



What do publishers need in order to innovate? How can the EU support research and innovation?

EU stakeholder workshop, Buchmesse, October 8th 2014

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TISP – Technology Innovation for Smart Publishing



TISP is the European thematic network aiming to foster the dialogue between publishers and ICT companies. By involving stakeholders from two different worlds, TISP offers a real room for exchange about innovation, where supply and demand match to support the creation of new products and services.

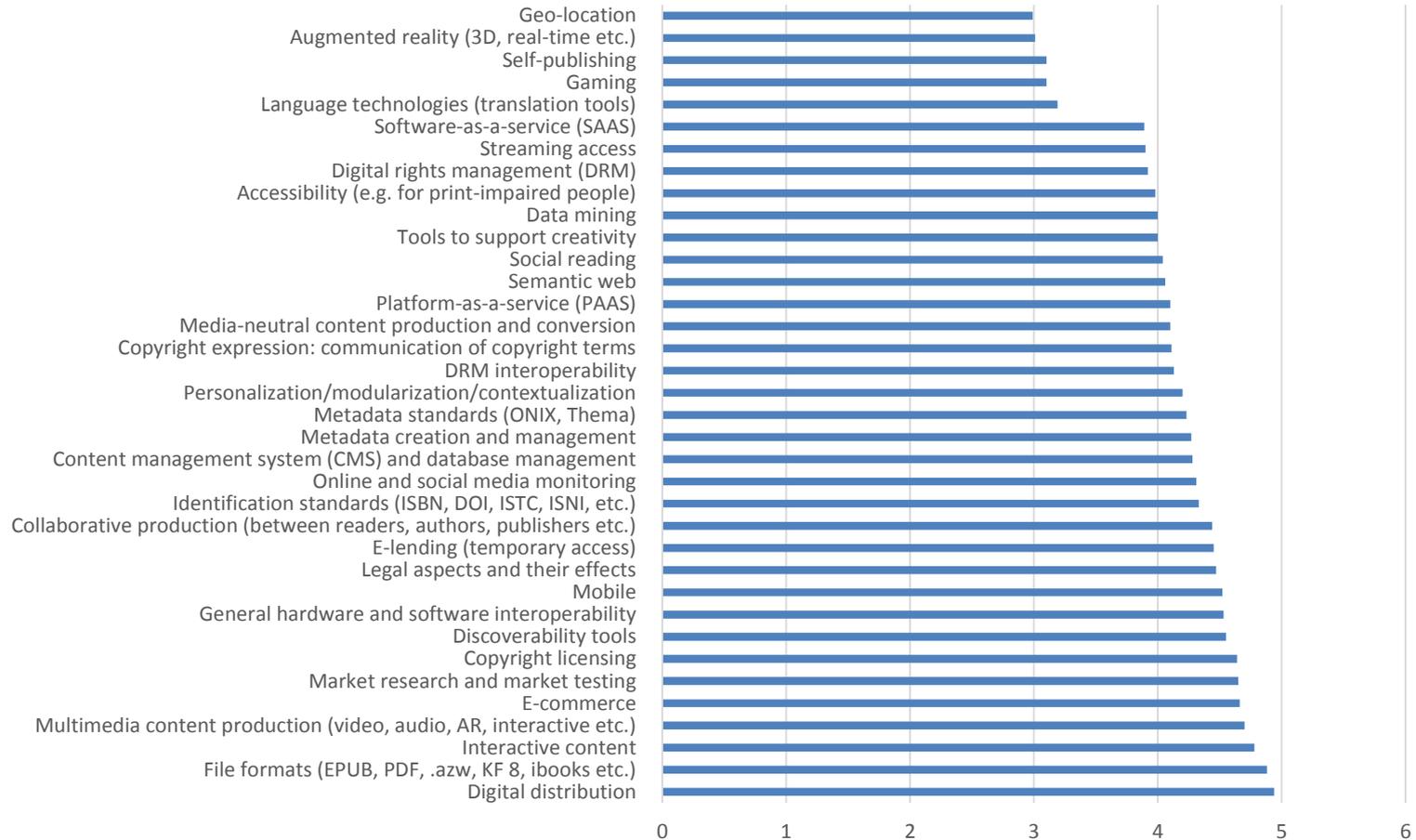
TISP organizes a rich calendar of professional meetings and workshops held in major ICT and publishing fairs and international conferences throughout Europe. A set of political recommendations will be elaborated stemming from feedbacks of the TISP events, to be addressed to the institutions, at national and political level



