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A podcast series on the business of writing and publishing

Leading Innovation

A conversation with leading analysts

Recorded at the [2011 SIIA NetGain Conference](#), Boston

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KENNEALLY: Welcome to our fair city. My colleagues and I at Boston-based Copyright Clearance Center are very happy to have you join us here. I say it's my fair city. I'm sorry. The weather isn't quite fair, but if you wanted to go somewhere for great weather, you could go almost anywhere else, OK? But if you want great history and a great history of innovation, this area, this city is a tremendous place to be. It's an inspiration, I think, for the kind of work you're all doing, and as Ed mentioned, I in my past life committed the sin of a couple of books in the history of this area. And I'll just point out to you two things that I think are relevant.

First of all, the first telephone call was placed from Bell to Watson just about four blocks away, at the site of what is now City Hall here in this city. And just across the river at a company you might have heard of – Bolt, Beranek and Newman – they pretty much developed what is known today as the Internet, and it was 40 years ago in 1971 that Ray Tomlinson sent the first e-mail. Now, the first telephone call, of course, was come here, Watson, I want you. The first e-mail – does anybody know what the first e-mail was?

M: (inaudible) (laughter).

KENNEALLY: I tell this story to a group of Japanese students every once in a while. I'd come in for a media class and I tell them – I write on the board Q-W-E-R-T-Y-I-O-U-P. Right. Just the first row of the keyboard. What I love about that though, is they all sit there and they've got these little pocket translators and they think it's a word. (laughter) And they get to about Y and they go oh, OK!



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What I like about that first e-mail is the notion that it's really just gibberish. That in the digital age, content is just all those bit and bytes pulled together. It's up to us to make some sense of it. OK? So with that history lesson as a way to get us started, I want to introduce our panel. We have, to my left, Ned May, Vice President and Lead Analyst for Outsell, Inc. Ned – welcome.

MAY: Thank you, Chris.

KENNEALLY: To his left, Vanessa DiMauro, CEO of Leader Networks. Vanessa – nice to see you.

DiMAURO: Thank you.

KENNEALLY: And we have finally, at the end, Jim Hamilton, who is Group Director of InfoTrends, specializing in production, printing and media consulting services. Jim, welcome.

And they're all here because another thing that Boston is known for is its community of analysts. There are a lot of very smart people here following a lot of important things, and we're lucky to have them. They've all just pretty much walked here. In fact, Ned, you could almost walk here. And when you follow the business, you're particularly interested in these days in mobile devices and how they are shaping the workplace and how they're shaping content delivery.

What's the grade you'd give right now the information industry as far as how it's serving the knowledge worker?

MAY: Oh, that's a question. A B-minus. Is that the end of my test here? First, before I begin, I'd like to add my own history lesson, which is I did just live very recently in the North End, which is where Paul Revere's house is, and if you look at that house, it's remarkable how similar it looks to houses today. So hundreds of years later, we're still in structures that look very similar, and I think that's important because we all feel that we may be entering a new phase in the information industry, but it's likely when we look back, a lot of these structures will be the same. So, we have new devices. We have tablets, we have iPhones, we have e-readers that are just on top of a 10-year prior change of going to the web. So there's a lot of new opportunity to serve clients there – or meters there, but I think we're focused so much on those devices – we're focused so much on creating this new experience that we forget some of the old experiences.

So how to bring this all back together in two seconds or less. We have seen a lot of attention around applications and building applications for delivering content. We are starting to monitor data around that and something that we see is what we call



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apathy, which is initial downloading of apps is quite high. You go back to the individuals. You ask them OK, how many of these are using today – that drops off precipitously. And then we ask how many are you going to buy in the future, and that is low as well. So, there's some challenges around this, but we're seeing perhaps an overemphasis on delivering content through an application. It's a bit of a holy grail in delivering that way because everyone wants to own the end customer. Everyone wants to be THE experience that the reader turns to, but only few can.

KENNEALLY: You mean excessive enthusiasm might have crept into all of this?

MAY: Yes.

KENNEALLY: That's a surprise. That's never happened before when it comes to digital technology, right?

