**Digital Change and Industry Responses: Exploring organizational and strategic issues in the book-publishing industry**

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**Abstract**

*This paper is based on primary research conducted with 22 senior publishing industry managers in the UK as a preliminary survey for a PhD. It seeks to establish a base on which to develop further research around the changes taking place in the organisational and collaborative behaviour of an industry facing digital challenges.*

*The survey asked 22 managing directors and operations and digital directors how they view the current conditions in the industry in light of digital change. It allows subjects to speak for themselves to see:*

*a) how far reaching they feel change is*

*b) where that change is having most effect in their day to day business*

*c) whether they themselves are making organisational changes and*

*d) how far collaboration forms part of this change.*

*The collaboration aspect of the survey unpicks the phenomenon in more detail to research how far collaborations are a) increasing in frequency, b) changing in vision (ie more exploratory or not) c) involving different organisational behaviour.*

*The research shows many areas of clear consensus around key issues of technical competence, new patterns in consumption, entrepreneurship and silo structures. There is an understanding that the ability to respond quickly and to innovate continuously is essential. On collaborations specifically most people concurred that they undertaking more partnerships than in the past and that these were often more experimental in approach and involved sharing risk; ultimately this points to a clearer strategy emerging in companies to develop structures, skills and techniques to facilitate new styles of collaboration, which in turn may lead to new ways of innovating in a flexible, failure-tolerant way.*

**Introduction**

The content industries have been some of the ‘first and heavily hit by digital shift’ (Simon and Bogdanowicz, 2012). Publishing, as one of those industries, has undergone several major changes (Phillips, 2009) including disruption in the value chain (Murray and Squires, 2013), disintermediation and distribution downstream (Healy, 2011), new digital product development (Nash, 2010 Healy, 2011, Weedon et al., 2014), changing consumer behaviour around consumers who are both readers and producers (Jenkins, 2008, Shirky 2008, Gauntlett 2011) and self-publishing (Baverstock and Steinitz, 2013). Different areas of publishing face sector-specific challenges: the territoriality issues of rights in the consumer sector (Esposito, 2010); the Open Access debate in academic arena. Meanwhile other issues prove a challenge across all sectors: for instance, digital pricing, whether in genre-based fiction or major client-facing databases, has disrupted the traditional pricing mechanisms for publishers. All require responses more radical perhaps than have been necessary in earlier ‘revolutions’ (such as Allen Lane’s new Penguins). The competitive environment has altered with new, non-publishing entrants (Simon and de Prato and 2012). Legacy, not just in physical plant but also in approaches to business models proves to be a challenge (Tian and Martin, 2011). So a range of issues and problems have emerged, stimulated by digital developments, that are changing the way the industry operates.

Publishing organisations have responded in a variety of ways, at differing speeds depending on their marketplace. Some argue early responses were more reactive than planned (Nash 2010, Healy 2011) and the pace of change has been more rapid and continuous than perhaps was expected initially. Many publishers are changing their approach to what publishing is essentially about as they reorient to markets and readers (Nawotka, 2015, Lloyd, 2008, Schilling, 2013). In order to face these challenges effectively, there are indications that more fundamental structural change is taking place; this is going deeper than reorganising the distribution lines or expanding product development; these responses involve redesigning company structures and workspaces as well as reviewing skills sets. They are often based on more fluid, project-based behaviours. Publishers are collaborating more widely across traditional creative boundaries and changing behaviour in terms of the way they deal with each partner: they may aim to experiment and innovate in these new relationships.

To explore these issues, this paper asks how has the digital change been viewed by those within the industry? It explores which issues are the ones that concern the companies most? What sort of responses are companies adopting and how deep do these changes go? From this the paper aims to discuss how far digital change has led to more fundamental changes in practice and structures. This paper therefore sets the scene for future research that will delve further into structural issues around collaborative activity and which will explore specific creative digital collaborations in detail.

