länder,* like Rhineland-Palatinate, the public-service program *SWR3* reaches by far the highest market share (23.3 percent) before the most successful commercial program *RPR1* (12.5 percent), as indicated in the Media Analysis Study 2016 Radio I. In *Länder* like Hesse or Sachsen-Anhalt, however, a commercial radio broadcaster leads the ranking. In total, two public-service radio stations, *SWR3* and *Bayern1*, lead the market with a 4.4 percent share in 2016, while *SWR3* stands out with 14.3 percent of the listeners on an average day (Monday-Sunday, 05.00-24.00h). Public-service radio under the roof of the *ARD* has achieved a 55.7 percent share, whereas the private networks reach 42.3 percent of the shares (Media Analysis 2016 Radio II).

The economic situation of public-service radio is basically influenced by public funding; radio receives a €3.39bn share of the overall €8bn collected by compulsory licence fees. The revenues from advertising are the second source of income for public-service radio, with radio stations under the roof of the ARD acquiring a net €244m from advertising in 2015, an increased sum of about 6 percent compared to the previous year.

Privately-owned radio stations are economically stable and acquired an income of over €409.7m in 2015 from advertising. In fact, an increase of local commercial radio stations of about 5 percent in 2014 led to a turnover growth, according to the KEK. Media analysis recently point to an unexpected trend that reversed the usual decline of traditional media and formats. Radio stations with informative programs were able to win younger audiences below the age of 40, while at the same time youth channels lost listeners. Unexpected is also the mode in which the youth still access radio, which is mostly via car radios (75 percent) and a “usual” radio set (52 percent), according to the *Jugend, Information, (Multi-)Media, JIM 2016* (Youth, Information, and (Multi-)Media Study) ().

For large diasporas in Germany, like those with Turkish roots, a variety of mother tongue radio programmes are available. While public-service broadcasting pulled back its activity in providing mother tongue programmes, traditionally aired for guest workers, commercial local radio channels have become popular, like *Radio Metropol* in Berlin.

Non-commercial community radio, the so-called Free Radio (*Freie Radios*), exists in all *Länder*. The federal state with the highest amount of these self-governed radio stations is Baden-Württemberg, due to its long history of radio activism. Despite these examples, one cannot speak of a dynamic and viable community radio scene as compared, for example, to France.

As regulations differ in each state, some *Länder* like Hesse were rather late in licensing Free Radios. Some states favour other models that allow public participation in free-of-access media so called *Bürgersender*, such as local public access radio and television channels, educational stations, and campus radio/television, which allow for better control, because they are licenced, financed, and governed by the regional Media Authorities. Summed up, 173 *Bürgersender* are in place in the year 2015. In the public access sector, the situation also varies from state to state. In Rhineland-Palatinate, 19 public access channels (Open Channels, radio and/or TV) are in operation, whereas the Bavarian media law does not allow any

Television

Television is the preferred medium, which is confirmed by increasing consumption patterns of preferably classical, linear TV. Viewing figures of GFK-television analysis point that Germans spent an average of 223 minutes per day in 2015 watching television. (Post-)migrant communities show similar consumption patterns.

In 1950 all regional public broadcasters commonly founded the *ARD,* a roof organisation under which regional public-service broadcasters in the *Länder* gather. These regional networks contribute according to their size to the nation-wide TV channel *Das Erste* (the first and longest-operating TV programme). In addition, each regional broadcaster independently organises a regional programme (so-called Third Programme). It offers thematic content and issues related to the region and more (local) culture, as well as education-oriented programming.

The *Zweites Deutsches Fernsehen* (Second German Television- ZDF) was founded in 1961 (the first program aired in 1963), was based on a legal agreement of all the *Länder* (*ZDF-Staatsvertrag*) and is located in Mainz. *ARD* and *ZDF* jointly offer a number of special interest channels: *Arte* (in cooperation with France), *3Sat* (in cooperation with Austria and Switzerland), *Kika* (for children), and *Phoenix* (news, events, and documentaries. Furthermore, *ARD* and *ZDF* offer a range of online special interest channels, such as *ZDFneo* (entertainment), *ARD alpha* (education), or the joint online-only channel *FUNK* (for the youth).

During the last decades the fragmenting audiences are reflected in an ever-increasing number of television channels. Since the new millennium the amount of commercial programmes with a nation-wide range more than doubled, from 60 to 152, including 55 freeTV and 84 pay TV channels, according to KEK. In addition, 231 regional or local channels, respectively, are licensed. The number of public-service channels declined slightly from 23 to 20 programmes, which is basically the result of the merging of the regional broadcasters *ORB* (Ostdeutscher Runfunk) and *SFB* (Sender Freies Berlin) into *RBB* (Rundfunk Berlin-Brandenburg) and the discontinuation of the digital programs *EinsPlus* and *ZDFkultur* to create the jointly organised online youth program *FUNK*.

