



# Berlin State Of Mind



# OR: WHY BERLIN?



DIE WELT



28.11.01

# Senatsverwaltung schreibt Stadtquartier Chausseestraße aus

## "Silicon Chaussee" in Berlin Mitte

0
 
 Empfehlen 0
 Twittern 0
 g+1 0

Die Senatsverwaltung für Stadtentwicklung hat ein Interessenbekundungsverfahren für das neue Stadtquartier Chausseestraße eröffnet. Das Gelände des ehemaligen Stadions der Weltjugend in Mitte soll zu einem hochwertigen innerstädtischen Quartier mit einer kleinteiligen Mischung von Wohnen und Arbeiten entwickelt werden. Darüber hinaus werde dort eine 3

# 2001: Silicon Chaussee? (!)

Die City Ost ist nur wenige Minuten entfernt und über öffentliche Verkehrsmittel mit dem Areal eng verbunden. Viele kleine Start-up-Unternehmen, vor allem aus der New Economy, haben hier ihren Sitz und den Begriff "Silicon

ANZEIGE

**San Sebastian**
  
 Kulturhauptstadt
   
 Europas
   
 2015

**GTEC**
  
 Berlin Tech
   
 Entrepreneurship Center



**Anno 2002**





**NOBODY IS PERFECT  
....I'M NOBODY**

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HENRY BARBER, Commander, AT PIER 13 EAST RIVER.

This elegant Clipper Ship was built expressly for this trade by Samuel Hall, Esq., of East Boston, the builder of the celebrated Clippers "SURPRISE," "GAMECOCK," "JOHN GILPIN," and others. She will fully equal them in speed! Unusually prompt dispatch and a very quick trip may be relied upon. Engagements should be completed at once.

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Messrs. DE WITT KITTLE & CO.

RANDOLPH M. COOKE, 55 Wall Street, New York

NESBIT & CO., PRINTERS.