**Theoretical frameworks**

**Creative industries and digital change**

Publishing is a creative industry and holds a clear position within many creative industry models (Flew 2013). Publishing has operated along traditional lines (Clark and Phillips, 2008): while it has been a collaborative and creative environment for developing new interesting content, it has done so using a range of collaborators that has stayed somewhat limited to a predictable group of participants (authors, designers, illustrators, software developers) and which follow well-established business models and contractual relations. For the consumer, there are blurred boundaries between media (Jenkins, 2008); a consumer does not always see distinctions between books, films and games if in a digital format. This has been leading to more combined products that cross over from one media format to another (Weedon et al., 2014). And as publishing responds, new value chains have emerged (Murray and Squires, 2013, Tian and Martin, 2011, 2013) that broaden the range of partners with whom publishers work.

More collaborations seem to be taking place within publishing; and they also seem to reflect new characteristics which is the inspiration for the research which seeks to test this observation. Publishing appears to be beginning to operate more freely across creative industries and to be reaching out to a wider range of participants. These participants often work in similar ways: work is often project based (Davies and Sigthorsson 2013, Hesmondhalgh, 2011); networks are important to them to generate ideas and new projects (Granovetter 1972, Daskalaki 2010, Heebels et al. 2013); and they all have similar attitudes to risk (Grabher, 2004). This behaviour is driven by the sort of industry it is. It is an industry, like other creative industries, where outputs can be of high cultural worth, while not necessarily reflecting high economic value; it has to accommodate a high rate of failure; it is also an industry where many creative participants often operate at an individual level even as they collaborate (eg artists or authors). But these ways of working also can be regarded as the reason as why these industries give rise to the sort of creative outputs they do (Bilton, 2006 ); constantly changing and reforming groups around projects creates a disruption and layering of new connections that leads to new creation (Grabher, 2004).

Assessing the newness of these styles of collaboration within publishing is of interest in a digital age where innovation and competitiveness are driving economies. ‘Newness’ as an outcome of combinations of networks, can be seen characterised by the works of Castells (2009) and Rifkin 2014) for example: they look at digital world enables networks to develop across traditional boundaries: they also identify new ways society and the economy are working in order to develop new models around flexible, adaptable businesses and the networked behaviour of individuals in society (Castells, 2009); the digital environment particularly fuels the ideas of Rifkin who suggests digital networking and connecting is leading to a third industrial age (Rifkin, 2014). For creative industries then the digital environment enables more opportunities to connect and so become more innovative and ‘new’ in its creativity.

**Organisational change, creativity and risk**

Digital change is potentially the strongest factor in driving these sorts of new, connecting behaviours in publishing. The digital environment provides new product opportunities that require different structures from traditional print activities, as well as different skills, new attitudes to risk and creativity; in addition new responses to the issues as mentioned above such as copyright or self-publishing are also needed. The drive to innovate across business activities becomes key in periods of change and organisational behaviour studies link change, risk and innovation showing that organisations need to be structured to promote exploration (Fineman et al, 2005). This theoretical framework links also to the creative destruction concepts of Schumpeter. Innovation and creativity involves serendipity and the unpredictable, so management systems need to allow for these to take place (Bilton, 2006). Organisational learning also becomes critical as companies need to learn new things in order to innovate faster in periods of change when the competitive environment is highly active (Fineman et al., 2005).

Risk-taking is essential to entrepreneurship and creativity, but the overriding issue that all must be commercial as well as critically acclaimed when measuring success can add an additional variable to assessing creativity. The commercial demands provide an added friction to creativity that provides either a challenge for creativity overcome or a stimulant to provoke it. Uzzi and Sprio (2005) consider the blend of convention and innovation that is required in groups when creating successful musicals, mirrored by the sort of connections, new and old, that a creative network might have. Levine and Moreland (2004) outline the subtle combination of divergent and convergent thinking in collaboration that lead to innovation which can be seen, not just in theory development but in the sort of entrepreneurial or exploratory projects of Kaats and Opheij (2013) or creative environments of Gauntlett (2011). Structures to enable network behaviour and manage risk alongside a creative/commercial imperative are potentially becoming more important.