MAY: Right.

KENNEALLY: Well, in fact, there was an excessive enthusiasm only a year ago. It's only been a year the iPad was released for sale, and there were articles almost immediately won and wired (sp?) declaring the web dead. So I guess what I hear you saying is web's – the reports of its death are exaggerated.

MAY: We're seeing that. Now, it's also important to remember one year out – so very early days in the tablet market, but a year ago, the tablet was this great opportunity to save – to recreate the container for print content that had been broken and fractured on the web. Now we're seeing it's a cost of doing business. Publishers increasingly are going to have to deliver their content in digital form that's readable on these devices to their existing print subscribers. It's also very early days in the tablet market too – so it's been driven and defined by Apple day. That's about to change.

KENNEALLY: Right. And you know, I think what your research is showing us is that it's increasingly important as the tablets are becoming, it's only creating more complication for content creators because if somebody's got a smart phone or a tablet but – they've also got two or three other devices in their pocket.

MAY: Right. We just completed a survey of about 1,800 knowledge workers and students and asked them what devices do you own, and it was very clear that it's multiple devices in their pocket. 63% of them owned a smart phone, 11% owned a tablet, 18% owned a e-reader, but then if you overlaid those circles, you saw that nearly half of the iPad owners also owned an e-reader – that very few iPad owners didn't own some other device. So when you're serving content to them, you need



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to recognize you don't know what that individual is using at that moment (multiple conversations; inaudible) access –

KENNEALLY: And the individual who has the iPad – your research has revealed something about him or her I think quite interesting. Where do they work? In the corner?

MAY: Oh, yes. Thank you. (inaudible) I have –

KENNEALLY: He dropped his –

MAY: – dates (sp?) of data. Yes. I think that's a very important point in framing this – how we're looking at the opportunity – we segmented ownership of iPads by job level within the enterprise and clearly, senior executives out number individual contributors in that enterprise in their ownership or intended ownership of iPads two to one. So nearly half of the senior executives have an iPad less than 10% of individual contributors have, and I think it's around 8%, and those are enterprise workers – so we stripped out kind of the general population.

When we look at application downloads and who's paying for applications, senior executives are paying for apps twice as often as anyone and the average buyer of an app is on those devices. So it's creating this momentum in the marketplace, or at least in the coverage of it that perhaps is not there – has not caught up. So a lot of effort in development there – it's not clear there's a lot of market down underneath it.

KENNEALLY: Right. And the challenge then is when again, if we look back a year ago and we heard about all the media companies going to create iPad apps, it was going to be about revenue generation. (inaudible) we're not seeing the adoption that would be necessary for that, and even if we remember the numbers – but I think it's 15 million iPads are out there – that's a good number if you're Steve Jobs, but that's still not a great number if you're in the advertising world or other places – So if it's not about revenue generation, we still need to create these apps. We have to be where the customer is. What's it going to be about?

MAY: Unfortunately, many times it's the cost of doing business. So we're seeing some of the leading publications having developed an iPad app and then putting a wrapper on their print publication and saying, please go and download the app and you can now get your content in both forms, but they're not looking to make incremental revenue. They're just looking to hold on to their core customers.

Part of that is we're seeing the new aggregators that were just mentioned. The new iPad aggregation tools are fantastic – Zites and Flipboard – great ways to bring



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content in, curated basically by your own interests and activities on the web. It's going to be tough or near impossible for any one publisher to compete with that model.

KENNEALLY: And the irony there is – perhaps both a danger and an opportunity – is that things like Flipboard – even Zites, which has attracted the attention of some serious publishers who want it to cut it out right now – it's for the iPad. It's a way to bring some of those features of the web back into the tablet.

MAY: Right. And a lot of that. So there's a big question around development – is it an application or a browser, too. Another question we asked our respondents – how are you accessing content today on these devices. It was, for the enterprise worker, two to one – they're using a browser-based experience versus an application-based experience on the mobile device. So in that sense, the web is not dead.

