Technology is transforming publishing. Are you ready for the future?
Introduction: Are You Ready for the Future of Publishing?

Driven by the Internet, technology is fundamentally transforming publishing. Digitization is disrupting business models across the publishing value chain, from content creation through development and production and on to manufacturing and distribution. Technology like blogs, print-on-demand, eReaders, social networking, and wikis are changing forever the very meaning of the word “publisher.” How are we as publishers and other businesses that care about and depend on books going to survive and thrive in a digital age?

In an article titled “Industry Transformation,” Harvard strategy guru Michael Porter writes about the importance of early and deliberate action during a time of transformation: “Because early experiments can be highly influential, companies that hope to be eventual industry leaders must think carefully about the precedents they set during this period.”

If you want to be among the firms that are asking and answering the questions that will define the future of publishing, then you need to be at the 2008 O’Reilly Tools of Change for Publishing Conference this February in New York. Internet giants like Google, Microsoft, Wikipedia, and Amazon are driving many of the changes to the publishing landscape, and all were at the inaugural TOC conference—held in the heart of Silicon Valley last June—which put industry vets like Adobe, Ingram, Thomson, Pearson, HarperCollins, and Random House in the same room as startups like booktour.com and Buzzword. (If you haven’t heard of those last two yet, you will soon.)

This report covers many of the highlights of that inaugural TOC conference (TOC is a nod to the term publishing vets will recognize as referring to the Table of Contents of a book—a deliberate choice signaling our intent to see this conference set the agenda for the future of publishing).

We’re building on the success of TOC 2007 as we put together the program for an even bigger TOC 2008, and we want you to join the conversation. You can find more information at the conference web site, www.toccon.com.

The publishing world is changing, and while it’s likely that the competitors you face today will be at TOC 2008, we’re certain that the competitors you’ll face tomorrow will be there.

See you in New York,
Andrew Savikas
General Manager, Tools of Change for Publishing
Program Chair, TOC Conference
O’Reilly Media, Inc.

1 Industry Transformation, Michael E. Porter and Jan W. Rivkin, 2000 Harvard Business School Publishing
O'Reilly TOC Conference: Tools of Change for Publishing

2400 BC. Among the earliest known “published” works are the stone tablets of Sumeria, dating back nearly 5000 years.

Going back to 668 BC., what might be called the earliest “DRM” can be found in the form of a “book curse”:

“I have transcribed upon tablets the noble products of the work of the scribe which none of the kings who had gone before me had learned… Whosoever shall carry off this tablet, or shall inscribe his name on it, side by side with mine own, may Ashur and Belit overthrow him in wrath and anger, and may they destroy his name and posterity in the land.”

—Ashurbanipal, 668 BC

It was in the 1st century that Romans invented the familiar codex form of the book, which binds together a sheaf of pages along one edge. Among the advantages of this user-friendly format:

• it’s more economical, because you can print on both sides of the paper
• it can be carried and concealed
• it’s easier to scan (indeed, a Wikipedia article on books calls the codex “searchable”)
• it can be stored with spines out, making it easier to organize a library

Though the content of books has always held value to both author and reader, before the printing press, the books themselves were quite valuable, since all were written by hand, and typically organized a library

Bringing together several pieces of existing technology in a new way, German goldsmith Johannes Gutenberg developed a wooden printing press and cast-metal movable type that work together. Around 1455, he prints his first book, a Latin bible Books, previously rendered scarce because of the laborious hand-written process needed to create them, could now be mass-produced, ushering in the first true one-to-many “mass communication” method. The mere act of publishing, particularly in its infancy, was no guarantee of quality. Ranata Rosaldo, in The Cultural Impact of the Printed Word, Comparative Studies in Society and History, writes:

“…roughly during the first century after Gutenberg’s invention, print did as much to perpetuate blatant errors as it did to spread enlightened truth…”

One hears echoes of this among many detractors of today’s burgeoning blogsphere. And no discussion of publishing would be complete without commentary on copyright, which controversy has been swirling for a long, long time.

“We respectfully submit that a greater curse cannot be inflicted on American Authors, nor a more serious injury on American Literature, than a state of Law which admits, gratuitously, the works of Foreign Authors in the same language. It is impossible that an American Writer can in any degree be enabled to make a living after publishing a book, with this law on the Statute Book, because it will be impossible for any American that is industrious enough to make a living, to publish a book without paying a farthing for the Copyrights.”