The fragmentation of the market and audiences coincides with an increase of traditional linear TV consumption. In fact, consumption has grown since the year 2000 from an average of 190 to 223 minutes per day. Public-service programs benefited most from this development, while private programs distinctly lost market shares. In 2015 the average shares of the popular commercial programs *RTL* and *Sat1* dropped to single-digit patterns, similar to those of 1988. At the same time, the share of *Pro 7* decreased to an amount comparable to 1991. Among the younger viewers, those between 14 and 29 years-old, the figures show a less dramatic downwards trend: Market shares of commercial TV still range in a double-digit zone with, however, signs of decline. Non-linear television consumption in the Internet is possible via various platforms and is increasingly accessed, mostly by younger audiences.

The market leader in February 2017 is the public-service television-only network *ZDF*, for the fifth time in a row, with a 13 percent share. The Institute for Empirical Media Research accounted the *ZDF* as the general channel with the highest amount of information. The so-called third programs-the regional outlets of the broadcasting stations under the roof of the *ARD* in the *Länder*-follow with a 12.4 percent share. Finally, the first program, the nationwide channel of the *ARD-Anstalten*, has a 10.3 percent share. In regards to news, the *ARD tagesschau* has held, for decades, the position of the most popular news program in Germany.

In terms of revenues, public-service media (PSM) can count on a compulsory levy of €17.50 per household, which adds to over €8bn per year. German PSM is among the best vested public-service systems in the world. The *ARD* (radio and television) receives a share of about 70 percent, or €3.6bn, *ZDF* takes €1.8bn, *Deutschlandradio* receives €208m and the Media Authorities, responsible for licensing commercial media, receive more than €143m.

As advertising in public-service television is restricted by federal law to 20 minutes per day (and not allowed on Sundays and public holidays), the revenues from this sector has remained relatively stable within the past decade with about €204m in 2014.

On the contrary, advertising is the major source of income for commercial television. In 2014 revenues reached €4.4bn. Today, German commercial television is basically under the control of two media groups calling themselves the *Senderfamilien* (broadcasting families). One, formerly owned by Leo Kirch, is named *ProSiebenSAT.1 Media SE* and consists of a basket of entertainment, information, and teleshopping channels like *Sat 1*, *Pro 7*, *N24*, *Kabel 1*, *9live*, and others (their market share in 2016 was 27.3 percent).

The second media group is controlled by the German-based giant *Bertelsmann*, the largest media company outside of the US and a global player-also in print: it is the largest bookseller in the world. *Bertelsmann* owns the *RTL Group S.A.*, which distributes TV channels in about a dozen European countries. In Germany, the group includes a basket of entertainment and information channels, such as *RTL*, *RTL II*, *RTL Nitro*, *Super RTL*, *VOX* and N-TV (their market share in 2015 was 28.4 percent).

In 2016 public-service broadcasting had an audience share of 45.2 percent , RTL Group of 23.2 percent and Pro7Sat1 of 18.9 percent, according to the data of the German Commission on Concentration in the Media . In large cities such as Berlin and Hamburg, local commercial TV has been established, operating in niche markets.

With the establishment of commercial television, public access channels (Open Channels) had been implemented in the year 1984. Today, 41 Open Channels (Radio and/or TV) are in place in some *Länder*. They offer non-commercial access to production and distribution technology and serve as a platform for local dialogue.

In the 1990 and the beginning millenium, Open TV-Channels had been discovered by migrants as a source of media and cultural participation. However, discriminating restrictions like the duty to translate drove these TV-producers away. Nowadays, most Open Channels transformed into media education hubs, present on various platforms.

Germany has an above-average percentage of cable households; with 44 percent being cable TV and 46 percent satellite reception. Terrestrial reception via DVB-T (Digital Video Broadcasting – Terrestrial) is available and popular in the bigger cities. Compared to cable and satellite reception, however, it plays a minor role with a total market share of 9.7 percent. The share of IPTV is negligible, at 1.86 percent in 2015.

Finally, the amount of pay TV subscribers is increasing. In 2014 subscriptions achieved €1.7bn in revenues, which constitutes about 25 percent of commercial TV’s total income (not including teleshopping and local networks).