KENNEALLY: Right. And we could talk about a lot of different things, but I want to just mention one thing and get your reaction to it. As much as we focus on connection – and we definitely live in a connected world, now that we're all so digital – what about non-connected moments? Are you able to get a sense of how knowledge workers and others feel about when they're not connected?

MAY: Not connected with these device – who's not connected?

KENNEALLY: But isn't there a value sometimes in not being always on?

MAY: Yes. I mean clearly, in being off and thinking – a clear value in that. I don't know if you're touching on to the cloud and some of the challenges –

KENNEALLY: Exactly.

MAY: – with that.

KENNEALLY: Because I think there's going to be – again, if we're talking the way enthusiasm comes into the marketplace, there's an enthusiasm around the cloud as this great solution, but that only works if we're always connected.

MAY: Right. The challenge with that is I don't think users care about the cloud. There's a group that does – it's a wonderful way to solve a problem. It's embraced by IT departments. It's a great way to reassert control, but from our research – when we asked them about this, they just don't even know how to respond. They just know what they want when they want it and they expect increasingly to have that. So the cloud creates problems with that – with delivering content. If they're reading a book and the subway goes underground or the T, they want to continue to



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be able to flip the page. And those are their concerns. So we are seeing attention around the cloud. It's perhaps an important concept but tough to gauge end user and reader.

KENNEALLY: Well, but that is a warning Ned made from Outsell. Thank you. And I want to continue to do my old job of journalism, which is about connecting dots, and turn to Vanessa DiMauro, CEO of Leader Networks. And Vanessa, what you are connecting is this adoption of the mobile device and the way that it's changing work in the workplace and the way that businesses interact with their customers. Tell us about that. That's another – that's a long-winded way of saying we have this thing out there called social media now.

DiMAURO: Yeah. You talked a little bit earlier about the need to really look at old processes, and a lot of what worked in some cases in the past – we'll currently use the example of the house – the Paul Revere house – and I think this is often true when we start to think about social media, social business and the use of a lot of these tools. In many ways, this is very much back to the applectart, where 200 hundred years ago someone went through a village, asked people what they wanted to buy, showed them what they had and chances are if they didn't have something that was necessary, when they came back again next month, they would have it.

And this is what's starting to reemerge as a corps value for the success of the connected enterprise, be it using the mobile device or using a different set of corps interactive processes in the enterprise. It's really serving your customers where they live. Your customers, your partners – whoever's in your business ecosystem – in a way that meets their needs, and if you have corps businesses who need mobile applications, that's where your customers is, and to interact with them on their devices and allow that multiplication to occur.

KENNEALLY: Well, your work, your research is about alignment of the capacity to reach the customer with the strategy that the business has, and your criticism of some businesses is too much tactics, not enough strategy.

DiMAURO: Yeah.

KENNEALLY: Help them out. How do you get to that strategy? What are some key elements you think we should have?

DiMAURO: Well, we're very focused right now on social media and marketing, and it's very important because we're able to – it's endeavor tactics that show results – so, if I do this, this happens. There's a binary connection. And that's just one face of the social enterprise, and really, for social business or network to enterprise is to see results, and by results I mean financial returns, customer retention, really how – real

corps business processes to fall out of it. A lot of the social initiatives need to be threaded throughout the organization – from operations, marketing, sales – throughout the whole enterprise value chain. And even if you think about Porter’s value chain, there are ways that social media can be adapted.

But instead of focusing in many ways on the social media tactics, the strategic part is very important, and really understanding what the corps business values are and what the business objectives are and look at ways for social to augment or accelerate a business process that couldn’t be there otherwise. For example, if an organization is taking too long or spending too much money on new product development – even five, seven years ago, if you think about a typical product development cycle, product development and research would go identify different – new product innovations or ideas. They do corps research and then they’d launch it and hope for the best.

And now we’re in a whole different environment, one where you can co-create with customers, accelerate that process, see cost reductions and chances are, you’re going to get a lot more right if you co-create with your customers. And that’s one example of how social business or working with your collaborative processes can really show impact across the organization.

