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Berlin Specialised Publishers from 1989 to 2004

During the past 15 years, Berlin has become the German city with the most publishing houses and most publications. It is especially well known for its scientific publishers. But other non-fiction publishers are also located in the German capital. This thesis deals with all Berlin-based companies which produce specialised books and media including publishings in STM, the laws, business, trade and the humanities. These companies are called specialised publishers in the following. The thesis covers the development of the Berlin specialised publishers between 1989 and 2004 and a status quo of those publishers resident in Berlin in 2004. The following questions were most important:

What has changed in the Berlin publishing environment in the given period (takeovers and fusions, foundations, closures, relocations)? What are the characteristics of the Berlin specialised publishers in 2004? What kind of program and product strategies do the publishers pursue? Which distribution channels do the publishers use?

To answer these questions, a content analysis of the German trade journals *Börsenblatt für den Deutschen Buchhandel*, *BuchMarkt* and *Buchreport* was made as well as a survey, in which 47 publishers participated. An additional source of information was the internet, especially websites of Berlin publishers.

The fundamental results of the thesis were the following:

Between 1989 and 2004 several specialised publishers moved to Berlin, many of them established branches there. The traditional Berlin publishers increased their presence in the German capital. Moreover, at least 52 publishing houses were founded during the same period. Most of the 16 East-Berlin publishers were taken over by West-German publishers and therefore lost much of their importance in case they still exist. In 2004, the majority of the 135 specialised publishers are relatively young companies. Most of them are small- or middle-class. Yet the long standing and larger publishers such as Duncker & Humblot, Springer, de Gruyter and Cornelsen dominate the publishing scenery in Berlin. 78,3 per cent of the entire production of reference books concentrates on the ten largest companies, including all the traditional Berlin publishing houses.

Up to the mid 1990s the publishing programs were extended. Later, many publishers concentrated on their thematic and corporate core competencies. Even in 2004 the majority of the publishers confined themselves to edit a few special topics – except the large publishing houses.

New media were first offered by the larger publishers as complementary goods in addition to the traditional products. Smaller publishers did the same later, whereas the newly founded companies integrated new technologies from the beginning. However, in 2004 the primary product of the Berlin specialised publishers was still the book. Besides, about a dozen of the companies also sold other media like professional journals (38,5 per cent), CD-Roms (30,4 per cent) or online publications (20,0 per cent).

Though many publishers continue to distribute their products via stationary bookshops, at least 85,9 per cent practice direct trade in some way. 74,8 per cent of the Berlin specialised publishers use the internet as a platform for end customers. Websites are run by 96,3 per cent of the publishers, and they do not only present their companies there, but also try to expand their direct sales.