# Anno 1848



**55% + 40.000 p.a.**



**45%**



**3/4**



**80%**

**Anno 2013**



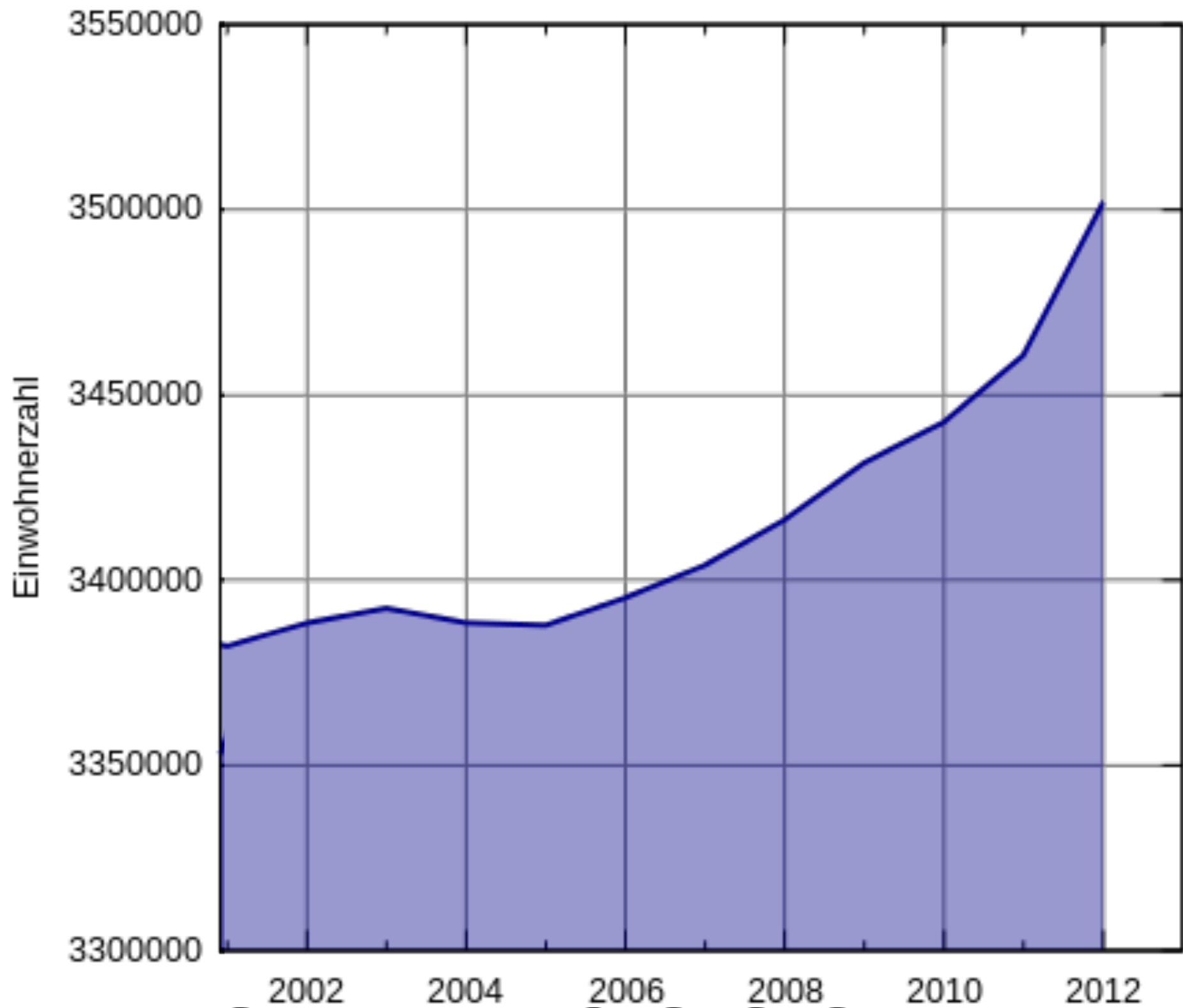
**19%**  
Mid-  
2000's

Berlin's digital companies  
are international. **>15%**  
the share of foreigners  
in regular jobs

62.000+ new jobs  
by start-ups  
(or 3.4% of current jobs)

**11%**  
2014

# Unemployment



**Now: 3,5m 2030: 4m+ ?**



=



# Equal # Catholics & Muslims

**BELIEVE IN YOURSELF**

**60%+ non-denominational**

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MAY 15, 2014

## SO LONG, ISRAEL; HELLO, BERLIN

BY SALLY MCGRANE



CULTURE DESK



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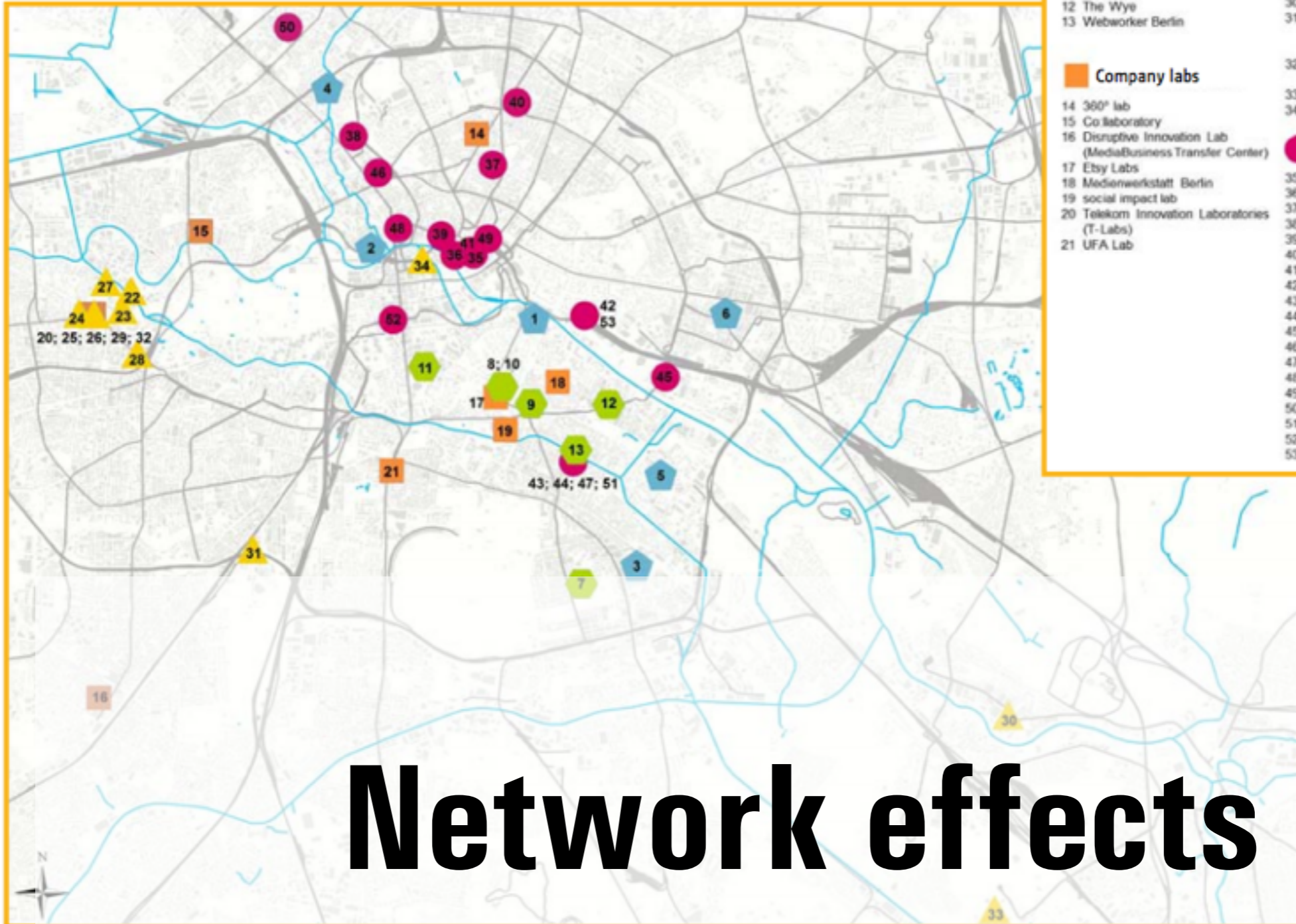
E-mail address  **SIGN UP**