—Charles Dickens, 1842

In an eerie preview of the World Wide Web that would follow 50 years later, Vannevar Bush described a "memex" or "memory extender" in a 1945 Atlantic Monthly article. The device was designed to "instantly bring files and material on any subject to the operator’s fingertips".

Vannevar’s vision has of course become reality, with the Internet representing the most profound change to affect publishing since the printing press. O’Reilly’s Tools of Change for Publishing Conference brings together publishers, authors, technologists, executives, and others to collaborate and engage with each other on how to make sense of these changes.

Spotlight:
Manolis Kelaidis Keynote

By Tim O’Reilly

This morning’s keynote speaker at TOC (http://conferences.oreillynet.com/c/TOC/view/1275), Manolis Kelaidis (http://conferences.oreillynet.com/c/TOC/view/e_spkr/3509), received a standing ovation as he described his project to integrate digital content into physical books via circuits printed in conductive ink on the same page as the text. From the description of his session:

Books have inherent qualities that make them an irreplaceable medium, even today. They have survived unchallenged for centuries and are one of the most familiar and bestselling products we know. For a particular type of user experience they simply have not been bettered. Digital media (portable devices, touch-screens, etc.), however, has been offering seductive new possibilities to readers, especially in terms of interactivity. Can these two worlds, the digital and the physical, co-exist in a product that would offer the benefits of both? Manolis Kelaidis demonstrates his elegant ideas for next-generation books.

What’s particularly fascinating is that, consistent with our thesis that alpha geeks, who explore technology for the fun of it, are often those doing the most interesting work, Kelaidis doesn’t have a startup he’s pitching (yet—he has apparently filed a patent). He’s a lecturer at the Royal College of Art and a Fellow at Imperial College’s Tanaka Business School in London. Whether or not his project ever becomes commercially viable, it’s the kind of sideways thinking that gives the publishers audience more hope for the future than dozens of me-too ebook startups or big company offerings.

What the BlueBook teaches us, along with some of the electronics-infused craft projects that Dale Dougherty of MAKE (http://www.makazine.com) talked about in the keynote right before Kelaidis, is that we are moving towards a future in which the physical world will be infused with computing. It’s not a story about the future of the book so much as it’s a story about new ways to integrate digital and analog. It’s the other end of the same string that brought us the Nintendo Wii as an innovation in gaming. Kelaidis is asking us to think about a future when a “computer” isn’t just something with a keyboard and screen.

There’s more information at booktwo.org (http://booktwo.org/notebook/the-bluebook) from a continued on Page 4 >>

Making the Old New Again at TOC

The first annual O'Reilly Tools of Change for Publishing conference brought together a little more than 400 digital and book publishing professionals for three days of intensive and often entertaining projections about the future of publishing in the digital era—not to mention the future form of the book itself. By and large they left San José, Calif., thoroughly satisfied with the first TOC and looking forward to the next one, planned to take place next year in New York City.

After two days of tutorials and panels on technology and information, the last day of the show managed to bring the focus back to the old-fashioned printed book: With but a hip digital twist. Dale Dougherty, editor and publisher of O’Reilly’s Make magazine—a delightfully useful and graphically inventive DIY guide to making all kinds of cool stuff—said an unusual but pertinent fact during the final keynote presentations. “More horses were used in World War II than in any previous war,” he said. His point is that old technology and new technology typically coexist where you least expect it. Make magazine, Dougherty said, is about how to make old things new again.

It was the perfect introduction to the next speaker, Manolis Kelaidis, a designer, engineer, and lecturer at Britain’s Royal College of Art, and his extraordinary project bLink, an embedded electronics and conductive inks, it’s the prototype of a bound and printed book that, believe it or not, includes hyperlinks like a Web page. A reader can use a finger on the book’s paper pages like a computer’s cursor on the screen. Touch the paper hyperlink and a Bluetooth signal opens a Web page on a nearby smartphone that serves up information, music, translations or video that correspond to that link, as if the book’s paper were a paper and ink computer.

Kelaidis has turned his love of the book into a book device that thrilled an audience brought together to plan the end of the print book. The audience responded with a long and resoundingly enthusiastic standing ovation—the only one given these past three days. Yes, it’s basically a quirky (though rigorously conceived) art project, but Kelaidis made the old-fashioned book new again, using digital know-how. His book clearly touched some kind of emotional hyperlink in an audience that wasn’t as cynical about its attachment to the traditional book as the previous three days may have suggested.

