

The digital transition: a view from the book publishing industry



TISP Kick-off meeting, Milan – 19 June, 2013

The publishing industry evolution

The book: perfect technology for centuries...



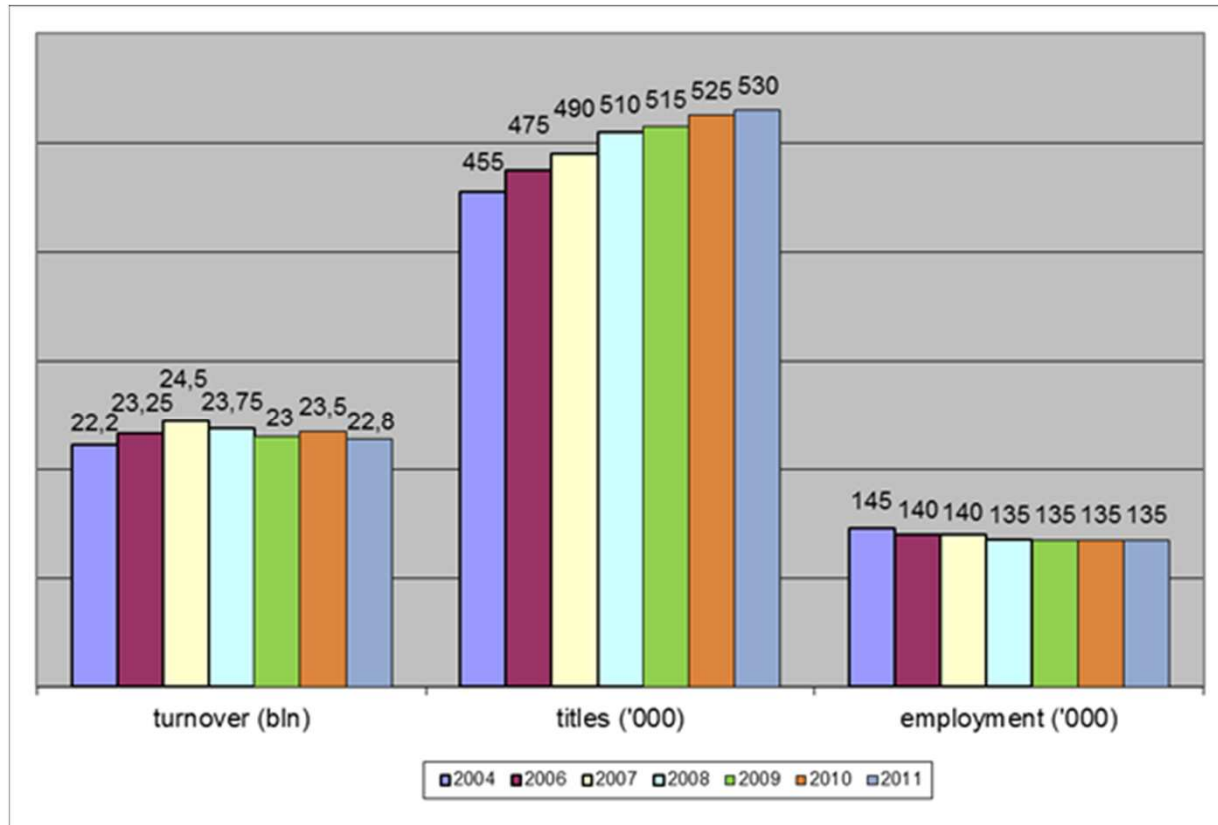
The publishing industry evolution

...and still, a lot has changed. What now?