**20.000+ and 400 every year**



# Strong B2B Focus

**CLOSELY LINKED: LABS, INCUBATORS AND ACCELERATORS**



- |                                   |  |
|-----------------------------------|--|
| <b>Grassroot labs</b>             | <b>Research-based labs</b>   |
| 1 c-base                          | 22 3D Innovation Center (Fraunhofer Heinrich-Hertz-Institut)                             |
| 2 Chaos Computer Club Berlin e.V. | 23 3D-Labor (TU Berlin)  |
| 3 Ida Nowhere                     | 24 Charlottenburger Innovations-Centrum (CHIC)   |
| 4 Raumfahrtagentur                | 25 DAI-Labor (TU Berlin)   |
| 5 Trial & Error Kulturlabor       | 26 Daimler Center for Automotive Information Technology Innovations (DCAITI) (TU Berlin) |
| 6 Vitomat                         | 27 Design Research Lab (UdK Berlin)  |
|                                   | 28 Discover Markets (Fraunhofer-Gesellschaft)  |
|                                   | 29 EICT European Center for Information and Communication Technologies                   |
|                                   | 30 gameslab (HTW Berlin)   |
|                                   | 31 Knowledge and Innovation Communities - Climate-KIC Deutschland                        |
|                                   | 32 Knowledge and Innovation Communities - EIT ICT Labs                                   |
|                                   | 33 PVcomB  |
|                                   | 34 Sound Studies Lab (HU Berlin)   |
|                                   | <b>Incubators &amp; accelerators</b>   |
|                                   | 35 Berlin Start-Up Academy   |
|                                   | 36 BeVation  |
|                                   | 37 Covus Ventures  |
|                                   | 38 Found Fair Ventures   |
|                                   | 39 Founder Institute   |
|                                   | 40 FoundersLink  |
|                                   | 41 HitFox Games Ventures   |
|                                   | 42 hub-raum  |
|                                   | 43 M Cube  |
|                                   | 44 MAS Angel Fund  |
|                                   | 45 rugg.ad   |
|                                   | 46 Project A Ventures  |
|                                   | 47 Rheingau Founders   |
|                                   | 48 Rocket Internet   |
|                                   | 49 Springstar  |
|                                   | 50 Startup Camp Berlin   |
|                                   | 51 Startupbootcamp Berlin  |
|                                   | 52 Team Europe   |
|                                   | 53 YOU IS NOW  |

**Network effects**

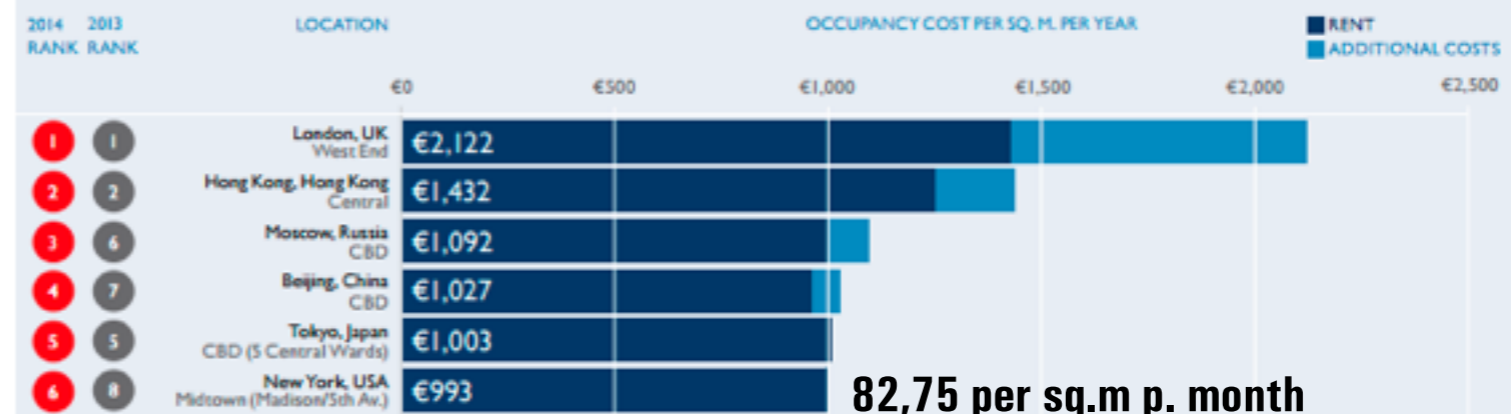
# OFFICE SPACE ACROSS THE WORLD

A Cushman & Wakefield Research Publication



2014

## MOST EXPENSIVE LOCATIONS BY COUNTRY (€/SQM/YEAR)



**NYC: 3.8x more**  
**expensive**  
(London 8x!)

**Germany, Berlin EUR/sq.m/mth 22.00**

# Office Rent in 2014



**SHOW ME THE**

**MONEY!!!!!!!**



Less is More

The  
Economist

## “Vorsprung durch exports”

Over the past decade Germany had the fastest growth in GDP per person among the G7 club of rich economies; America was in only fifth place

Berlin beats Bay Area

The IMF forecasts that Germany will also have the fastest growth in GDP per head over the next five years.