KENNEALLY: And it’s a fundamental shift in thinking. It’s all bidirectional. It’s not one way. I guess that’s an obvious point –

DiMAURO: Yeah.

KENNEALLY: – at this stage of the game, but there are companies that are really putting this into practice today. This isn’t theory. So Starbuck’s, for example. We’re always talking about Starbuck’s. We either going there or talking about going there, but they have something called My Ideas, you told me.

DiMAURO: Oh, yes. Actually, I wish I had my bag with me because I’m carrying around this little green stick that’s about this big because I got on at Starbuck’s a couple of weeks ago, and my – and I’ll tell you why. Starbuck’s created a website called My Ideas. And this is one example of customer co-creation. So they launched this website because in many ways when we think about Starbuck’s drinkers, customers – they’re really representative of the tribe. Many have brand identity and an affiliation with Starbuck’s, and – so they feel like their customers have an impassioned connection to their organization.

So they created a website called My Starbuck’s Ideas, and they invited customers to come in and give ideas and just post different ideas and processes and just recommendations they had. And in the span of eight months, they were able to



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gather over 1,000 new product ideas and they've already implemented 100 of them. And the reason why I'm carrying around a little green stick is one of the best and most cost-reductive ideas that came from a customer was this gentleman who was fed up with having the coffee spill on his hand while he was driving.

And so he asked for a thing that goes in the hole, so that when he walked to his car, whatever, the coffee wouldn't spill out of the top. And so Starbucks, for pennies on the dollar, were able to create this product. It has saved them a considerable amount of money in litigations and unhappy customers because of the burns and things like that, and it pleased many customers. So that was one example of a cost-reductive idea. But My Starbucks has also generated some revenue-generating ideas from this site as well.

KENNEALLY: And it's the kind of small thing that when you're sitting back at the headquarters you're not going to think of that because –

DiMAURO: Right.

KENNEALLY: – you're looking at larger issues. This is pretty interesting. The other piece of social is, of course, community. And again, we hear a lot about that, but in your research, you have a great example of a publishing site that has really gone beyond what it once was, and this is Martindale-Hubbell –

DiMAURO: Yes.

KENNEALLY: – which people have mentioned – the legal industry or legal profession earlier, and I remember that as just being this enormous wall of directories for every lawyer in the country. It's far more than that today, and what have they done to really create a successful community and change their business in the process.

DiMAURO: That's right, Chris. Just to back up to explain the context of this – and disclosure to one of my clients, but we talked earlier about excessive exuberance, and I think in many ways we're seeing a lot of this with social media. Everyone thinks it's a great idea. There's just – do it and wonderful things will happen. And I'm a data (inaudible) and I'm a researcher, so this is a little frustrating for me. So about six months ago, I started documenting and crafting some ROI case studies of online communities – B2B online communities that are showing returns. Some are my customers, some are not, but it didn't matter. The point was someone – these data needed to be captured and the returns organized in a fashion that both could be repeatable processes and well understood.

And one of the best case studies and one of the best examples of returns was Martindale-Hubbell – Lexis-Nexis Martindale-Hubbell Connected. And that's an



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online community that my company worked with them on the strategy, but they've taken it far beyond and it's been running successfully for many years. And this is an online community that was dedicated to bringing the legal profession together.

Martindale-Hubbell, about six years ago or so, realized they had a transformation opportunity, so – they publish those print directories, the books that sit behind the lawyers. There are many publishers in this room, so you know what they do. And they realized that people weren't going like this anymore to reach for the directory. They were going online. So they started putting the information that was in the books on the shelf online in static, little nuances. Lawyers could list themselves.

But that wasn't really enough. We were moving into a more social world. So Martindale-Hubbell just really understood that they needed to figure out a way to bring together the lawyers into a more collaborative environment. So they looked at what that ecosystem looked like – and there's a HBR study called Two-Sided Markets. It's from 1990, I think, 2 – and it's phenomenal. It stills applies this day, and one of the corps components of that theory is that you need two markets to come together. And collaborative enterprises is both parts of the equation win. And in Martindale-Hubbell's case, they serve corporate counsel and private practice attorneys and that's an ecosystem they needed to bring together.