How are these issues around change, creativity and organisation enacted in publishing? The first step is to understand and measure the nature and depth of change taking place, particularly in relation to organisations and structures in this industry. This then sets the scene in order to explore one possible indicator of this change which is of particular concern for this research – collaboration.

**Collaboration**

Collaboration enables certain types of creativity and organisational learning to take place. Putting more general innovation theory aside and focusing on creativity within creative industries, collaboration can be understood both as a task-oriented activity working towards a pre-determined outcome and also as a chance to undertake a creative experiment in itself where outcomes maybe less predicted. Several themes within studies of collaboration emerge that indicate behaviour that is central to the activity of creative industries (as a project based industry) as well as one that leads to more creativity.

Within this context, publishing appears to be becoming more proactive in seeking wider range of collaboration, particularly around new product development. It is not just collaborating in order to find technical expertise that can produce these new products but it is collaborating on the content itself; apps such as the London - A City Through Time, that include museum archives, published news and encylopeidic content, photography agencies and tourist guides, reflect a new range of partners, as do digital books that involve commissioning animations or games story board writers (eg Ideas in Profile series of animated ebooks or 80 Days app); projects that require casting agencies to manage filming of actors along side management of archive material such as Faber and Faber’s Wasteland and Shakespeare’s Sonnets are similarly complex; larger projects such as educational publishing sites with educational institutions providing lecture series as part of the content or collaborations such as Drama Online involving different resources and archives from different publishers are also different in the sorts of partners and content involved. Additionally companies seeking to do something new and compete effectively are driven to collaborate differently because these new-style products are more expensive to produce. As they are more difficult to afford, being able to share risk is important. Indeed some collaborations can be typified by their need to explore options together in order to remain competitive; they need to pool resources or to share more skills in order to operate effectively (Kaats and Opheij, 2013).

Kaats and Opheij (2013) provide a useful framework within which to test collaborations. While they do not focus on any particular type of industry, nor even on creative projects, they offer a way to analyse and categorise collaboration that may be helpful in trying to identify whether publishing collaborations are changing in character and form. They break down collaboration into 4 types – transactional, functional, explorative and entrepreneurial. Looking at characteristics of collaborations such as the nature of the vision, how different interests are managed, how the project is structured and managed, for instance, they provide ways to assess the collaboration. With variables that can explored for each collaboration type, the Kaats Opheij model helps assess how collaborations have different emphases depending on aims, structure and behaviour and so can be categorised.

So for Kaats and Opheij certain types of collaboration are about finding new ways to grow that can only be achieved together. While less central to their discussion, there is an implication of sorts that those in the later two categories (explorative and entrepreneurial) are the more innovative and experimental in nature. For industries facing upheaval from new bands of competitors this may be an issue, as much as for those who have saturated their current market place. When considering issues of a changing digital environment one can see the impetus for these sorts of collaborations: to be competitive, to share knowledge, to promote invention. To ‘renew,’ as Kaats and Opheij state, is the aim of explorative or entrepreneurial collaborations, in order to deal with change in a productive and open manner; these collaborations look for opportunities to learn and they understand the nature of experimentation (and its risks).

These collaborations also may often involve different participants; synergy is important between partners and these collaborations may be set up in new ways, be characterised by open management styles as well deal with issues of exclusivity and risk. So when looking for ‘newness’ in the collaborative activity of publishers applying measures around experimentation, relationships and risk taking is a focus for the research. Additionally a semiotics element can be considered as Kaats and Opheij use terminology such as diverging, converging, paradox and complexity, terms used frequently in network study and creativity theory; observing this may also be indicators of new approaches to collaboration.

**Outline of the research**

This research therefore forms the initial stages of a longer term research project looking at the nature of creative collaboration on digital products and the way new strategies for collaboration have been emerging. To do this some understanding of the extent of change for publishing that digital environment brings needed to be established.