Germany is the only G7 economy whose share of world exports has not fallen since 2000, despite Chinese competition.

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Battery Ventures

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PARTNERS

Balderton.  
capital

**DN** Capital®

Sunstone

 **MANGROVE**  
CAPITAL PARTNERS

 **PARTECH**  
*International*

Index  
Ventures

**Global VCs**  
**increasingly invest**

# German ventures have attracted high volumes of funding

Top 30 start-ups located in Germany (based on cumulated value)

#	Target name	Location	Target profile	Founding year	Total funding value
1	<b>Delivery Hero</b>	Berlin	Food delivery service	2011	USD 656.7 million
2	Bigpoint.com	Hamburg	Online games	2002	USD 460.5 million
3	BestSecret.com	Aschheim	Shopping community	2007	USD 248.0 million
4	WestWing	Munich	Home & living retailer	2011	USD 149.1 million
5	<b>SoundCloud</b>	Berlin	Music streaming	2007	USD 123.3 million
6	<b>Foodpanda</b>	Berlin	Food delivery service	2012	USD 108.0 million
7	<b>Wimdu</b>	Berlin	Private accommodation	2011	USD 90.0 million
8	<b>HelloFresh</b>	Berlin	Food boxes	2011	USD 67.5 million
9	Kredittech	Hamburg	Big data credit scoring	2012	USD 63.0 million
10	<b>Auctionata</b>	Berlin	Online auctions	2012	USD 50.0 million
11	GetYourGuide	Berlin, Zurich	Travel recommendations	2009	USD 45.5 million
12	Internetstores	Esslingen	Multi-store e-commerce	2007	USD 39.9 million
13	<b>Quandoo</b>	Berlin	Online reservation platform	2012	USD 39.5 million
14	<b>NumberFour</b>	Berlin	SaaS services	2009	USD 38.0 million
15	Open-Xchange	Nuremberg	Communication software	2005	USD 37.8 million
16	<b>Webtrekk</b>	Berlin	Data intelligence solutions	2003	USD 35.1 million
17	<b>ResearchGate</b>	Berlin	Academic network	2008	USD 35.0 million
18	<b>Azubu</b>	Berlin	Media sports company	2011	USD 34.5 million
19	<b>SumUp</b>	Berlin	Payment system	2011	USD 33.0 million
20	<b>Wooga</b>	Berlin	Online games	2009	USD 32.2 million
21	<b>GoEuro</b>	Berlin	Travel search engine	2012	USD 31.0 million
22	<b>MisterSpex</b>	Berlin	Glasses retailer	2007	USD 29.7 million
23	Auxmoney	Dusseldorf	Peer-to-peer lending	2007	USD 28.0 million
24	Netbiscuits	Kaiserslautern	Cloud platform for app development	2000	USD 27.0 million
25	<b>Zimory</b>	Berlin	Cloud technology	2007	USD 25.5 million
26	<b>6Wunderkinder</b>	Berlin	Task-Manager application	2010	USD 23.9 million
27	Simfy	Cologne	Music streaming	2006	USD 23.0 million
28	<b>Onefootball</b>	Berlin	Football community	2008	USD 20.1 million
29	<b>AppLift</b>	Berlin	Mobile games marketing	2012	USD 20.0 million
30	<b>Winkel.n.de</b>	Gruenwald	Baby products	2010	USD 19.6 million