Digital Media

German newspapers are usually available in print and digital versions. The digital version typically consists of a free-of-charge website or a website where parts of the content are hidden behind a paywall-mostly in html format. Additionally, a large number of newspapers offer e-papers for subscribers. Readers have to log in to get access to the original content and layout of the print version (pdf format). The third digital product is the newspaper app, which makes most important contents available on all mobile devices. All products are offered to the subscribers in diverse bundles, such as a cross-media bundle with a printed and a digital version, typically an e-paper. However, the product diversity challenges the publishing houses, as it demands for a complex portfolio, both content- and distribution-wise.

Whereas in the early stages Internet publications served to enhance the profile of printed papers, publishing houses today are desperately searching for ways to establish paid content models such as paywalls, subscriptions, or pay-per-article. Digitisation of the media has, dependent on the target groups, led to diverse requirements and expectations towards convergent media offerings: Content is expected to be available platform-independent on different devices (TV, Internet, mobile phones, etc). Particularly, Internet users prefer multi- and cross-media offerings. Over 53 percent retrieve videos from the web or watch TV on demand, according to *Media Perspektiven* basic data, 2015.

To make matters worse, print and online content present the same topics, but articles in print and online differ widely, due to different media cultures and consumption habits. Hence, online contents need a lot of resources, but are not cost effective. Editorial departments have had to be fused to news desks and concentration processes will probably accelerate, offering chances for the big players like *Axel Springer SE,* who perch themselves to a strict focus on growth in online markets. Hence, debates about subsidies for print have gained popularity in the last decade. One result of this debate is the investigative network *Correctiv*, which is sponsored by citizens, foundations, and official institutions. The network recently gained attention, as it is has chosen to check fake news on Facebook. It has to be mentioned, that *Correctiv* was criticised for not being independent enough.

When user habits are taken into consideration, this online strategy seems to make sense. In 2016 Germans spent over two hours on the web per day. 51 percent of the German-speaking population (aged 14 and older) regularly visits digital versions of newspapers. Digital newspapers are top-ranked among the circulation of the German-speaking web and acquire a reach of over 35 million users. Along with their printed counterparts, newspapers have a total reach of 86 percent of the population. Today, 662 newspaper web offerings are available in Germany. In 2015 the circulation of e-papers reached over 780,000 readers.

Revenues from digital offerings are still marginal, but increasing moderately. In 2015, online advertising as the main source of income reached €1.4m, which is an increase of 6 percent compared to the previous year.

With respect to the German preference for news, the digital environment is no longer a market where traditional news media like newspapers can count on a monopoly. Other players, such as telecom companies or free-mail platforms are popular news distributors. However, journalistic content online is gaining viewers. According to the information platform *Meedia*, the top-220 news offerings reached a new record with 1.69 bn visits in November 2016. Top-ranked is *BILD.de* (with more than 336m visits), followed by *Spiegel-Online*, a very successful outlet of the famous political news magazine *Der Spiegel*, not only large in figures, but also as an important agenda setter.

In terms of the digital broadcasting strategy, public-service radio and television particularly offer a wide range of podcasts and on-demand consumption modes. In order to fulfill their mandate and function in society, they have adapted to current global consumption trends. Public-service media has invested in media centers (*Mediatheken*) and a diversification of special interest programs. The media center of the most viewed program *ZDF*, for instance had about 2.3m visits per day in 2016, according to the report of the chairman of the television company. The *Mediatheken* allow for licence-fee payers (in fact all those residing in Germany) to watch online and adapt the linear programme to their consumption habits, ie by using time-shifting modes or on-demand viewing, for free.

In fact, *ZDF* commissioned an expertise in 2016 in order to benchmark major challenges in the context of mediatisation and online life-worlds. In the same year, *ZDF,* in cooperation with *ARD,* launched the first online-only offering for a young audience: *FUNK*. The channel, which is a multi-platform product, is also designed as an experimentation lab for new formats and contents that could be later applied in the main programmes.

The global shift from linear to digital and the according changes in consumption patterns are reflected clear-cut in the age group of those 14-29 years-old, among whom average viewing time as well as main residence time in traditional linear television is in decline. In this particular age group average consumption is only 183 minutes per day, of which 12 minutes are consumed online. Twenty years ago TV had a reach of 60 percent among the younger audience, while in 2015 only 46 percent were reached on an average day. Youngsters between the age of 12 and 19 prefer online media use, which reflects in the usage patterns of 200 minutes spent online daily, 113 of (mostly linear) television and 83 minutes of radio according to the *Jugend, Information, (Multi-)Media,* (Youth, Information, and (Multi-)Media Study - JIM 2016).

Social Networks

According to Internet World Stats, Germany's Internet penetration is currently 88.4 percent and, with a total of 71 million users, it ranks the highest in the EU. The 28m active social media accounts mean a penetration of 35 percent of the population. Like in other European states, data exploitation is used to create individual user profiles to improve services and, particularly, to develop refined advertising strategies.

