



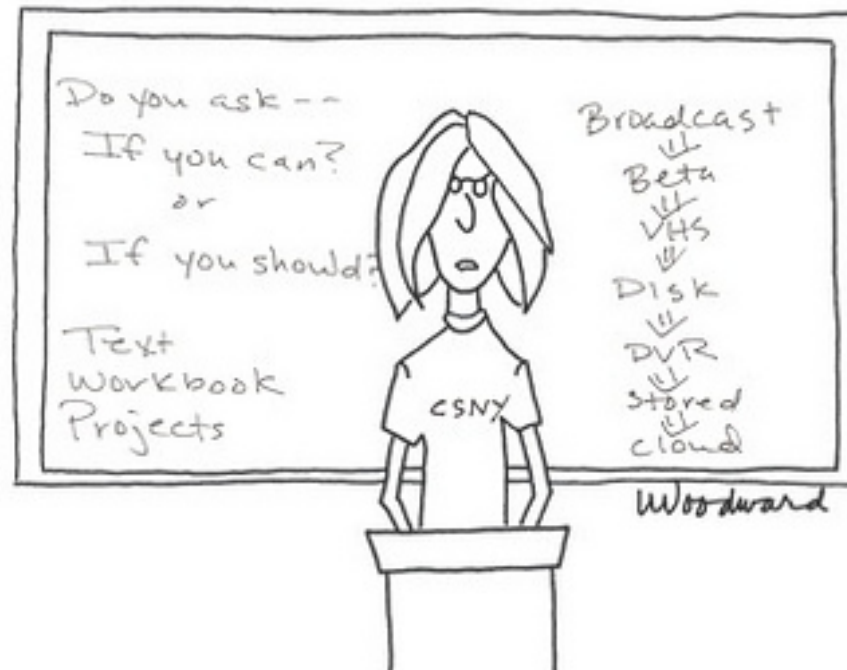
# The Future of Publishing: Evolution or Revolution?

**IXXUS Meeting**

**Introduction by David R Worlock**

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*"Chad, when I told you to deliver a paper on outmoded technologies,  
I didn't mean for you to throw a New York Times on my lawn."*

# What did “Publisher” REALLY mean?

- Broadcaster
- Format directed
- Mixed revenue streams
- Create in print, re-version elsewhere
- Brand developer
- Generaliser of content, seeking widest audience possible
- Understanding the advertizer

# And “Information Services and Solutions”?

- Born digital
- Neutral in storage to potential end uses
- Narrowcast, channel – driven
- Personalized, customized
- Understand the workflow
- Collaborative
- Revenue from licence and contract
- Always seeking stickiness
- Smaller, but better margins

# Revolution at every turn....



- Big Data – taking the analytics to the content – Lexis Risk Management as a case study
- Open Data – even government is getting involved (at last, and very slowly!)
- Start-up economy is vibrant – 800 Shoreditch start-ups looking for a niche. The Mendeley case study
- Major advances in analytics, extraction and data-mining

# Evolution on every straight stretch...

- Progressive standards development around mark-up and XML
- The emergence and adoption of standards around semantic discovery/Linked data
- Devices emerge to become effective delivery tools – from the Newton to the iPad
- Mobile grows slowly into the major content market
- We have the bandwidth (coming soon to a street near yours – in 4G)

# Welcome to the Networked Society



- Profound changes in relationships
- Community is easy to externalize and express
- Collaboration is a key outcome
- Learning is a feature of collaboration
- Real and virtual world relationships cease to work in parallel
- Disintermediation and Reintermediation

# The Attention Economy



- Attention is the scarcest commodity in the network
- Obtaining and exploiting user attention is thus the highest value
- Attention can be natural, but usually it has to be fought for, using social media marketing
- No brand or culture is so resilient that it does not need to be positioned to catch attention



# Ready for Change?



- XML?
- Metadata – can you add value beyond current expectations?
- Tools and analysis – Grow your own?
- Collaboration – ready to do deals, even when it hurts?
- ABOVE ALL – do you really understand how users behave and what they need (not what they tell you they need!)

# False Dawns: A warning!

## The eBook Effect



- Just a wrapper
- ePub3 now approaching the functionality of multimedia CD-ROM
- Needs to read vertically for a Chinese market
- Exposes the verticality of book markets – will dominate fiction – 90% in two years (Hockings, Locke) and change the nature of childrens, but adult non-fiction? Narrative is the answer

# Do we know what we are selling?

Increasing  
Market  
pressures on  
cost, quality  
and pricing



## PRODUCTIVITY

- Did we save time?
- Or people?
- Or resources?

## DECISION-MAKING

- Did we know what we should know?
- Needed to know?
- What we didn't know was available to know?

## COMPLIANCE

- Did we observe our own standards and practices?
- Our industry/self-regulatory rules?
- Legally enforceable standards and regulations?
- More cost-effectively than before?



Enhanced  
Competitive  
Positioning

# Where is the Technology going?



- Nano – but what does smaller mean?
- Machine to Machine – but what are the implications?
- Linked Data - but how can we exploit the ability to associate disparate data entities?
- Semantic discovery – but can we make ontologies work together?

# No one imagines, Everyone expects...

- Storage will never run out – the Cloud
- Access devices will adapt to mobility
- All functionality will always be in place
- Common needs will be resolved into Apps
- Workflows like learning will induce greater productivity, better decision-making, measurable compliance

# A Post-Modern Manifesto for Publishing

- There will be a diminishing emphasis on content, its ownership and proprietary nature
- The asset will become the understanding of customer needs, and turning that into trust and authority by virtue of satisfying those needs with solutions that satisfied my mantra: productivity gain, decision-making enhancement, and compliance management
- The business model will change in line with this, and settle around service contracts and content rental
- Users will stop being readers and start being participants in workflow and process
- And in order to make this happen, those who had formerly fought to the death about content ownership will cross licence content to each others' solutions, co-market solutions around shared content, enter into lifetime rental arrangements with users and generally behave in an almost exactly opposite manner to the way they have generally behaved for the last 40 years.

# Is this a trend or a torrent?

Business Information: Analytics and Platforms in High Demand Analytics and platforms are becoming key differentiators in business information services. We are now 75 days into 2012 and BIIA has tracked 70 announcements of acquisitions, new product introductions, partnerships, international expansion and new company launches. 23% of announcements involved analytics, decisioning systems and fraud prevention services, 20% involved b2b data and 13% for platforms/workflow tools.

**Monitored by the BIIA – Business Information Industry Association of Asia Pacific**

# Thanks for listening!



Contact David Worlock at  
[david@davidworlock.com](mailto:david@davidworlock.com)

Tel: 07836 361873

On Twitter at [dworlock](#)

And come to [www.davidworlock.com](http://www.davidworlock.com)