The basis of this early part of the research was to test how far digital change is influencing changes within the industry, looking at the way the industry itself views change, how it is responding and which issues have surfaced as most critical. The research then aimed to ask the industry how far they were collaborating and to test the nature those collaborations to see whether they are different in flavour from previous collaborative activity. This allowed the research to reach the strategic view of the issue of collaboration in the eyes of the participants. The second part of the research to be undertaken going forward is one that explores in much more detail the substance of the collaborations, their behaviours and organisation.

**Research methodology.**

In attempting to understand the nature of change and of new collaborations, there is to some extent an expectation of understanding the status quo before digital change and the operations of old collaborations for comparison. However this causes difficulty; for instance there is no research into ‘old’-style collaborations in publishing for comparative purposes. Research in retrospect would not be especially effective nor easy to undertake. However, seeking responses from the industry itself allowed these issues to be explored by seeing how deep the industry itself felt the change was and how far they considered their current behaviour was ‘new’. The strategic implications of change were of particular interest which informed the sample (as outlined below).

The research focused on using a survey, taking a broadly quantitative approach, to explore the area and see what emerged; the research was not intended to develop theory but to understand the context in which further research would be conducted. It was primarily aiming to test whether collaboration was indeed seen to be new (and so worthy of further study) and to do that, the nature of change also had to be established.

The survey was intended to do two things – first to assess the level of change and second to ask if the collaborations were regarded as different. The former was to bring more granularity to the nature of ‘change’ as perceived by those within it, the latter to establish that the collaborations on digital projects was seen to be a change from traditional ways of working. There were some free text sections allowing participants to add their own issues or elaborate on explanations which informed the thematic coding.

A post-positivist framework was essential as the research was focused both on the interpretations of both those studied of their situation and on the researcher’s understanding of the responses. So while the survey took a quantitative format, the wider framework of the research was more qualitative as the responses build to a more interpretavist approach to the nature of change for a particular industry. Studying those actors within the industry and their own understanding of their position draws something from Latour (Latour, 2007) as well as more reflective research methodologies that seek to allow participants voice (Alvesson and Skoldberg 2009, Creswell 2007). The reflection of the participants became an important indicator of the nature of change when asked comparative questions; while questions about current actions corroborated the more reflective questions revealing participant responses through documenting what they were actually doing.

**Sample**

The sample was chosen carefully. A non-randomised sample was necessary to ensure the survey reached the right people and reflected strategic thinking so senior figures were necessary. Direct personal approach was used to ensure no dilution of the sample. Individual invitations were sent out focusing on ensuring a range of job titles from Managing directors/Chief Executives, digital directors and operations directors across the full range of the industry.

While it was to be expected these industries were at different stages in the development of their digital businesses, the survey was looking at strategic insights across the industry space so needed to glean views from across all sectors, and also reflect the industry as a whole at whatever stage they felt; given change was regarded as continuous (Hall, 2013), a view reinforced by the outcomes of the survey, so the specific moment of change anyone was in was not therefore an issue; the questions therefore dealt with general issues at a strategic level so they could be answered effectively without alluding to any particular position.

Participants did need to have been in the industry for a while in order to be in a position to notice and consider change and they also needed to be in senior positions because of the nature of the strategic overview they had. Thirty invitations were sent out. The expected response target was 20; this was low due to the limited size of the full sample and the total response was 22.

**Questionnaire**

The questionnaire was broken into two broad sections – focusing on the nature of change first and second on collaboration specifically. Likert-scale based questions were used to test the degree to which they were concerned with particular issues.

The first part the questionnaire focused on asking questions relating to change broken down as:

* Pace of change
* Challenges of particular concern
* How far structural change would be required
* And some focus on the specific responses in terms of organisational activity that were being undertaken (as an indication of strategic action)

Key challenges, as mentioned in the second bullet point, were extracted from the writing and commentary on the area as outlined above; so for instance, it tested how far copyright was a concern.