The online advertising market reached a volume of over 6 billion users in 2016, with pre-tax revenues reaching a total amount of €2.6bn in 2016 (€2.7bn in 2015). A range of advertising models, such as e-mail advertising, banner advertising, and online/mobile display and video advertising compete with each other, the latter with annual growth rates of about 25 to 30 percent.

Online/mobile display advertising is constantly increasing with net revenues of €1.3bn in 2014. In the advertising cake, online advertising represents 8.8 percent and is ranked among the top four (after TV, print and advertising papers) according to the *Verband privater Rundfunk und Telemedien* (Association of Private Broadcasting and Tele-Media - VPRT).

Facebook is the most used social network, with approximately 22 million users, followed by YouTube and WhatsApp (21 million). Twitter is used by 5.6 million people, as the *We are Social* study indicates. Those who use social media with a personal profile spend an average of 63 minutes daily in their online community. Additionally, smartphones are the preferred devices of 81 percent of Internet users to enter the web.

In Germany the Internet still plays a lesser role in the information repertoires of news searchers, after TV, radio and print. However, search engines, news apps and social media are the main gateways to enter content for German users, according to the data of the Reuters Digital News Survey in 2016. This importance of social media, particularly for younger users, is a key factor for publishers as well as public-service and commercial broadcasters. They strive to make their content available in all platforms, thus building cooperation with social networks. On the one hand, it is inevitable to be present in these evolving markets. On the other hand, it may also raise legal problems, particularly for public-service media, as most of the offerings are regulated by US law. Second, television is still the main source of news consumption, followed by regional newspaper. On average, the Internet is among the least trusted sources of news, only preceded by the yellow press. This is so even among younger audiences. Paradoxically, newspapers are the most trusted but least read by this age group. TV news score in the second rank when it comes to trusted sources.

Facebook's popularity causes another problem that is linked to public opinion and may also add to the low levels of trust in social media. The alarming amount of non-deleted hate speech and fake news on Facebook points to the fact that Facebook is not at all a neutral platform. Instead, it is rather a new player in setting the agenda, which is often influenced by right wing and post-fact ideologies. In fact, journalists demand for transparency of algorithms, because they are convinced of the network's major role in forming public opinion. The German government hence forces Facebook to delete content and both came to the agreement, that the investigative research network *Correctiv* would check Facebook pages for these specific aberrations.

The microblogging service Twitter is established in Germany as an important tool for politicians and journalists to influence public opinion. The politicians with a Twitter account differ among the political parties. 92 percent of the Green Party (*Die Grünen*) parliamentarians have an account, followed by 70 percent of the politicians of the Left Party (*Die Linke*), 60 percent of Social Democratic Party (*SPD*), and 46 percent of the conservative Christian Democratic Party (*CDU*). Politicians in Germany use the microblogging service to imply a sense of modernity and to stage politics in a user-friendly and easily accessible manner. Certainly, the public has, with Twitter, a new tool to react and comment on politicians. It is however questioned if microblogging can in fact serve deliberation, as Twitter is rather a platform for professional journalists than for the usual user. Professional communicators (ie Politicians and Journalists) are able to enhance their profile and their role as gatekeepers in the online world. However, researchers at the University of Koblenz-Landau point out that Twitter is a gatekeeper itself, and as such may influence public opinion.

Opinion Makers

Blogging is popular in Germany. Although verifiable data is missing, from the accounts of the most used platforms and blog softwares it is estimated that there are about 200,000 bloggers in Germany. The approximately 800,000 page impressions (PI) of these blogs outperform the total PI amount of the websites of the quality newspapers or weeklies, *Frankfurter Allgemeine Zeitung* (FAZ.net), *Süddeutsche Zeitung* (SZ online), and *Die Welt* (Welt online). According to the ARD/ZDF Online Study in 2016, 8 percent of the German users visit blogs at least once a week; it can be assumed that blogs have an important influence on public opinion. As reliable research is missing, the following examples only illustrate a subjective selection of blogs that are the topics of debate in a broader public sphere.

Among the blogs that are regularly discussed about in newspapers and broadcasting are those of the right-wing movements. One is *PI-News*, an Islamophobic page with ideologies of the extreme right, founded 2004 by Stefan Herre and now run by the Swiss preacher Christine Dietrich. The blog constantly provokes readers with a scenario of the “Islamisation of Europe” and had more than 60,000 visits per day in 2011. It is agitating against Muslims, but also against non-Muslims, and scientists who try to establish a more differentiated perspective of the multi-cultural society. Obscure blogs are also popular, like those from the “truth movement”. One example is *Grenzwissenschaften-aktuell.de,* which creates its own realities different from those of official science.