So an online community was created called Martindale-Hubbell Connected. It was to be a Linked-In for lawyers of sorts – and so that that ecosystem knowledge share could proliferate. And of course, by they way, they're going to sell products and services and offer ways for their partners to engage. And it's now about 65,000 attorneys large, and it's a self-standing business unit that's revenue-generating and has really enabled Martin-Hubbell Connected to emerge as a thought leader and grow and proliferate coming out of the print media business. They've retained that part of the business that's still very important, but they've created two-way conversations around the content that they put on statically in the past.

KENNEALLY: And your point, finally, Vanessa, about data because an important one, you have a great phrase – the social muddle. What is the social muddle and how can people in this room stay away from it?

DiMAURO: Right. As we talked a little bit earlier about the corps processes and front-end marketing initiatives in social media or social business need to tie into the organizational corps processes for it to be valuable. One of the things that's happening is currently, as this is a new industry, is we're all latching on in many ways to the social media marketing activities. So many organizations have a Twitter stream, they have a Facebook account, they're out there broadcasting and doing whatever they need to do aligned with their business strategy or maybe not so, but they often don't connect the information back into the organization in usable



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ways. So it is very uncommon, although it is best practice, for customer service, for example, to mind the Facebook data or the Twitter stream in order to look for customer innovations or opportunities to bring back – data back to product marketing or informed sales and so on and so forth.

Great stuff is happening out front but it's not being brought back into the organization in meaningful and programmatic ways, and that's where the muddle's starting to – it occurs. But time and more strategic focus will help clear some of that up.

KENNEALLY: All right. Well, thank you, Vanessa DiMauro. And I'm going to turn finally to Jim Hamilton from InfoTrends. And Jim, I want to stick with this notion of Paul Revere house that Ned contributed to the discussion. I like it a lot. And the way that houses change – sometimes we build an addition, sometimes somebody gets married or a child is born, and so it's the same house but the people living in it are different or the way it's being used is different. The printing industry is probably like that house today, right? We've got two partners and their roles are changing. There's the digital side of the business – the physical – and the physical side of the business. Talk about that relationship. Where is it at today and where's it going.

HAMILTON: You know, I'd really divide it up more into three sides, not that there's one and two, but one, two and three because you've got the traditional, long-run, print lots of copies at the lowest per piece cost, warehouse them when necessary, sell them through a brick and mortar kind of environment. Then you've got a digital print side, so still physical, still print that allows you to print books on demand as their ordered, so no physical warehousing – thinking of that digital printer device as a virtual warehouse. And that idea has caught on with publishers. You think 10 years back, people were saying aw, print-on-demand, warehouses, that kind of stuff – forget about it.

But then you've also got the full electronic delivery side of it, and I honestly think that from a print-on-demand perspective and an e-book perspective, the success of the two of them really has helped both sides. Having that digital data warehouse, where you've got the electronic content, such that you can go to e-delivery if you need to or go to a print book output if you want to, has really helped both areas.

And the other point that I'd like to make is that some people, I think, have a concept of digital print that's fairly static. They think of it really as oh, it's good for short run and quick turn around work, but it's kind of limited there. And to some extent, historically, that's been true of some of the devices that have been in production sites, but we've got a new era of high-speed production, including color inkjet devices – very high speed, from companies like Océ and HP and Infoprint



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Solutions – that are bringing digital print into areas that it never has been before. So my expectation is that we'll see it more in terms of magazine work, custom publications, catalogues in particular – maybe even a little bit in newspaper work. We'll see how that all plays out because it depends so much on the electronic side of the house and what happens there.

KENNEALLY: Right. And we could put out – if anybody wanted to take a field trip, they could go to Cambridge to the Harvard Book Store, where there's an espresso machine, which – it's interesting. The man who bought the Harvard Book Store had worked with Ray Tomlinson at Bolt, Beranek and Newman. He's an engineer. So the idea of an engineer buying a book store that still sells books – not just cups of coffee, but books as well – is a fascinating one. But what he contributed to the whole idea of what a bookstore is becoming is getting that espresso machine – bringing it in there and now they are serving that Harvard Community in a way that they never anticipated before. It's a really important piece of their business and it's made possible by this technology that you're talking about.