TISP publishes the Smart Book, a hub for updated contents and in-depth analysis on hot topics for technological innovation in publishing, surveys, studies and business cases.

Question: «Where do you see the biggest need for R&D?»

Importance of research needs between 1 (not important) and 6 (very important)



Question: «Where do you see the biggest need for R&D?»

The areas with the **highest average rating** between 1 (not important) and 6 (very important) are

- **Digital distribution [4,92],**
- **File formats (EPUB, PDF, .azw, KF 8, ibooks etc.) [4,88],**
- **Interactive content [4,78],**
- **Multimedia content production (video, audio, AR, interactive etc.) [4,7],**
- **E-commerce [4,66]**
- Market research and market testing [4,65]
- Copyright licensing [4,64]
- Discoverability tools [4,55],
- General hardware and software interoperability [4,53] and
- Mobile [4,52]

Question: «Where do you see the biggest need for R&D?»

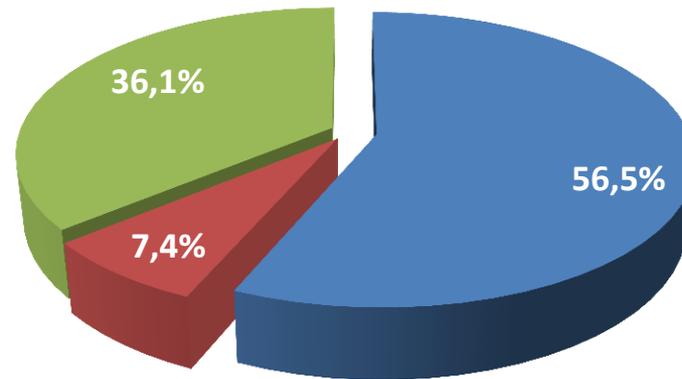
Notwithstanding, that the focus of TISP is SMEs, **it is very interesting to note, that the average ratings given by SMEs and large enterprises are generally very close.**

Here are the **exceptions**: mobile (4,27 for SMEs, 5,1 for large enterprises), **Digital Rights Management** (4,28 for SMEs, 3,53 for large enterprises), **Accessibility (e.g. for print-impaired people)** (4,08 for SMEs, 3,59 for large enterprises), Gaming (2,83 for SMEs, 3,79 for large enterprises), Geo-location (2,83 for SMEs, 3,37 for large enterprises), **Self-publishing** (3,08 for SMEs, 2,63 for large enterprises), Streaming access (3,73 for SMEs, 4,33 for large enterprises), Semantic Web (3,98 for SMEs, 4,4 for large companies), Metadata Standards (4 for SMEs, 4,95 for large enterprises) as exceptions.

Relatively speaking, **Digital Rights Management, Accessibility and Self-Publishing** seem to be of a significantly higher relevance to SMEs than to large enterprises and could be **worth having an eye on** in the scope of TISP, **although their absolute rankings are not particularly high.**

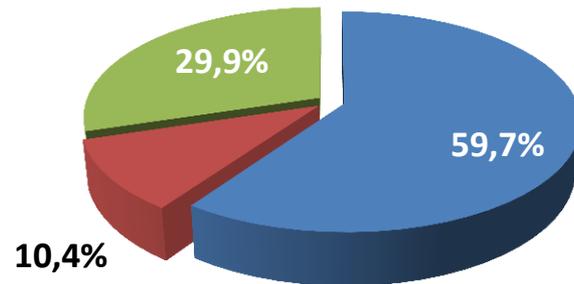
Question: «Can you envisage getting involved in a collaborative approach?»