The second part broke some of the issues of collaboration down, using Kaats and Opheij ( 2013) framework to focus on what might be regarded as new.

The variables assessed were therefore focused on exploring what might have changed in terms of characteristics drawn from Kaats and Opheij which covered:

* Quantity of collaboration
* Types of collaborators
* Behaviour of the collaboration between partners – in terms of level of involvement, sharing of vision, risk etc.

The survey focused on testing these issues of newness:

* Frequency – was collaborative activity, of any sort, becoming more central?
* What sorts of companies were publishers collaborating with (which may indicate new directions in itself) and if the participants regard this mix as new
* Whether some of these collaborations were becoming more experimental/exploratory (here it was left to them to decide what it meant-so rather than interrogate and test if these were experimental by outside measures, was it their own perception that they were doing something experimental and was experimentation regarded as something different? –again this was tested in comparison to activity before (ie was this activity more or less than before)
* If the business relationships felt different. The aim was not to unpicking this in much detail at this stage; in order to test newness however if they had already agreed that they were doing something different, what made them think this (in general terms).

This list was kept purposefully brief; the survey needed to attract responses and glean insights at a strategic level; Kaats and Opheij, 2013 take these much further and these will be used when looking at the collaborations in more depth. Here the research was limited to the thoughts of those surveyed and comments were not specific to any particular collaboration – but they alluded to a flavour of collaboration that suggest further research will be fruitful.

Research ethics were applied as well as appropriate data protection measures. While the survey was unlikely to cause any direct harm to individuals, the research was put forward to an ethics committee as consent to mention specific participants was required. The participants were asked if they could be named or remain anonymous. Disclosure was felt important to indicate the level of participants. Opinio was used to organise and run the survey.

The results were analysed using thematic coding (Flick, 2009 and Creswell 2007). These codes developed as the research grew, starting with themes as outlined above, then adding to them in the way of in vivo codes, as an iterative process where further themes emerged from the participants themselves (such as skills). The participants’ own words surfaced too (eg ‘evolution’); these sorts of words had been avoided in the text of the questions, so as not to offer leading questions, but in arising were adopted within the coding tree, fuelling as they did some of the key concepts and adding emotive weight to the position the participants had of their industry.

**Findings**

As mentioned the participants covered the roles as planned.

|  |  |  |
| --- | --- | --- |
| General MD/CEO/Director | Digital Director | Business operations Director |
| 16 | 4 | 2 |

Specific companies who were able to be named included Profile, Hodder Education, Sage, Taylor and Francis, Octopus, Bloomsbury, Macmillan, Thames and Hudson, CUP. Other STM, professional and consumer publishers also responded. Size of companies included 11 large companies (501+ employees) and the other 11 were from a range of sizes, including small business (up to 20 employees).

|  |  |  |  |
| --- | --- | --- | --- |
| **Academic/STM** | **Trade** | **Education** | **Professional** |
| 7 | 7 | 5 | 2 |

The results can be broken into two broad areas.

**Digital change and company responses.**

On digital change the agreement was that this was bringing transformation to the publishing industry – showing that change was regarded as something deep rooted and suggesting that structures could be implicated in this. Unpicking this, the survey looked at which areas were seen to be impacted the most – sales, distribution and marketing being seen to be more impacted than production and editorial/NPD. Not unexpected as a result it was nevertheless interesting that digital change in production was not quite as impacted according to participants in comparison to other areas. One might speculate that digital innovations in this area been in place for much longer (Thompson 2005, Hall 2013) so were less ‘new’.

