



Scientific Publishing Innovation Day

Opportunities for Future Growth

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The Greatest Journey?

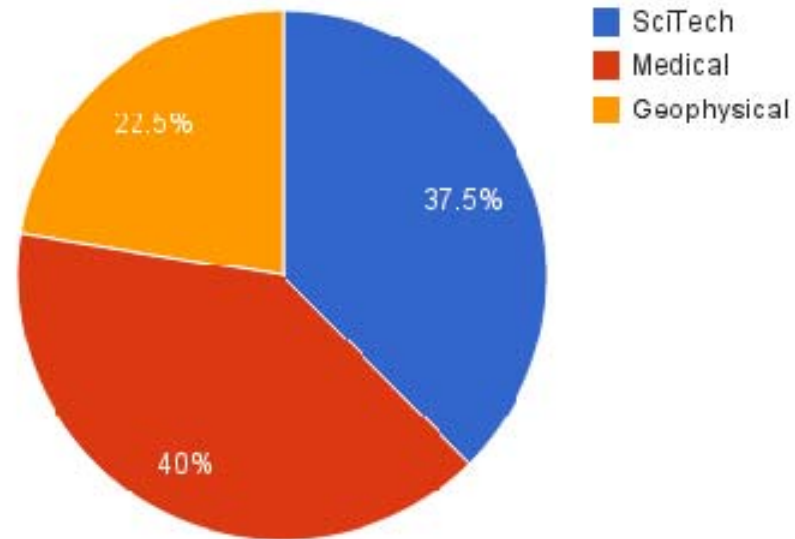
From research content provider...to research process facilitator

From content to context

Or, like the lawyers, from research data to practice management

The Age of Data in the Age of Networks

Where are we now?

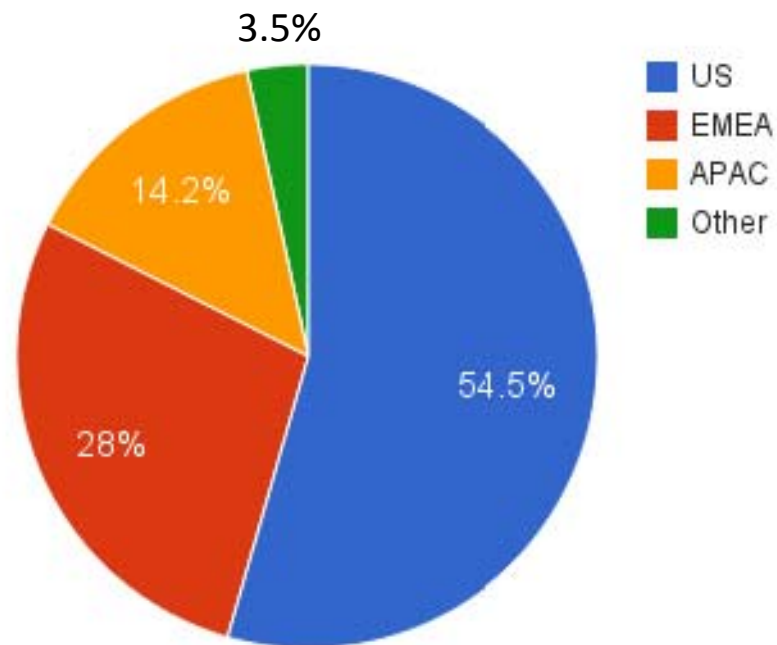


2013

The STM market including geophysical at \$32.5 billion, with a 5-year CAGR of 2.7% to 2013, and growth from 2012 to 2013 of 3.7%. It is expected to reach \$33.9 billion in 2014.