The political blog *Nachdenkseiten.de* is run by Albrecht Müller and rather situated to the left of the political spectrum. The blog had its first entry in 2003 and strives to be a critical website that offers information, “apart from the official spin control in the media” and thus aims to create a counter public. It was founded as a reaction to neo-liberal lobbying and can be perceived as one of the few political websites that are acknowledged in a broader public sphere.

It can be observed that political and media critical blogs are influential. One reason may be the decline of journalistic media critique that fell prey to the austerity policy and media crisis.

Netzpolitik.org is a blog that steps in for public freedom in the web and against surveillance, it also covers all web-related policy issues like web neutrality. The blog was founded and is run by Markus Beckedahl, who perceives the blog as a mix between an NGO and a medium. It is based on solid research and a factual tone. The influence of *Netzpolitik.org* grew in recent years to an extent that members of the team are regularly invited as experts in official commissions, like recently in the parliamentary commission about the influence of social bots in politics.

According to recent events in public-service media regulation, the **Intitiative für Publikumsräte** (Initiative for the Establishment of Audience Councils) , became an influential voice in media policy. It demands for more participatory structures in PSM and in media regulation and introduces new perspectives to the otherwise rather corporatist media system, as well as co-determination. The initiative was founded in 2013 after the household licence fee was established by Christine Horz and Sabine Schiffer, who perceive the blog as a public science project to address the user as a citizen and establish media policy issues within a broader public.

Sources

Newspapers/Magazines (selection)

- **Berliner Morgenpost**
- **BILD**
- **Der Spiegel**
- **Der Tagesspiegel**
- **Die Welt**
- **Die Zeit**
- **Frankfurter Allgemeine Sonntagszeitung** (FAS)
- **Frankfurter Allgemeine Zeitung** (FAZ)
- **Frankfurter Rundschau** (FR)
- **Hamburger Abendblatt**
- **Handelsblatt**
- **Hürriyet**
- **Junge Welt**
- **Nürnberger Zeitung**
- **Stuttgarter Zeitung**
- **Süddeutsche Zeitung** (SZ)
- **Tageszeitung** (TAZ)
- **Westdeutsche Allgemeine Zeitung** (WAZ)

Publishers (selection)

- **Axel Springer SE**
- **Bauer Media Group**
- **Bertelsmann**
- **Burda Media Group**
- **DuMont**
- **Funke Media Group**
- **Holtzbrinck Publishing Group**
- **Madsack**
- **Südwestdeutsche Medienholding**

Radio (selection)

- **Bayern3**
- **Deutschlandfunk**
- **Deutschlandradio Kultur**
- **Klassik Radio**
- **NRJ**
- **SWR3**

Television (selection)

- 3Sat
- 9live
- ARD
- Arte
- BR
- Kabel 1
- Kika
- N24
- NDR
- N-TV
- Phoenix
- Pro 7
- RBB
- RTL
- RTL II
- Sat 1
- Sky
- Super RTL
- VOX
- WDR
- ZDF

Opinion Makers (selection)

- Grenzwissenschaft-aktuell.de
- Nachdenkseiten.de
- Netzpolitik.org
- PI-News
- Publikumsrat.de

Organisations

Trade Unions

Journalists and employers in media organisations are well organised and both have their own lobbying groups. On the journalists side there are two major organisations. First, the *Deutscher Journalisten Verband* (German Journalists' Association - DJV), calling itself a "trade union and professional organisation." The other journalist union is the *Deutsche Journalistinnen- und Journalisten-Union* (German Journalists' Union - DJU), part of *Ver.di*, the largest service-workers' and clerks' trade union, which is in turn a member of the roof organisation *Deutscher Gewerkschaftsbund* (German Trade Federation - DGB), which has a powerful influence in German policy. The *DJV* is organised into 17 different, self-governed, federal organisations, operating in each federal state. It is further segmented into several commissions according to the different professional branches. With respect to the claim of being a professional organisation as well, the *DJV* offers dossiers on thematic issues such as ethics in journalism.

DJU has nine special divisions in the federal states and, as a clear-cut trade union, it is focused on specific services such as collective bargaining and sections for newcomers and freelancers.

Apart from journalist associations, employers like the publishers are organised in the *Bundesverband Deutscher Zeitungsverleger* (BDZV) and the magazine press is represented by the *Verband Deutscher Zeitschriftenverleger* (VDZ). The commercial radio and television industry cooperates in the *Verband Privater Rundfunk und Telekommunikation* (VPRT). All three organisations lobby for commercial media and act as main critics of publicly funded public-service media with the argument of a distortion of competition.