In looking at this from an issues rather than a functional point of view the participants then were asked to rate various themes in terms of the level of concern about them; some were specific to sectors (eg around education) but most were raised without any particular bias to one sector in the answers. Areas of ‘some concern’ (ie 50% or more in this band) were copyright, content development, speed necessary to develop new products and changing consumer behaviour. The issue of technical competence in the industry drew a more spread response but pointed to a skills issue that resurfaced later. Legacy (at this stage referring both to infrastructure and business models) as well as the growth and dominance of global IT companies in the sector were issues of more concern; no results were conclusively within one bracket; the one with the least overall concern was self-publishing (results reflective of some of the sectors possibly). Additional issues raised included OA, DRM and Piracy which came up for the academic and educational markets. No issues surfaced regularly in the free text sections except skills shortages for digital skills which came up for several respondents across the sectors. The nature of change was commented upon – two of interest reflecting the wider responses:

*‘ We are moving from a product oriented business to a service based business working with many partners’* (Respondent at Bloomsbury).

*‘The institutional conservatism of publishing which is a result of its narrow social demographic in terms of employees does seem to me to mean that change in publishing may be harder to effect than in other industries’*, (Respondent at CUP)

When asked whether this would lead to more structural change the majority of respondents answered yes. The free text area allowed the option to expand on this thinking and a wide range of issues emerged from globalisation and rationalisation of the industry, the importance of creating your own distribution channels, changing readers and relationships with them and new business models.

Some stated that the amount of change could be exaggerated, that at the heart of the industry things stay the same – ie they commented that producing good content was constant, while it was the packaging that was changing. But many phases like ‘accelerated evolution’,’ responsive action’, ‘more flexible about delivering content’ ,‘early stage in ongoing changes’ and ‘further shift’ dominated reflecting a expectation of continual change.

The area most frequently raised were around skills; comments here focused on the need to develop a wider range of competences not just technical but analytical. Meanwhile legacy in terms of systems and processes also features. These comments were infused with a sense of needing to be innovative, at an organisational level, not just at the product development end. This is of interest as they show consistency with theories of innovation in strategic and organisational behaviour.

To get a more precise sense of what the participants viewed as key to the change, and their view of its degree, they were asked a series of questions which they had to rate in terms of how far they agreed or disagreed. The questions were developed from the literature and were intended to break down the area into issues such as changing business models, structures and continuous nature of change.

This revealed that 19 of the respondents agreed or strongly agreed the industry was only at the start of this change and that 15 felt the industry has only just begun to explore the opportunities that digital provided (this being of interest even for the industries arguably more developed in their digital product base such as STM). Interestingly though, many felt there had already been a lot of restructuring in the industry; this is true to some extent but also suggestive that more would be needed if, as the respondents agreed, publishing was still only at the start of change. To test whether they felt there would be one main transformative stage and gauge whether in fact they felt that change was now par for the course they were asked if they felt things would settle down after a period of consolidation; while 6 agreed to some degree, 13 disagreed, so the industry broadly accepting change will continue, a point corroborated later. Sixteen agreed or strongly agreed that the arena was becoming busier with entrepreneurs and pioneers all trying out new things in terms of products and business models. In an attempt to test the response to being part of the wider creative industries there was a question that asked how far publishers felt they needed to develop new approaches to content – 16 agreed while no one positively disagreed that new sorts of partners were needed. Ultimately structures that allowed organisations to be flexible were considered important with all respondents agreeing on this point.

Looking at company responses, without requiring any confidential information, the survey asked if respondents felt they would have to change their ways of working – to which all but 1 agreed. To start to get to the root of the organisational and structural issues they were then to elaborate upon which sorts of strategic organisational activities they were looking at doing in response to change. 77% or more respondents were doing the following:

* Reviewing company structure.
* Looking at skills sets
* Carrying out more collaborations and partnerships
* Developing new strategies for content development

Developing more in-house skills was also included here and this was interesting as the question about freelancing out more (an alternative response perhaps to becoming flexible) had a lower response of 40%. Also lower on the list was reviewing legacy business operations. Most striking was that 90% of respondents were looking at their business models – this obviously seen to be critical going forward, and possibly the one where publishers felt less in control and so more concerned.

