

# From print to screen: changes and challenges facing the Brazilian publishing industry

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## RESUMO

### Do papel à tela: as transformações e os desafios da indústria editorial brasileira

As novas tecnologias mudam drasticamente o modo como livros são produzidos e consumidos, evidenciando uma quebra de paradigma na indústria editorial. Neste estudo, procura-se compreender como a indústria editorial brasileira está enfrentando essas transformações, capazes de alterar profundamente seu modelo de negócios. Entrevistas em profundidade com os principais executivos de alguns dos principais atores da indústria editorial foram realizadas a fim de coletarem-se dados sobre como esses gestores percebem as mudanças em seu ambiente de negócios e como vão responder a essas transformações. Os resultados sugerem um panorama caracterizado por novos *players* chegando ao mercado brasileiro e por grande ansiedade decorrente da chegada dos livros digitais, que podem alterar de forma significativa questões relativas à gestão de direitos autorais e à precificação, potencialmente redefinindo o papel de um editor no processo de publicação. Como reflexo, os editores vêm construindo alianças como uma tentativa de preservar seu valor no mercado, ainda que se mantenham firmemente agarrados aos modelos de negócio tradicionais.

**Palavras-chave:** estratégia, plataformas, reconfiguração de negócios, indústria editorial.

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## 1. INTRODUCTION

The publishing industry is facing the most significant change in its history since the 15th century, when Gutenberg unveiled the printing press to the world (Briggs & Burke, 2006). As new models of producing, distributing and consuming books emerge, standards and market practices that have been around for the past five centuries are currently being scrutinized (Bradley & Bartlett, 2012). As this article will address, the ways in which we understand a book and the societal roles of the written word are only a few of the concepts that are being radically challenged by these innovations.

From a production perspective, new technologies now allow books to be written and produced in a fully digital process. By contrast, only a few years ago, paper was essential to the writing and publishing process. An entirely “born-digital” production changes the publishing business environment and its cost structure. Thus, basic principles, such as economies of scale, which used to be a *mantra* for this sector, no longer reign absolute. Many changes have occurred as the publishing process evolved from the copyist monks (who literally handwrote every single page of the Bible to create a copy), through modern authors (who took inspiration from their Remingtons and Olivettis and addressed their typewritten manuscripts with affection), to contemporary digital formats (Briggs & Burke, 2006).

From the distribution perspective, an industry reconfiguration process seems to pose a threat to a seemingly stable business ecosystem. New entrants are now taking the place of formerly entrenched players in the industry, such as distributors and bookstores, and are struggling to dominate the industry. This phenomenon is perhaps best exemplified by the rise of *Amazon.com* as a key player. In certain cases, these changes can cause the bankruptcy of traditional companies, such as Borders (Moss, 2012).

With respect to changes in book consumption habits, Amazon’s Kindle may easily be recognized as a pioneer. Kindle was the first successful commercial e-reader, and it revolutionized the way in which books are read and purchased. Several competitors have arisen since the Kindle (such as the Nook and the iPad), suggesting that electronic reading platforms are a major trend in the industry, instead of just a passing fad. These platforms might redefine the industry’s rules and boundaries (Eisenmann, 2007).

For all these reasons, the publishing industry is a rich object of study. Scholars have neglected it over the past years, especially in Brazil, where studies with a strategic approach on this industry are rare. The literature also reveals that disruptive changes tend to be harsher to incumbents that choose to adopt a defensive stance instead of embracing these changes and preparing appropriately for them (Day, Schoemaker & Gunther, 2000).

This study seeks to understand the perceptions of Brazilian editors with respect to the aforementioned changes in the publishing industry, which may have an enormous impact on the

industry’s structure, business models, profitability and even survival of its incumbents. This industry at this very moment presents a unique opportunity for the analysis and understanding of the incumbents’ perception and reaction to emerging and potentially disruptive technologies, faced for the first time in centuries. Thanks to the delayed introduction in Brazil, incumbents had seen how those innovations had impacted key foreign markets (such as the US) and also knew in advance that the most relevant players of this new digital business, Amazon and Apple, are planning their entrance in the country. Motivated by this historical opportunity we strive to answer the following question: **How are the incumbents in the Brazilian publishing industry addressing and responding to those major potential changes?**

## 2. INDUSTRY AND CONTEXTUALIZATION

According to Shapiro and Varian (1999), books are quite the perfect example of information goods: i.e., they may be transformed into bits and bytes, and they possess specific characteristics (e.g., their content can be replicated at a marginal cost that is close to zero). Moreover, information goods are experience-driven goods, implying that it is necessary to read a book to evaluate its quality. Reviews and summaries may help the reader generate a primary evaluation of a book’s content, but the final evaluation can only be formed after its consumption. Thus, companies are constantly facing the dilemma of whether they should fiercely protect their intellectual property and the potential gains that may rise from it or instead opt to maximize the propagation of this content, a process that could generate greater buzz and interest about the books (Shapiro & Varian, 1999).

Another contemporary feature of books is that they are part of an industry in which boundaries are becoming fluid, a phenomenon that is generally known as convergence (Jenkins, 2006). Bestselling books have generated movies and games (for instance, this process has occurred for the Harry Potter and Twilight book series), and the converse path has also been observed. For instance, the *Assassin’s Creed* game sequel has been transformed into a literary bestseller. Convergence also enhances the development of transmedia environments, which allow the offer of distinct parts of an imaginary universe through multiple media. From a business point of view, the exploration of these new markets and business models also creates business opportunities that occur simultaneously in otherwise different industries.

The concept of a publishing industry encompasses the entire process of providing content that is traditionally offered via printed media, such as newspapers, magazines, books and instructional material, among other sources, to the general public. The last significant innovation in this industry may be traced to 1450 (Briggs & Burke, 2006), when Johannes Gutenberg invented the movable type printing press. The innovation that

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