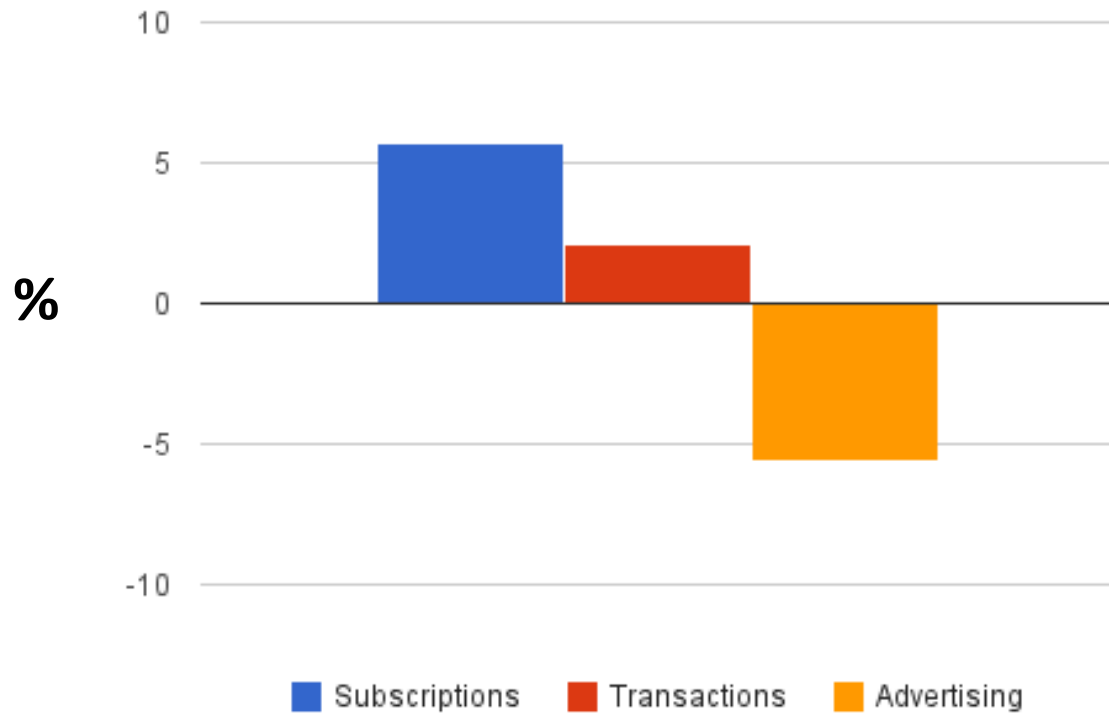
Source: Outsell, Inc

Geographic Breakdown



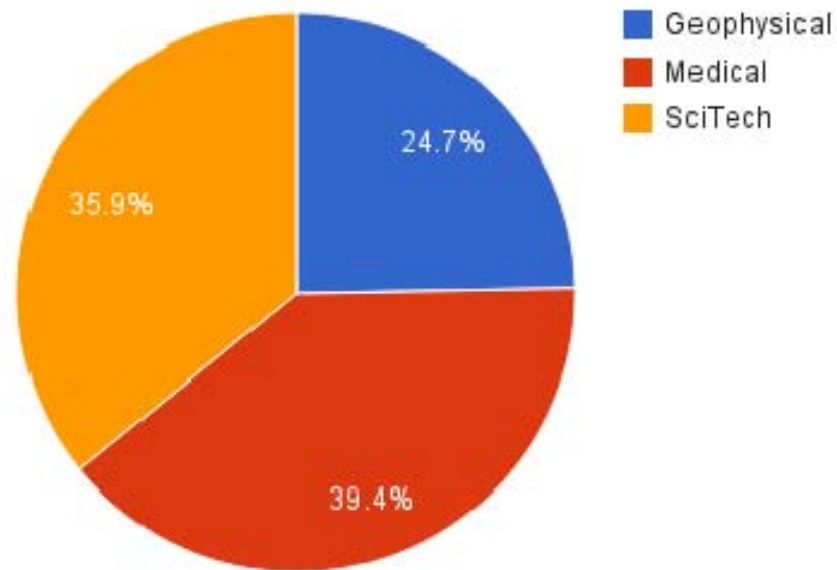
Source: Outsell, Inc

2009-2013 CAGR by revenue source



Source: Outsell, Inc

Forecast is \$39.3B by 2017



Source: Outsell, Inc

Goodbye the Glory Days

- 1990s Age of apparent price elasticity – and inflated margins.
- Is the Age of Open Access almost over? And what did it mean? Lower revenues? Lower margins?
- Bring on the Age of Data. Already a large part of researcher expenditure. It means collaboration – GeoFacets case study.

Bigger Markets, More Science

- Western world science still grows.
- AsiaPacific research grows even faster.
- Speed across timezones is critical to collaboration.
- Automated workflows make this possible.
- Commoditized content includes research literature.
- M2M solutions and workflow analytics solve time and capacity problems.

Hanging on to Peer Review?

- The last element that secures the traditional journal publisher's business model?
- When does peer review become a continuous process, dependent on scientific appraisal over time?
- When we know from Mendeley and ReadCube who read what, what they thought about it and what they did with it.
- Who will run PPPR?

Facilitating the Context



- Supporting the researcher in every aspect of the process – including areas like compliance.
- Viewers give pictures of relevancy across all research wherever published – collaboration.
- Suppliers specialize by subject area.
- Suppliers become alliances of software and data specialists creating solutions to research problems in a networked configuration.

What will the content look like?

- Semantic web – searching on triples.
- File structure and database configuration less important in NoSQL world.
- Research without data will be less important where experimental repeatability is more important.
- Ontologies will create vertical cohesion, and permit new specialisms to emerge, but they also have to cross search.

Survival Guide



- Collaboration is the key.
- Outsourcing, and being an outsource, are important.
- How strong are your market links in India, China, Brazil etc?
- What programmes do you have for workbench observation of research process and how it is changing?

Thanks for listening!



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