# ROCKETINTERNET



Berlin  
agglomeration

4.4m

1.1b  
USD

≈ 250 USD  
per capita



New York  
agglomeration

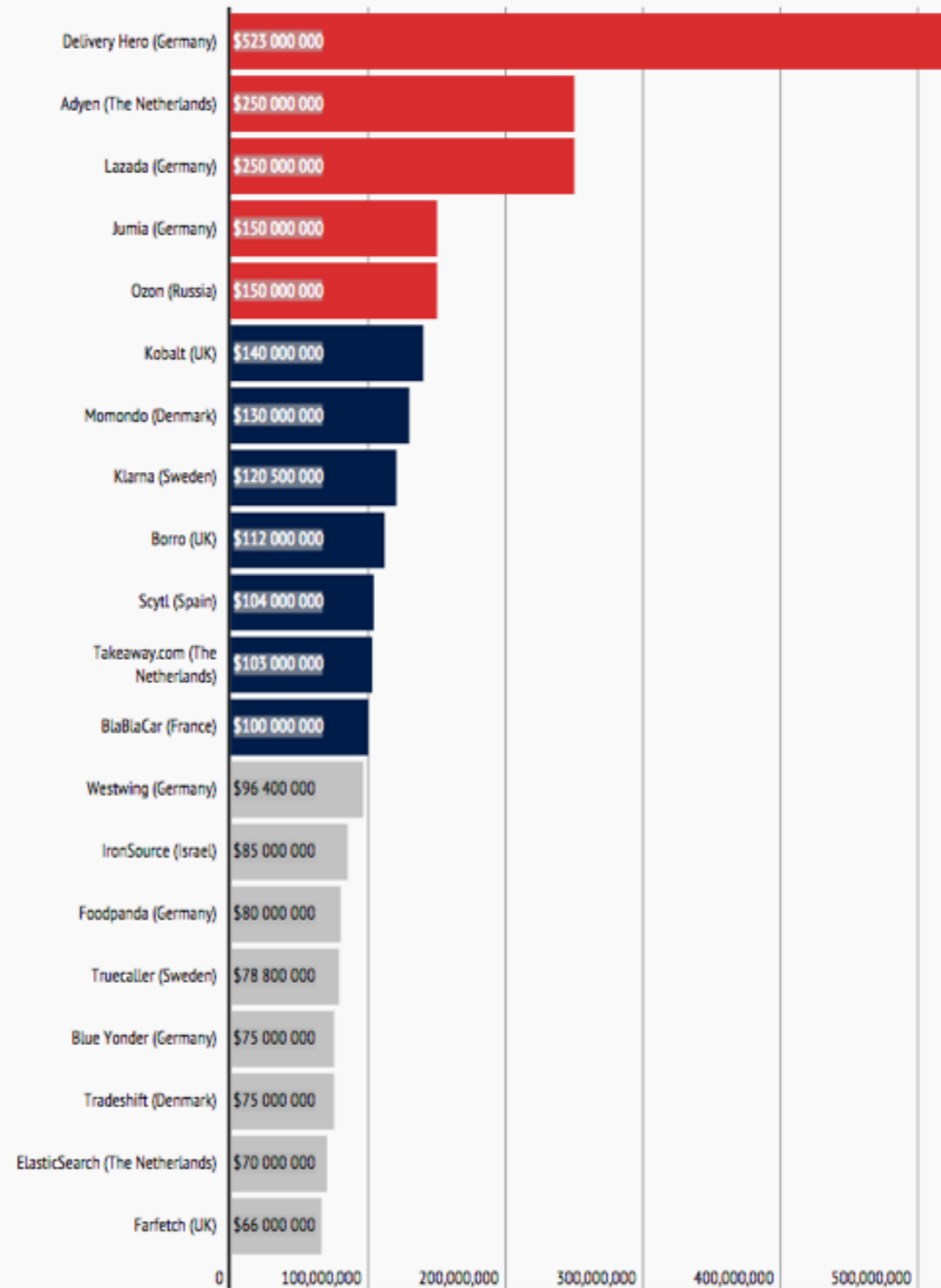
20m

5b USD

≈ 250 USD  
per capita

still, way  
to go!