Journalist Associations

Apart from trade unions there are a few other associations with either a local or a topical focus. The *Frankfurter Presseclub* (Frankfurt Pressclub – FPR) is located in the city of Frankfurt am Main. The association is composed of 315 single members and 345 corporate members from media organisations in and around Frankfurt. The club offers exclusive and open panel discussions and information events. It perceives itself as an independent network that collaborates with other parts of society like local politicians and businesses.

Freischreiber (Freewriters) is a lobby for freelancers. It offers regular tables in the bigger cities in order to establish information hubs for current legal developments, but also to form social circles as informal information networks.

The *Neue Deutsche Medienmacher* (New German Media Makers – NDM) is a nationwide network of journalists and media professionals with either a migrant background or who identify themselves as belonging to the post-migrant society. The overall aim of NDM is to increase diversity in the media and to fight misconceptions about immigrants. NDM is running local clubs and provides support and vocational training for migrant journalists. A training project for exiled journalists started recently.

Pro Quote (Pro Quota) is an association that lobbies for an increase of female journalists. The organisation noticed a gender gap in the public debate, in wages and in career options. It strives to enlighten a broader public and pleads for a 30 percent quota of female journalists in editorial offices.

News Agencies

Germany is among the countries with the highest amount of press agencies in its own language, which is one reason for the high competition in this segment. The main and internationally-active agency is the *Deutsche Presseagentur* (DPA). As most newspapers are subscribers of the DPA, it can be regarded as the primary source of news, whereas the other news agencies are complementary sources. The shareholders of the DPA are solely media companies and broadcasting stations, for which it has been criticised as not being independent enough. The DPA has also come into focus content-wise. One example is criticism about the DPA's journalism during the crisis of the financial market in 2008, where it was accused of having published biased and sloppy reporting. As a result, big newspapers like the regional WAZ cancelled their *DPA* subscription.

The US American Associated Press (AP) merged in 2009 with the German Cable Service (DDP) into DAPD, which had a market share of 18 percent in 2011. Sports-Information-Service (SID) reached an 8 percent market share and the KNA, the Catholic news agency, a 7 percent share in 2011. Agence France Presse (AFP) and the German Reuters, which is a complete subsidiary company of the British Reuters and the Protestant News Agency (*EPD*) are also important in the German market.

Audience measurement organisations

Gesellschaft für Konsumforschung (Society for Consumer Analysis - GFK) is the primary organisation in charge of television measurement. It was established in 1935 in Nuremberg and introduced its GFK Meter in 1963, which transmits the viewing figures to the market research institution. The technical tool is linked to TV sets in a representative sample of 5,500 households in Germany and takes the measurement to the split second. However, the GFK panel has been criticised, because it does not measure the viewing figures of the migrants in Germany. Second, is criticised for not being transparent about the selection criteria and lacking reliability.

The public-service broadcasting ARD founded an association for investment in advertising in 1970. The ARD Sales & Services established a media analysis section that regularly publishes the latest data and interpretations related to the media (press, TV, radio, and Internet), as well as user trends in the special interest magazine *Media Perspektiven*. Articles are free of charge and published on the website.

Sources

Trade Unions

- **Association of Commercial Broadcasters and Audiovisual Services (VPRT)**
- **Federation of German Newspaper Publishers** (BDZV)
- **German Association of specialised Journalists** (Deutscher Fachjournalisten Verband, DFJV)
- **German Journalists Association** (DJV)
- **German Journalists Union** (DJU)
- **German Magazine Publishers** (VDZ)

Journalists' Associations

- **Frankfurter Presseclub** (FPC)
- **Freischreiber**
- **Neue Deutsche Medienmacher** (NDM)
- **Pro Quote**

News Agencies (selection)

- **Agence France Presse** (AFP)
- **Associated Press** (AP)
- **Deutsche Presseagentur** (DPA)
- **Evangelischer Pressedienst** (epd)
- **Katholische Nachrichten Agentur** (KNA)
- **Mediendienst Integration**
- **Reuters**

- **Sport-Informations-Dienst** (SID)

Audience-Measurement Organisations

- **GFK**

Other media outlets

- **Association of Investigative Journalists and Editors** (Netzwerk Recherche)
- **Die Medienanstalten**

Policies

Media legislation

The structure of the German media system is set by the federal state. Particularly, broadcasting is shaped by both the Federal Government and the Federal Constitutional Law.

Free speech rights, a free press and program sovereignty of broadcasting are explicitly set in Art. 5 of the German Basic Law (Constitution) from 1949.