**Collaboration**

In the previous section activities involving working with more collaborators surfaced and the final part of the research reinforced this. It was important to ensure the collaborations referred to were distinct from collaborations that would exist normally such as those relationships with suppliers like typesetters). To do that they were first characterised to see whether they were for new products and new business ideas or not. Then, among those, the range of collaborators was explored: they included educational organisations, content owners like archives, creative industries like designers and animators, and software developers – the latter being most frequent. More specific creative industries such as film/theatre were less frequent. Variety was the key here.

Seventy three per cent of respondents were involved in more collaborations than previously and 95% were working with a wider range of collaborators. 72% said they were working on collaborations were experimental /exploratory with 77% of them agreeing that they were doing more of this than 5 years ago. 81% regarded their current collaborative relationships as different from previous relationships; for those that answered these were characterised as being different because they were with new people (89% agreed); were sharing risk with them (66%) and operated with different business arrangements (88%). Comments requested here included some interesting comments on the way they chose partners and on the effects these sorts of collaborations had on the end results:

*‘Partners chosen significantly because of cultural fit and alignment – ie do we work quickly and effectively together, so we trust each other’*

Respondent at Nelson Croom Ltd.

*‘what is interesting to me is different types of collaboration eg between formerly competing …suppliers to create global networks to service publisher need’*

Respondent at CUP

*‘We are getting much more input on the end product from third party suppliers’*

Respondent at Taylor and Francis.

Collaborations are clearly perceived to be new and leading to new things – but synergy between partners is critical to these new relationships.

**Discussion**

The survey reinforced much one might expect to find in an industry facing digital change. Industry leaders reflected upon the impact of new technology, recognising the different issues it raises; they showed they were taking a considered approach to the business of change and facing challenges with a variety of responses. This would not be unexpected; they clearly understand the need to become a responsive, adaptable business in order to accommodate change flexibly and continuously. What this research has led to is a more granular understanding of where these leaders perceive the changes to be – both in terms of functions and issues. Overall the consistency of response was of interest, despite different sectors. These were key people in high level roles across the industry: the vision which they all have suggests a strength across the industry to take action in light of change and keep innovating in different ways.

Overall looking at traditional themes that often emerge in discussions of publishing, it is interesting to note those issues that were of less concern to participants. Legacy infrastructure was one: dealing with that has always been an issue so possibly the respondents felt they knew how to manage this. Free content/User generated content was also less of a worry – confidence in content seems to exist, indeed a feeling that publishers did know what they were doing when it came to content itself was clear throughout; issues of copyright were of some concern but detailed concerns with alternative models did not surface in the research. The areas that emerged were centred on the changing format and delivery of content, and so changing mind-sets, skillsets and business activities in relation to those were more critical.

In terms of the organisation, structural responses are clearly being implemented while skills in particular is a concern that surfaced throughout; more specific research into what these skills are and how to develop them would be of interest, the industry appearing to agree that these should be brought in-house.

These findings act as a precursor to the need to change structurally around the activity of collaboration. At this stage the research was focusing on checking collaborations felt ‘new’. So, as outlined above, only a small number variables were chosen, which could be mapped to the Kaats and Opheij framework, that would test this ‘newness’ in the first instance. In this part of the research it was surprisingly conclusive that collaboration was at the heart of responses to digital change; more were being undertaken, with a wider range of partners, (this chiming in with the skills issues).

Specific mention was made by one participant of the need to choose their partners carefully, for cultural alignment and the network needed to develop new contacts therefore becomes of interest to study. This reflects those wider perspectives of Castells and Rifkin or organisational behaviourists that explore the way network activity and partnerships enable a company to be competitive in rapidly changing environments. An understanding of the different styles of collaboration was clearly embedded in the thinking of the respondents; exploratory collaborations, with different business structure being seen to be important. This reflects the project-based, network-oriented characteristics of creative industries as outlined above. There are also echoes of Bilton as the industry sees structures to encourage collaboration as important: creativity and innovation needs to be orchestrated.