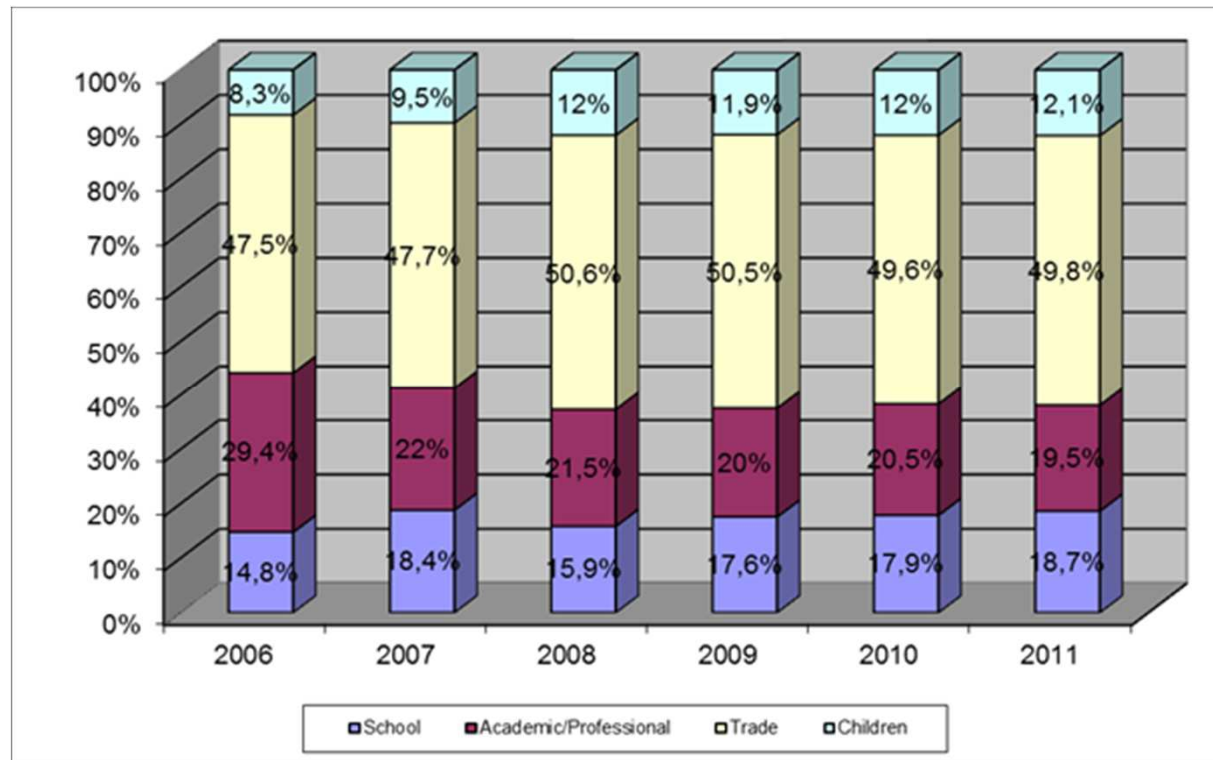
The publishing sector in Europe

- Core data



The publishing sector in Europe

- Turnover by sectors





Digital publishing

- The first e-book appeared 40 years ago but...
- The market only took off in recent years; what happened?
 - Early introduction of digital technologies in the publishing value chain but not valid for final product
 - Digital transition of the whole chain slower and not homogeneous (ex. STM vs. other sectors)
 - Technology and innovation as drivers
 - Demand as a driver

Digital publishing

- Technology trends
 - Increasing sophistication of reading devices
 - Increasing availability and sophistication of e-books
 - Increasing penetration of the internet
 - Increasing uptake of technological devices by consumers



Digital publishing

- Dynamics in the digital transition
 - Commercialisation of access models
 - Disintermediation and re-intermediation
 - Fragmentation of uses and multiplication of value chains (distribution, digitisation, search, databases...)
 - Evolution of traditional actors and emergence of new actors (search engines, technology providers, internet service providers, pure internet players...)