Since 1961, the Federal Constitutional Court specified the rather vague instructions of the constitution and, by doing so, developed important principles. The electronic media offer comprehensive information and reflect the diversity of the existing spectrum of opinions, which particularly holds true for PSM. According to the highest German court, PSM are obliged to follow a serve-all principle with a clear educational mandate. PSM are a reference for the public debate and should provide fundamental services, comparable to what is called the “Reithian-Trinity”: information, education and entertainment. Important decisions are, for example, those that deal with the influence of political parties in broadcasting. The first (1961), as well as the latest (2014), verdicts claim that public-service broadcasting should be distant from the state.

In contrast, commercial broadcasting is not equipped with a comparable mandate. Therefore, in order to fulfil their task, PSM are funded by broadcasting fees.

In Germany the nationwide media laws have to be settled by an agreement between the different *Länder*. In its first decision on the matter, the Federal Constitutional Law decided that broadcasting responsibilities rest within the states, according to Germany’s federal structure. This is especially true for broadcasting laws, which are elaborated as so-called interstate treaties (*Rundfunkstaatsverträge*).

For example, the 15th *Rundfunkstaatsvertrag* consolidated the paradigm shift in the financing of PSM from a pay-per-device model to a compulsory levy per household in order to adapt PSM financing to the digital media environment and prevent free-riders who watch from mobile electronic devices.

The latest crucial decision of the Federal Constitutional Court took place in 2014. At the time, it was confronted with the question of whether the composition of broadcasting councils in PSM and the existing political influence was compliant with the constitution. The Federal Constitutional Court finally limited the share of politicians in the broadcasting councils to a third of all members.

While broadcasting legislation is oriented more to the common good and the needs of the public sphere-although it has to increasingly comply to EU requirements of competition laws-legislation for press and online media is oriented solely to the market model of competition. Additionally, special legislation is made to protect individual rights of privacy. Press laws are made at the *Länder* level as well. However, several attempts to pass a framing law for all regional press laws have failed.

Accountability systems

The *Deutscher Presserat* (German Press Council) , established in 1956, consists of an equal number of representatives from the journalists' organisations and the publishers' organisations (28 in total). Members of the general public may appeal directly to the Council to complain if they think journalistic standards are being violated. If the Council supports the complaint, the respective newspaper is expected to publish the Council's ruling. The decisions are taken on the foundation of the *Pressekodex* (Press Codex), which is a 16-point guideline respecting ethical values and, as such, setting professional standards. It is regularly renewed according to the recent journalistic developments. The effect of this self-regulation is limited, especially in relation to the practices of the yellow press.

The *Deutscher Werberat* (German Advertising Council) is a similar organisation, consisting of approximately 15 representatives from the advertising industry, the media, and the advertising agencies. They publish their decisions on complaints in a handbook.

Official complaints against the public-service broadcasting have to follow a specific complaint procedure. The complainant first has to point out in a letter why exactly he/she thinks that general values, regulations, laws or the self-defined standards of a broadcasting organisation are being violated. After six weeks he/she will receive an answer from the director. If the answer is not seen as sufficient, he/she could write a second letter, which only then will reach the Broadcasting Council and be discussed. After some time, he/she will receive an answer from the Council.

In commercial broadcasting media all television companies are obliged to employ a *Jugendschutzbeauftragter* (Commissioner for Youth Protection), who reports only to the internal structures.

Some media, especially newspapers, have special media sections that contribute to more transparency for the audiences, but that are not strong in media criticism. Finally, journalists' organisations like the *Netzwerk Recherche* (Network for Investigative Journalism) are trying to improve the quality of journalism.

Regulatory authorities

It is determined in the German Constitution that the *Länder* are exclusively equipped with the mandate to regulate electronic media. The Federal Constitutional Court defines specific obligations to be observed by state legislation dealing with the broadcast medium. The regulation is under a positive duty to enact rules ensuring that television and radio will serve the purpose of promoting the free formation of individual and public opinion. This aim is promoted by a standard of a "balanced diversity" of all broadcast programs; the communication law has to establish a framework that will allow for different viewpoints to gain access to the medium. Such a standard mandates safeguards against concentration of ownership in the broadcasting industry and the accumulation of power to dominate public opinion. For this reason, the legislative bodies of the *Länder* are specifically obliged to provide for mechanisms that will contain media outlets’ concentration of control, as KEKpoints out.

The organisational and legal structure of broadcasting corporations is defined in *Länder* laws and, if more than one state is involved, in agreements between several or all *Länder*. A basic agreement of all *Länder* (*Rundfunkstaatsvertrag*) defines the general broadcasting conditions, as far as both the public and the commercial sectors are concerned.