The next speaker, John Ingram, chairman of the Ingram Book Group, had to hold off a bit and acknowledge his own admiration for Kelaidis (“what an act to have to follow”), before giving a brisk history of Ingram and the role of technological change in addition to announcing a deal to provide support to Microsoft’s Live Book Search in its growth.

Kelaidis’ was a difficult act for the conference itself to follow, but the day wound down with a couple of practical presentations. A panel moderated by Holtzbrinck’s director of marketing, Jeff Gomez, gave an upbeat assessment of the downloadable e-book market. There are more devices (like the Sony reader and Amazon’s forthcoming reader), better screens, more titles, and, Random’s Matt Shatz said, some reluctant big-time authors are finally getting in the game. Sales, according to everyone on the panel, continue to grow year to year, often by as much as 30%. And in a conference often focused on “free information culture,” HarperCollins’ Theresa Horner emphasized selling e-books, not giving them away or slashing the price. “If you want to give something away, go talk to marketing,” she joked. Horner cited 30% sales growth, even more impressive, she said, because “there’s no B&N for e-books, these sales are from indie e-retailers.” The biggest selling genre? Not science fiction or business, the old conventional wisdom, but narrative fiction, romance and bestsellers like 1776. SBS’s Clare Israel sounded an alarm to “get into the teen and YA market. We’ve got to get e-books on cellphones and all the other devices in the hands of teenagers.”

The most entertaining panel of the day, hands down, was Derek Powzuk’s “Rise of Authentic Media,” a very funny survey of Web sites that encourage user-generated content, an experience that can often lead to wildly hilarious results, whether intended or not. And Robert Martinengo’s presentation on reading technologies for the disabled was particularly important. The blind and visually impaired are voracious readers, and e-books can easily be converted into Braille or spoken books. Martinengo praised the work of Bookshare.org, a nonprofit online library for the blind and print disabled.

Although precise breakdowns were unavailable, TOC conference organizer Sarah Milestein said the attendees came from all over, including big groups from New York City, California, and the Midwest and southeast U.S. She expects an even bigger turnout next year in New York.
Using Web 2.0 technologies throughout the publishing process, from generating ideas to packaging information to delivering products. In this talk, Tim O'Reilly will explore some of the major trends in our Web 2.0 world and discuss the evolving role of publishers within it.

Free Culture and the Future of Publishing
Jimmy Wales, President, Wikimedia Foundation, Inc.
Jimmy Wales, a founder of Wikipedia, will provide insights into the surprisingly successful aspects of the world's largest free-content encyclopedia, share lessons that can be applied to other projects, and discuss what the future holds for free culture generally.

Valuing Content in a Web-enabled World
Jeff Patterson, CEO, Safari Books Online, LLC
Whether your primary publishing medium is paper or the Web, you have a direct stake in how your audience values your online content — and how you'll be paid to provide it to them. In this thought-provoking session, Jeff Patterson shares research conducted among IT professionals whose attitudes and behaviors are an early indicator of the preferences and behavior of the general population.

The Beauty of Print in a Digital Era
Dale Dougherty, Editor & Publisher, MAKE, O'Reilly Media, Inc.
MAKE and CRAFT magazines are fresh examples that print can provide a compelling user experience, even today. They have survived unchanged for centuries and are one of the most familiar and bestselling products we know. Can these two worlds, the digital and the physical, co-exist in a product that would offer the benefits of both? Manolis Kelaidis demonstrates his ideas for next-generation books.

Four Decades of "Tools of Change"
John Ingram, Chairman, Ingram Book Group
Since the introduction of a weekly microfiche publication that showed every subscribing bookstore their inventory in 1972, Ingram has been applying technology and aggregation to improve the supply chain for book publishers and their 128 customers. That same formula applies today, when an all-new digital distribution infrastructure is being created.

Dictionaries and Other Book-shaped Objects
Erin McKean, Oxford University Press
Dictionaries are one of the oldest information-delivery technologies still used today... but are they (and other reference books) delivering information in the ways that users want and need? How can we find out? Are your information delivery products and other book-shaped objects giving the users what they want, or just what you want them to have?