### The 20 biggest EU tech funding rounds in 2014 (in USD)

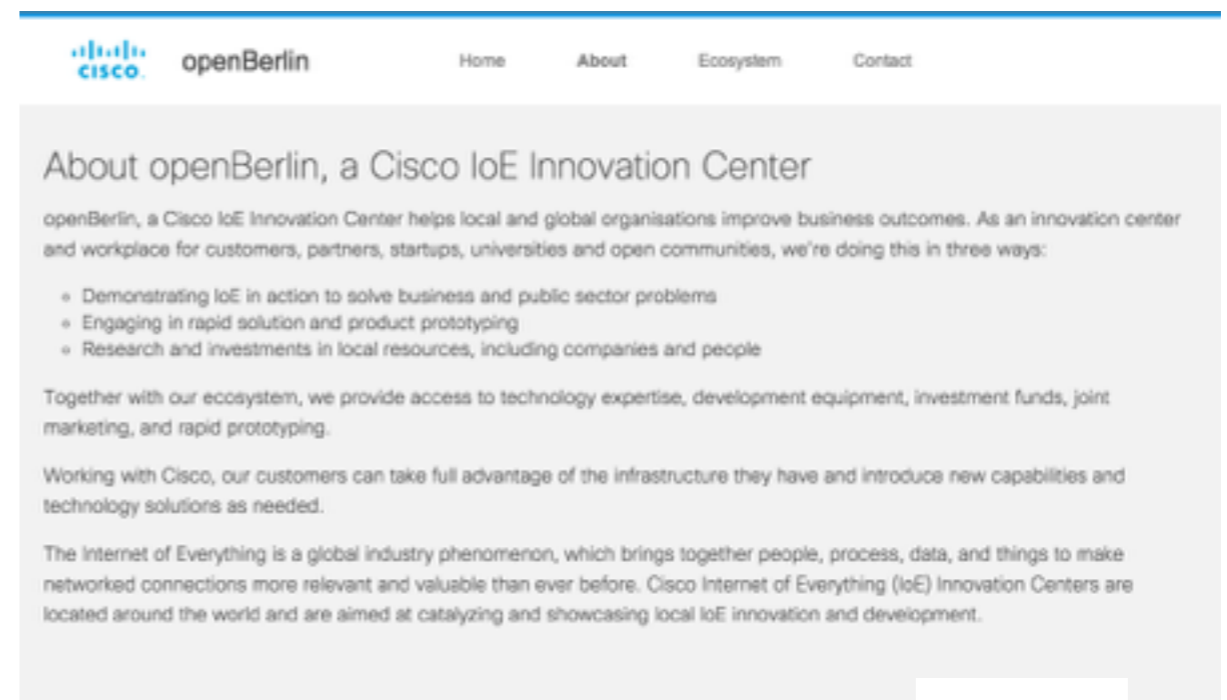




# OmnicomGroup

Omnicom acquires Berlin-based digital transformation agency TLGG

**Mission:** transform corporations; globally!





**GTEC**

German Tech  
Entrepreneurship Center  
Berlin

**Forbes**

Germany's 'One Stop  
Collaboration Shop'  
for European  
Startups.

August 2015



**GTEC** German Tech  
Entrepreneurship Center  
Berlin



# FALLING WALLS

Berlin 8/9 November  
The International Conference on Future Breakthroughs in Science and Society

PROGRAMME

SPEAKERS

REGISTRATION

FELLOWSHIPS

VIDEOS

WHICH ARE THE NEXT WALLS TO FALL?

FALLING WALLS  
CONFERENCE

FALLING WALLS  
LAB

FALLING WALLS  
VENTURE

FALLING WALLS  
CIRCLE



**Falling Walls Venture is a global forum for science based start-ups, to present their breakthrough business concepts to high profile investors, opinion leaders and a distinguished jury.**

# LEADERS CONNECTED

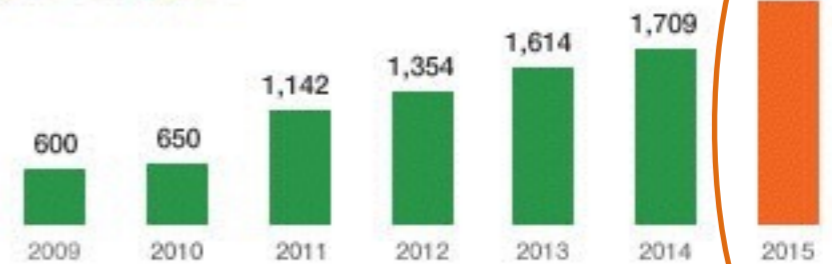
# NOAH

## CONFERENCE



### ATTENDEE NUMBERS

NOAH London ■  
NOAH Berlin ■



**Going from...**

**Good**

To

**Great**



**Median Age Advanced\***

**London Startups: 8 years**



# Stockholm: Europe's Start-Up Superstar

**Median Age**

**Stockholm Startups: 7 years**

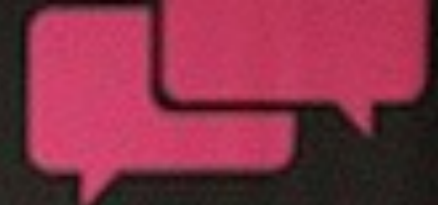


## **Median Age**

**Rest-Of-Europe Startups: 7 years**



# INTERNET & START-UPS IN DEUTSCHLAND



**Median Age Advanced**  
**Berlin Startups: 4.5 years**







## Critical ecosystem factors\* rated for Berlin\*\*

Optimism & Belief ("Silicon Valley")	3/6
Mentorship + Education (Knowledge)	3/6
Universities + Companies (People)	3/6
Capital, Legal, Finance (Infrastructure)	2/6
Engineering + Design (Product)	3/6
Platforms + Distribution (Customers)	4/6
Payment Systems (Monetization)	5/6
IPO / M&A Market (Exits)	2/6





# BIG BANGS

# create ecosystems

# TOP 3 WHAT'S NEEDED:

- Growth Funds for 20-50m+ investments
- More M&A activities by local corporates
- Tax benefits / reduction for Angels and LPs<sup>\*</sup>