You developed some interesting testimony for Congress recently regarding the Government Printing Office, and we don't usually think of the government as being very cutting-edge about anything, let alone about how it delivers information, but the GPO has a very important function, which is making sure that the citizens are informed. And up to now, its information has been printed. And you looked at the challenges ahead. There were some lessons you drew for that, but I think they're applicable to the room here and to be on. Can you talk about it?

HAMILTON: Oh, definitely – across the board. In the kind of economic times we're in right now, there is significant pressure by Congress on GPO – the Government Printing Office – to reduce their overall costs, and they look at it and they think these guys are just printing and they're doing all this kind of on-paper work and printing too many copies and it's wasteful and they shouldn't be printing in color and all that.

KENNEALLY: Can I say every time there's a budget or some report after a lengthy investigation, what's the obligatory shot on the TV news? The stack of volumes with 1,000 pages each, right.

HAMILTON: Right, right, right. And you think again – to get back to your point about these senior folks having these kinds of (inaudible) computers or whatever – if you wanted to deliver the Congressional Record in a fully electronic format for that audience, you'd be all set. But the problem is there are rural libraries and there are people who don't have access to these kinds of devices, and certainly the role of the GPO – which I think should be the Government Publishing Office, honestly, instead of Government Printing Office – and they've done a lot around delivering



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electronic format. They developed methods of getting digital information out for the Congressional Record for other kinds of publications, but really, their challenges have a lot to do with when do you decide to bring run lengths down to a certain point or to go fully electronic or to have some sort of combination of the two. Their mission is to protect, preserve, archive up to 100 years. And what the expert actually from the Library of Congress who spoke at the same time that I testified said was that there are only two methods that they found to preserve it for that length of time and it's paper and microfilm.

KENNEALLY: Wow. So we heard from Ned that the web may not be dead. The book isn't dead, either, then.

HAMILTON: I don't think so. I look at the ability to have a physical piece that will be around for a long time, that you can easily write on, that you can flip back and forth pages – all those kinds of things. Now, I'm sure we got a lot of print advocates in the room and the next generation of folks may not have that same kind of feel, and yet there's certainly plenty of times when you want to have that physical piece. I think we'll see more color printing. I think we will see means of preserving people's memories that may just exist on Facebook, for example, because those memories, those photos are photo merchandise. A huge part of the print-on-demand world that's wronged because of digital cameras, photo output and certainly the social media, and those things tie together because in 20 years from now, I think a lot of those mobile workers or mobile consumers are going to be wondering where those first-step baby pictures were or all of those kinds of things. Will they be able to reach back into some cloud digital archive and pull those out? Well, a printed piece is going to make a difference then.

KENNEALLY: Right. And you can see how the individual might be – again, as Ned was saying, sort of not so sure about his or her relationship with the cloud. Talk briefly about that new buzz word, if you would, Jim, as far as it applies to the publishing world, and trusting the cloud seems to you to be probably a dangerous idea?

HAMILTON: We have a group within InfoTrends that looks specifically around digital photography, and what they've said in regards to the cloud is if you want to save your photos, you've got to have a redundant kind of approach. You can have your photos on the cloud – that's fine, but if where you're storing them goes out of business, you're out of luck. You may want to have a hard drive. You may want to have printed output, but it's that redundancy argument when it comes back to cloud. Sure, there are going to be a lot of great services, but how much do you trust that one service provider for that?



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The government can't afford to trust anybody that those digital documents will be around in 100 years. They have to make sure that that happens. That's the GPO's mode. Now, if I have a self-published book that's on Lulu.com and Lulu goes out of business, well, OK, I'm lost but hopefully, I will have CDs someplace with those original files, so that I could recreate it. It's going to be that kind of world, and I think that redundancy is the answer to the question right now and will be for a while.

