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Legal and economic aspects of publishing school books in Germany – with a case study of the bavarian licencing procedure

The market of educational books is characterized by the educational policy of the German states, by the authorities' financing, by the public opinion regarding education and by workings of book trade. These areas are subject to enormous changes at the moment. The German market of education is extremely splitted because of different plans by the Federal states. These have a great influence on the book production due to the licencing procedure for school books. The educational policy is responding with new projects to the bad results of German students in different international comparisons like the Pisa study. More and more these educational reforms have their effects on daily life in schools and as a result also on learning aids.

Free learning aids with school books being financed by the authorities, gets called into question more and more and is already abolished in some cases. There are tests in process how to finance the school books, for example to rent the books for a certain fee. Also the public interest on education and educational policy has grown.

In the book trade there is taking place a growing process of concentration regarding school books. That is a reaction to changing conditions. On the one hand are required new school books due to changed contents, for example caused by the introduction of the 8 year lasting Gymnasium and foreign language lessons in elementary schools, on the other hand the money from the public purse are getting cut and free learning aids are getting reduced or even abolished.

In the meantime the three biggest German publisher of educational books Klett, Cornelsen and Westermann share 90% of the market, while the remaining 10% are splitted on approximately 70 smaller publishing houses. Smaller firms are able to remain competitive in one or more niches because of the strong segmentation of the relevant market what means different guidelines by the German states and different types of school. Another reaction is the growing importance of new markets for school book publishers. Especially the areas of children`s and youth literature or adult education are markets of the future and are getting more and more important.

Changes in book trade are caused by new licencing procedures for public orders and by the abolition or reduction of free learning aids. These have effects on structures of both suppliers and customers.

This report offers a summary on all areas of school books market. The most important publishers of school books and a selected figure of independent publishers get described and compared. In an other important part are examined the bascis of book trade. The role of the educational policy and of the German states concerning school books trade is shown with the help of a case study of the bavarian licencing procedure.