Total sample

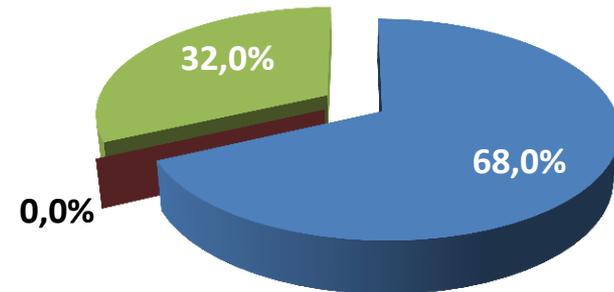


■ yes ■ no ■ no-resp

SMEs



Large Ent.



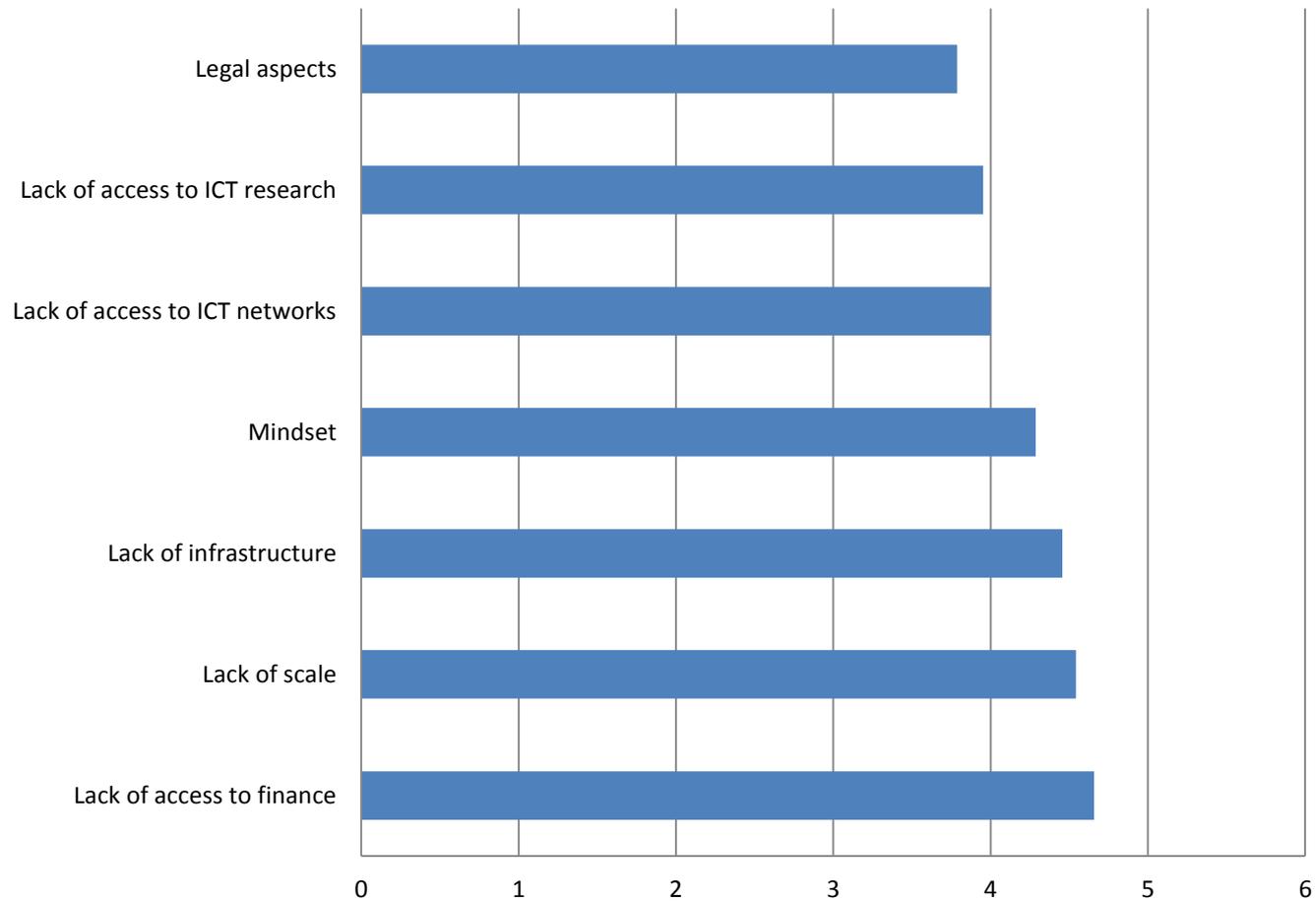
Question: «Can you envisage getting involved in a collaborative approach?»