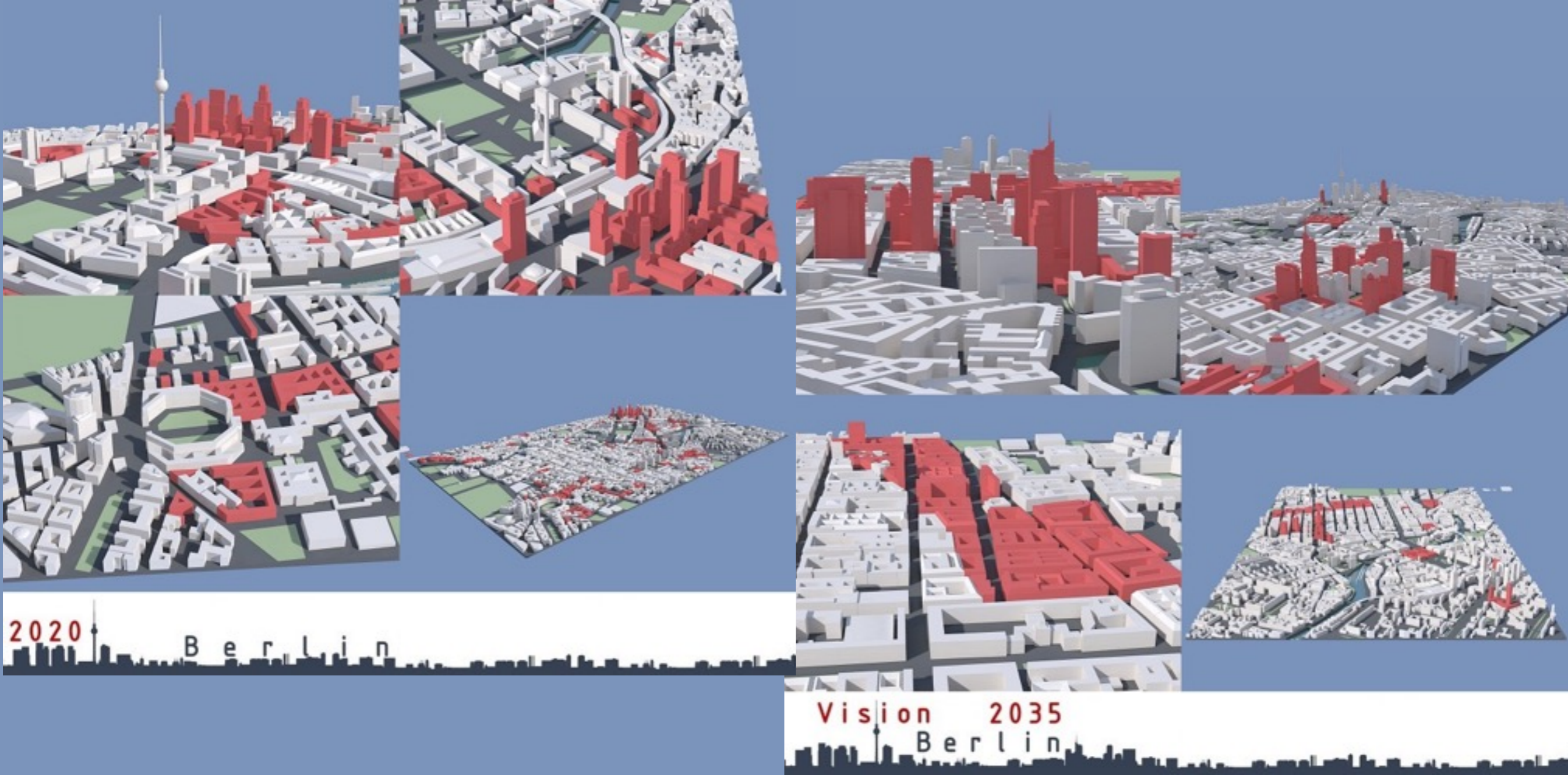
**HEY ? GUESS WHO CARES**

**?**

**BERLIN - next Silicon Valley?**

**NOT ME ( :**





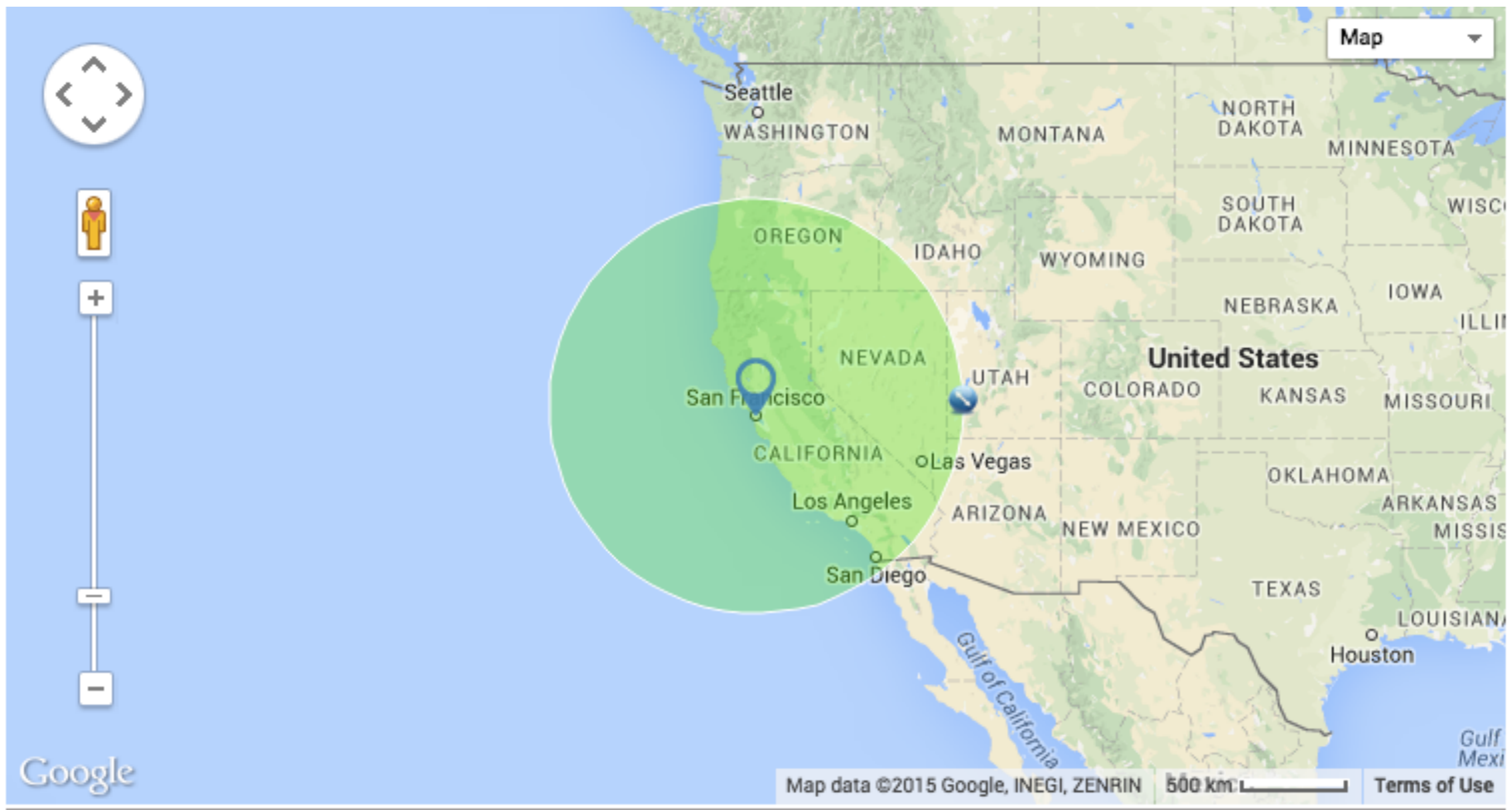
**BERLIN = NEXT BERLIN**

The entire city  
is a start-up!





# Growing the ecosystem



approx 1.30h flight time radius







approx 1.30h flight time radius





Poland: A promising startup ecosystem with success stories and a few teething problems



Warsaw

Five high-growth tech companies are leading the way for a new – and very different – Croatia



Zagreb

# Entrepreneur

Hipsters and High-Tech Start-ups

The Czech capital city of Prague has a thriving tech start-up scene. Met 12 start-ups that are changing the world.



Prague

Bucharest



OOKLA SPEEDTEST			4/15/2015 9:56 AM GMT
DOWNLOAD	UPLOAD	PING	
927.51 Mb/s	211.29 Mb/s	2 ms	
GRADE: A+			(FASTER THAN 99% OF RO)
ISP: TELEKOM ROMANIA ***			
SERVER: BUCHAREST (< 50 mi)			

# All eager to connect with Berlin

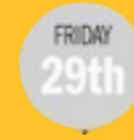