Digital publishing

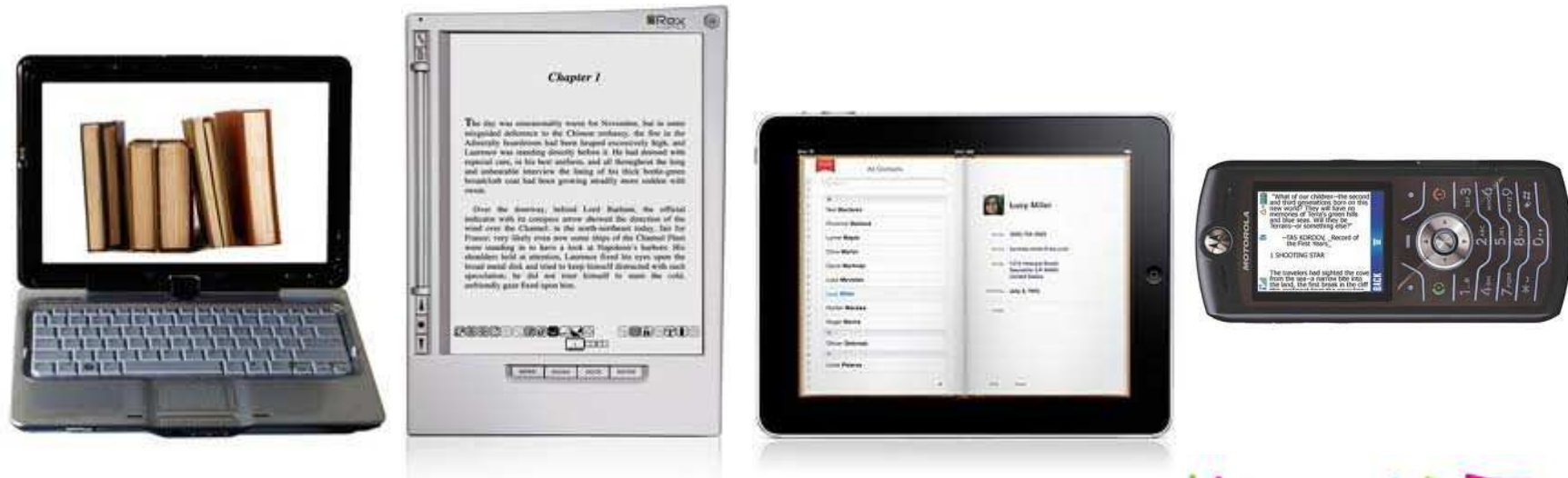
- The digital book value chain: actors and roles
 - Content creation: writing, publishing
 - Digital content creation: digitisation, conversion (ex. ePub)
 - Archiving of files and addition of metadata for description and indexation
 - Online aggregation/distribution of e-books according to different business models, connected to specific reading solutions
 - Sale, loan or rental of digital books
 - Provision of DRM systems
 - Production of reading software/devices

Technology in publishing

Authoring	Editorial	Production	Printing	Marketing	Distribution
Word Email	Word Virtual editing E-platforms and cooperative work tools Email Online iconographic archives Search engines	DTP XML Content management systems Digital archive mgmt ftp OCR Digitisation Ebooks Multimedia elements mgmt	Digital printing POD Professional printing Self- publishing	Websites Social media Blog Email Widget Search engine optimisation Podcast	Online bookstores Content aggregators Digital archive distribution Digital libraries Data mgmt and mining

Opportunities

- A whole new world of reading patterns
 - Readers access books on a number of devices: PCs, e-readers, tablets, mobile phones...



- And in a number of formats

Opportunities

- A whole new world
 - New (e-)services become available...
 - Digital bookstores, digital bookshelves, digital libraries
 - Permanent purchase of single e-books (or chapters)
 - Rental of single e-books
 - Subscription to online consultation of single works or collections
 - Full text search of books on a platform

...at a click



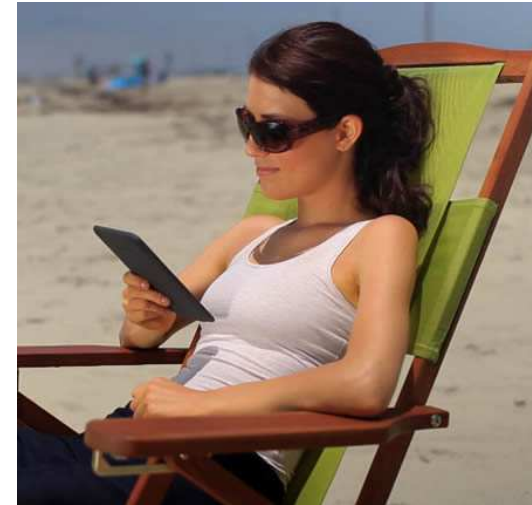
The stakes for publishers

- Meeting the needs of users
 - Enhanced accessibility
 - Font size, text-to-speech, audible menus...
 - Embedded dictionaries
 - Lighter school bags
 - Reaching out to the digital natives



The stakes for publishers

- Meeting the needs of users
 - Access anytime, anywhere
 - Enhanced content
 - Music, video, notes...
 - Interactive content
 - Textbooks, exercises, travel guides, cooking books...
- Lower prices



The sky is the limit...

A view of the industry

- Production and costs
 - Savings?
- An infant market
 - Small but fast...
- New opportunities
 - Self-publishing, PoD, etc.



Challenges

- Viability of business models
- Piracy
- VAT
- Technology lock-ups
- Concentration in retail market
- Digital rights
- Accessibility



The role of technology

- Standards and interoperability
- eCommerce and e-book distribution
- E-book formats, reading software and devices
- Accessibility all along the value chain
- DRM
- Interactivity, enhanced content
- User interfaces
- And much more...

Thank you

FURTHER INFORMATION

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Any questions?