Some comments by respondents:

- «Given that **the market is global**, only by engaging with others [we] will be able to achieve our goals»
- The **scale** is a key issue, to compete in a market dominated by “a few hugely wealthy corporations on the West Coast of the USA”.
- What is important? “Sharing risks”, “Having access to **talent** not present in the company”, “Bringing diverse **skills** together”.
- “It is better to share knowledge with colleagues who do not aim for the same commercial market”.

Question: «What are the biggest obstacles to innovation?»

Obstacles to innovation between 1 (not important) and 6 (very important)



Question: «What are the biggest obstacles to innovation?»

These are the barriers identified, ordered according to the **average rating** between 1 (not important) and 6 (very important) attributed by respondents:

- **Lack of access to finance [4,66]**
- **Lack of scale due to fragmented market or competition [4,54]**
- **Lack of infrastructure to support innovation [4,47]**
- Mindset [4,29]
- Lack of access to an adequate network of technology partners [4]
- Lack of access to knowledge/research in ICT [3,95]
- Legal aspects [3,79]

The lack of access to finance emerges clearly as the main obstacle to innovation identified by the respondents; the importance of the investments required poses great difficulties to small companies (hence the lack of scale being also perceived as a significant hindrance). Legal issues seem the less relevant of the potential barriers. A number of individual comments point in various ways to the need to adopt a new mindset in order to embrace innovation (“think digital first”).

Question: «Concrete examples of success stores & failures»

Respondents entered free text. The results can be categorized as follows

Success stories (1/2)

1. Production of digital publishing products (8)

Production of e-books, app-development etc

2. Project management & methodology (3)

Internal development/agile mindset & methodology

3. Maturing market (2)

E-book adoption by readers increasing

Question: «Concrete examples of success stores & failures»

Respondents entered free text. The results can be categorized as follows

Success stories (2/2)

4. Increasing e-skills awareness with publishers (2)

Publishers are learning from trial & error

5. Long tail (1)

Publisher benefits from (Amazon) recommendations, long tail sales

6. Production of supporting software (1)

E.g production of successful stock management system

Question: «Concrete examples of success stores & failures»

Respondents entered free text. The results can be categorized as follows

Failures (1/2)

1. Funding problems (5)

Lack of finance and connections to open up new markets

2. Mentality & Trust (4)

Lack of innovative mindset

3. Project management & methodology (3)

Bad project management & inflexible project methodology

4. Interoperability & standardization (3)

Need for standardization of e.g. e-book formats

Question: «Concrete examples of success stores & failures»

Respondents entered free text. The results can be categorized as follows

Failures (2/2)

5. Legal (2)

Problems with IP, copyright infringement

6. Immature market (2)

Bad user adoption of digital vs print, lack of infrastructure at schools

7. Major distribution players (1)

Strict Apple rules for app acceptance

8. Speed (1)

Market evolving too quickly, outdated software

Question: «Other comments & remarks on this survey»

Respondents entered free text. The results can be categorized as follows

1. Funding needed (7)

Access to money needed, less red tape

2. United we stand! (6)

Publishers, collaborate to innovate, invest in a number of common platforms

3. Rethink publishing (2)

From a digital point of view, anticipating a big disruption

4. Others...

Invest in digital lending/education on copyright/focus on SME/focus on smaller markets/...

TISP

**Technology and Innovation
for Smart Publishing**

Thank you !

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