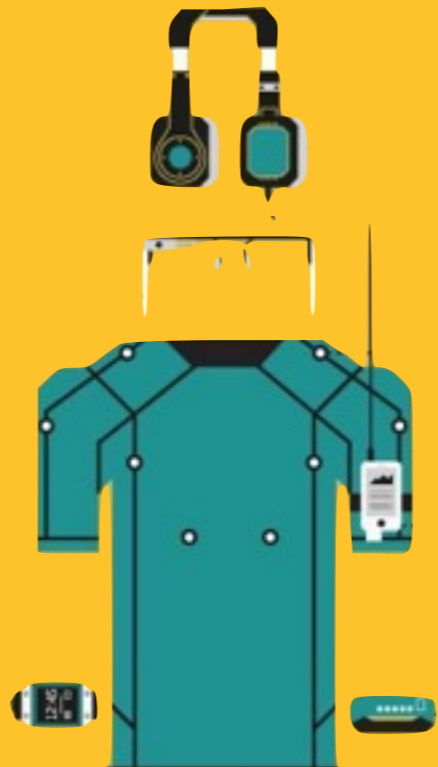
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#US +1 202 299 4072

# Trends TOP 5





# WEARABLE TECHNOLOGY





# Travel

Accelerating Digital Technology

Super-Convergence

Reboot

64M



# Digital Health

Based on the work of Dr. Eric Topol, author of "The Creative Destruction of Medicine: How the Digital Revolution Will Create Better Health Care"

1980 1990 2000 2010



```
1 if(parameters.contains("name")){  
2   hql += " and p.name = :name";  
3 }  
4  
5 if(parameters.contains("age")){  
6   hql += " and p.age = :age";  
7 }  
8  
9 TypedQuery<Person> query = em.createQuery("select p from Person p where " + hql);  
10  
11 if(parameters.contains("name")){  
12   query.setParameter("name", values[0]);  
13 }  
14 if(parameters.contains("age")){  
15   query.setParameter("age", Integer.parseInt(values[1]));  
16 }
```

# FinTech



# Digital Media



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