Supervisory councils are important in both the public and private sector. All PSM corporations are governed by an ideally independent *Rundfunkrat* (Broadcasting Council), whose representatives are supposed to reflect the “socially relevant groups” of society, according to a Federal Constitutional Court’s ruling. Broadcasting Councils oversee the fulfilling of program standards and elect the director of a broadcaster, whereas Broadcasting Boards mainly decide on financial and personnel issues. Both bodies follow a representative democracy model. The council members are representatives of “relevant social groups”, like official representatives, employer and trade associations, employee organisations and unions, churches and educational institutions. The representatives are mandated to represent the general public and not their sending organisation. Aside from this process, there is no possibility for the broader public or civil society to participate in media governance.

With the advent of commercial broadcasting, all *Länder* drafted media laws (in addition to the existing broadcasting laws) in the 1980s. These laws specifically regulate the electronic media outside the conventional public-service corporations, mainly by distributing commercial radio and TV licences, and deciding which programmes may be fed into cable systems. For this purpose new supervisory bodies (*Landesmedienanstalten*) were created, each with a council resembling those of the public-service broadcasters. All in all, 14 such bodies are active in 2016. Because of the strong federal element, some TV and most of the radio is regional or even local.

Sources

- **Association of Commercial Broadcasters and Audiovisual Services (VPRT)**
- **Commission on Concentration in the Media (KEK)**
- **Federal Constitutional Court** (Verfassungsgericht)
- **Federal Network Agency** (Bundesnetzagentur)
- **German Advertising Standards Council** (Deutscher Werberat)
- **German Journalists Association** (DJV)
- **German Journalists Union** (DJU)
- **German Press Council** (Deutscher Presserat)
- **Medienanstalten**
- **Ministries for Culture in the *Länder*, for instance Ministry for Family Children,**

Education

Universities and schools

Journalism education in Germany is institutionalised in several bodies. Traditionally, journalists-to-be take part in and successfully complete a two-year internship within a publishing house or in broadcasting corporations. This professional experience has to be completed with additional courses within a journalist’s academy, with further vocational training. The biggest one of these is the *Akademie für Publizistik* in Hamburg.

Additionally, several universities also offer degrees in Journalism Studies (Hamburg, Dortmund, Leipzig, and Eichstätt, among others). Journalism education is also offered in independent journalism schools (such as in Munich), and in schools owned by media houses, like the Axel Springer Academy. With the growing amount of commercial media outlets and the increasing importance of online journalism, the landscape of journalism is more and more scattered, and the degree of education among journalists varies heavily.

Germany does not have a strong tradition of media-related NGOs. Media issues are dealt with within each party's' political foundations. Media research is hosted by a vast variety of institutions, like university-based institutes, media research divisions of both public and commercial broadcasters, and independent research institutes such as the GfK and Nielsen Media Research.

Professional development

If journalists work as freelancers or with fixed contracts in a media organisations they can take part in internal vocational training if the organisation is big enough to conduct a training unit. The public-service broadcasters ARD and ZDF jointly conduct the *ARD/ZDF Medienakademie* for their employees, which constantly offers new courses designed to meet the requirements of journalists in an ever-changing professional environment.

Official data from the work agency (*Arbeitsagentur*) assumes that there were over 96,000 journalists with fixed contracts in 2015. The professional organisation DJV, however, counts less than 50,000 journalists with stable working conditions, plus 26,000 freelancers and 3,000 trainees. Most journalists work for printed dailies, followed by employees in broadcasting and print magazine. In 2014 the work agency counted over 5,300 jobless journalists.

Sources

- **Academy of Journalism (Akademie für Publizistik)**, Hamburg
- **ARD/ZDF- Media academy**
- **Axel Springer Akademie**
- **Die Deutsche Journalistenschule**
- **German Journalism School** (DJS), München
- **Henri Nannen Journalism School**, Hamburg
- **Institute of Journalism and Communication Sciences**, University of Hamburg
- **Institute of Journalism**, Catholic University Eichstätt
- **Institute of Journalism**, University of Technology Dortmund

Traditional forms of communication

Summary

Sources

Conclusions

Conclusion

The German media landscape is very dynamic and diverse. Television has not lost its dominant role in the German media system, which is also reflected in advertising revenues.

Regulations and media politics have been stirred by the recent decisions of the Federal Broadcasting Court and a public that demands to be more included in media governance, with the current focus being on the reform of PSM. Several commissions debate about the future of PSM and how it can translate its mandate and dominant role into current challenges and changes, like the converging media and changing user habits and expectations.

Still, journalists and professionals alike seem to rediscover quality in journalism as a topic valuable to discuss and develop further. On of the main task will be to keep up the relatively high quality of journalism in a cross-media environment and develop new income strategies.

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