KENNEALLY: Right. The point we're at today is we still have feet in both camps, and we have to be very mindful of that but we're never actually going to leave one and be fully in the other, at least not for some time to come. I want to give us all five minutes to see whether you have questions from the room. I was going to bring up a hand-held, which I think is back on the table there and I can go grab that. Oh, someone's back there. OK. So I don't know if there are any questions. If people would like to quiz our panel as well. I see Ed, I see John. We'll start with Ed, since he introduced me so nicely.

ED: Thanks for the opportunity, Chris, and good set to the panel. Jim, I was curious about your discussion on GPO because a lot of the publishers here among the SIIA are long-time digital publishers, like going back to the founding of the Information Industry Association, our predecessor group 40 years ago. So a lot of folks view the GPO as somebody who, in the past, has tried to get into our businesses and has tried to essentially compete with private enterprise. And I'm just sort of curious based on what you're talking about, do you see them as just reducing costs or do you see them as enlarging their role and really getting into the space?

HAMILTON: Well, I think because of these hearings right now, we're at a real turning point as far as that goes because they have decisions about whether to buy new printing presses or what investments to make, and certainly, the investments shouldn't be much more towards digital, and within the government, there are a number of different search mechanisms right now that are clunky and competing with each other. You've got Thomas, you've got this FD SIS. You've got a number of these different areas for finding documents and, honestly, I think some of that needs to be resolved.

The GPO is conducting a survey with its document users right now to determine what the customer needs and what the end user needs are now, and I think that's critical to the overall success in the long run of any future strategy.

KENNEALLY: John, I saw you with a hand up. Did you have a question?

JOHN: Yeah, sure. Just briefly, when you think of what folks are doing with the Alexandria Project and what have you, is there potentially a role for the public



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sector to have an archive-quality cloud that would be used primarily for public purposes, but could be used for other purposes?

HAMILTON: Boy, I don't know. I might turn that over to one of the other speakers because honestly, I look at a lot of the physical processes of getting things into print. When we start thinking of Google Book Search or some of those other areas, they help drive on-demand print, but I can't claim to be an expert on the content side. It's more when it's getting out into the physical forms. So, I would defer to someone else who might prefer to answer that.

KENNEALLY: And Ned, do you have a thought?

MAY: Well, I think you touched on it. We had a market-driven solution in Google Books, right, in their search, in their digitization of the world's repositories. Rightly, that was kept in check, but I'm not sure we're going to find the U.S. Government more willing to fund it than Google was, so maybe there's an opportunity to figure out a market, non-profit solution there that would work.

KENNEALLY: Well, there's a small university across the river that's looking into this. I think they call it the Digital Public Library of America. They've got some thoughts in mind. You might look into that because that's certainly one solution, but your point, Ned, is that with the rejection of the Google Book settlement, just recently – a month ago, plans are off for where that might wind up and some solutions – in fact, the judge said two things that I think were important. He said this is not a matter for the judiciary to determine. This is really about Congress in terms of how copyright law should address all of this, and he also said that it should be opt-in rather than opt-out and those were critical points there.

We have time for, I think, one or two more questions. Simon?

SIMON: Thanks, Chris. Just building on Ed's comments and to Jim, we got involved in the government market recently with an acquisition of Lexis-Nexis, and we certainly see increased potential for the government digitizing its holdings and making them publicly available because there will be an opportunity to build on what they have and to organize it in better ways, to make it more useful to build better interfaces, etc., etc. So I think the more digitized information there is out there that's publicly available, the more opportunity there is for us as well.

The second comment just on your comment, John – Hathi Trust. I'd recommend everybody has a look at Hathi Trust, what they're doing with books right now on the educational side. It's very interesting.



Beyond the Book

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KENNEALLY: Right. And I think that's H-A-T-H-I Trust, I believe. We have a question back here. Anyone at all? Well, I want to thank our panelists and keep us all on time. Ned May, from Outsell, Vanessa DiMauro for Leader Networks, Jim Hamilton from InfoTrends – I want to thank you all for your attention, too. My name's Chris Kenneally. Thank you.

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