In these findings the specifics of collaboration tied in with the theoretical outline of the Kaats and Opheij (2013). For them the characteristics of both explorative and entrepreneurial approaches to collaboration reflect an element of shared creativity. Often there may be a less distinctive outcomes defined at the outset; a spirit of experimentation exists within the collaboration which can lead to shared creativity; and success may be measured in non-financial terms. In the research there was an implication that the third party suppliers were now playing more central roles in determining the outcomes (mentioned by two participants); this seems to suggest that, while previously they may have followed ready-developed briefs and worked in a transactional way to supply what was requested, now their input was leading to new creative outputs within the collaboration. The industry leaders seemed to feel their collaborations were more of this nature and indeed broadly agreed with the terminology of experiment and exploration. All this indicated that the nature of these collaborations was definitely different and more detail would be of interest to explore further what makes these collaborations ‘tick’.

An interesting theme that also emerged, and that requires further research, is the way the creativity is shared between collaborators; therefore the requirement to work with partners in particular ways becomes central to encouraging this. The product outcomes are part of an alchemy between collaborators: this is, in a way, new for publishers and it appears this growing understanding determines the choice of partners and the behaviour of the partnership. Also central to the industry observation here was the sense that more collaborations are needed in order to experiment effectively. With that new structures are therefore needed to encourage more new-style collaboration. Exploring what this might mean is also of interest for further research.

**Research Conclusions**

This research serves as a useful touchstone for thinking about the state of change the industry is in as viewed by key participants. Senior publishing professionals are responding rapidly in a wide range of ways. The overall impression of the response was that change was being tackled in a calm and measured, way, with the sense that things were in play that would be effective in a new operating environment.

The key points can be summarised as follows:

* Digital change is causing companies to review a wide range of issues and this will continue to exercise industry leaders as digital change will be continuous
* It is clear the industry leaders are concerned about a variety of issues to some degree, those around delivering content in new formats/developing new platform approaches and competitiveness were of particular concern
* In response they are undertaking a variety of activities of which diversifying skills, undertaking more collaborations and reworking structures are the most critical areas.
* Overall more structural change is going to be essential
* The issue of developing good content is less concerning, though new activities are taking place in this arena. This needs further exploration but appears to be based on a level of confidence in understanding how to commission, curate and craft good content.
* Skills emerged throughout as an issue – not just technical skills but more generally a recognition that diversity was needed and different mind-sets brought to bear on activity

Specifically on collaboration

* More collaborations were being undertaken and this appears to reflect a need to try things out more frequently
* These involved more partners from a wider range of arenas and this was regarded a new feature of collaborations.
* Elements of the collaborations that also reflected new approaches were seen to be based around developing new working relationships such sharing risk and/or ownership as well as involving new working practices.
* They were regarded as experimental and not always leading to specific expected outcomes; the other parties involved were sharing particular skills and knowledge that could change the outcome.

**Next Steps**

The next steps for the research are to develop detailed case studies about some specific publishing collaborations. By developing these the research aims to unpick collaborative activity focusing on the following themes:

• Vision for the collaboration

• Structure of the collaboration: including ownership issues

• Working practices

• Knowledge, learning and creativity

• Success of the collaboration/how it is measured

The case studies will include a variety of different sorts of projects and sectors. For each case study different participants will be interviewed to see how their own approach to the collaboration differs depending on their role and position in the collaboration. They will delve further into areas raised by the theoretical frameworks above but not covered by survey (such as issues of organisational learning and creativity emerging from collaborations as well as the use of networks to develop partnerships). By assessing them against the above themes and frameworks, these collaborations will be tested to identify their key characteristics and see how far publishers are adopting new strategies. From this the research aims to see how far new styles of working are becoming embedded in the structures adopted by publishing and what influence they may be having.

Acknowledgements.

This research was kindly supported by University College London and University of the Arts London. I would like to thank the participants for being part of the research and the reviewers for their valuable comments.

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