Four Questions & Answers with Tim O'Reilly
Bruce Chizen, CEO, Adobe Systems, Inc.
Tim O'Reilly, Founder and CEO, O'Reilly Media, Inc.
In this keynote, Tim O'Reilly and Adobe CEO Bruce Chizen will discuss the implications for publishers of our increasingly digital process and delivery mechanisms for all kinds of content.

bLink: Completing the Connection Between the Analog and Digital Worlds
Manolis Kelaidis, Designer, Royal College of Art
The analog and digital worlds, the digital and the physical, co-exist in a product that would offer the benefits of both? Manolis Kelaidis demonstrates his ideas for next-generation books.

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Looking Ahead: TOC 2008

We’re still hard at work putting together the program for TOC 2008, but here’s a sneak preview.

Who Will Attend? The TOC Conference is for people and organizations (big and small) that care about books across the publishing industry and beyond, at all levels of technical expertise: editors, authors, and agents; marketing and production managers; consultants and business managers; librarians, researchers, and academics; and technologists rethinking the form of the book itself.

TOC 2008 will explore:

- Projects and products that will change the way we read, write, edit, publish, and sell content
- How innovation—in technology and in business—is changing the publishing landscape
- The important forces at work that are altering the competitive landscape for businesses that care about books
- The spectrum of the “value chain,” from supply side to production to distribution and marketing
- Standards and best practices
- Rights management/contract writing for the future
- How efforts to avoid content theft are succeeding—or failing
- Truly “next generation” approaches: how teens are shaping publishing
- SEO and search, from the likes of Google, Amazon, and Yahoo!
- Opinions and ideas from the publishing consultant world
- Content: databases, remixing, user engagement, and what to do with it once you’ve got it (or permitted someone else to keep it for you)
- How do you do any of these neat things when you are in the production, marketing, and/or marketing phases
- Why and how to digitize your content/backlist, and why and how to digitize your content/backlist (or failing)
- How do you do any of these neat things when you are in the production, marketing, and/or marketing phases
- Why and how to digitize your content/backlist, and what to do with it once you’ve got it (or permitted someone else to keep it for you)
- Strategies and tactics for incorporating Print-on-Demand into a supply chain
- Tools and challenges for an efficient all-digital workflow
- Best practices for working with Amazon, Google, Ingram, and other big players
- Creative web-based marketing strategies, including SEO (search-engine optimization, a.k.a., “turning up at the top of a Google results page”) for publishers
- Best new practices and tools for working with and supporting authors during editorial, production, and/or marketing phases
- How teens and youth are consuming, and changing, publishers’ content
- How to capture and analyze web metrics of interest to publishers
- Systems and devices for displaying digital copy
- Business models for delivering and/or receiving material via new devices
- Emerging supply chain and distribution models
- Standards for metadata and for access
- Innovative DRM models
- New copyright clearing, assertion, and determination mechanisms
- How do you do any of these neat things when you don’t have or can’t afford technical staff in-house?

Visit www.toccon.com for more details and to register for the Conference. Save 35% when you register using discount code toc08ing.

Recap: The 2007 TOC Conference

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Taming the (WWW) Wild Wiki West: Harnessing the Power of Wikis and Social Collaboration for Publishers
Ashereth Brilla, Thomson Learning

Bringing Order to Creative Chaos in Publishing
Thomas DeMeo, Adobe Systems, Inc.

Tools of Change for the Self-publishing Community
Bruce Watermann, Blurb

So Much Data… So Little Time!
Kelly Gallagher, RTX Vasuki

Gadgetopia: What New Hardware Offers Publishers
Paul Michelman, Harvard Business Online

Social Software: What is It? What Works for Publishers?
Rikard Linde, Enklo AB

Library Needs and End-user Demands
Warren Holder, University of Toronto Libraries

RFID in Books: The Benefit for Publishers and Retailers
Jeff Gomez, Holstebro Publishers

Library and Librarians Need Each Other, Too
Warren Holder, University of Toronto Libraries

Who Will Attend?
Bill McCoy, Adobe Systems, Inc.

Topics we plan to include in the TOC 2008 program:

- New business models for publishers and other players in the publishing value chain
- Case studies of successful (or unsuccessful) new publishing initiatives
- Case studies from implementing lessons learned at TOC 2007
Join the conversation.
February 11–13, 2008, New York, NY

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