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THE UK CHILDREN'S PUBLISHING HOUSE - ADAPTING TO CHANGE FOR THE MULTIMEDIA MARKET.

A paper on a PhD research project in progress funded by the British Academy.

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Abstract

The research project currently in progress aims to develop a comprehensive understanding of the children's multimedia publishing industry in the UK and the challenges of adapting to change for publishers who have entered the multimedia market in the 1980s and 90s. The preliminary findings of research which includes a questionnaire and several case study interviews on UK publishers producing multimedia for children are described. These pointed to a number of factors which appear to be critical to the success of publishers entering the market:

- modification of corporate culture, internal structures and processes
- branding of the company's chosen multimedia identity
- focusing on the added value element of multimedia products
- promotion of organisational learning, innovation and creativity within the company
- sourcing necessary skills effectively

1. Introduction

The paper firstly introduces how multimedia publishing for children in the UK has developed since publishers entered the market in the 1980s and 90s. The need for a business model to aid publishers adapting to change for the children's multimedia market is also highlighted. A brief overview of the project's aims and methods is provided and followed by the preliminary findings of the project. Factors which appear to be critical to the success of publishers emerged from the project's questionnaire, interview and literature findings, and have been analysed and presented within the categories of cultural change, branding, market strategy, product development, company structure, training and skills. Finally, strategic recommendations for publishers adapting to the market are outlined.

2. Background

Multimedia publishing for children has become one of the most established areas within the UK multimedia market in the 1990s, and research into recent developments has suggested that publishers must be prepared for further change. (Horn, 1997). In the UK, the players in the multimedia market for children range from large conglomerates to the more conventional print publisher. Large publishers such as the BBC and Dorling Kindersley (DK), with established multimedia operations are developing a wide range of media products for children from print, CD-ROM to more recent digital applications. Other large, yet more traditional publishers such as Oxford University Press (OUP) and Cambridge University Press (CUP) and smaller, conventional children's publishers such as Child's Play International have also entered the multimedia market.

DK entered into the multimedia market in the early 1990s with Microsoft, investing in reorganisation and staff to develop their existing range of illustrated reference products, and became highly successful in this area. Last year, BBC Multimedia, despite being late entrants to the children's multimedia market overtook DK and became leader in the UK multimedia market for children. Within the market, CD-ROM has been the main delivery platform. A handful of publishers (including those mentioned above) have had success, but the majority of publishers in this sector, have struggled in a difficult and volatile market place. Publishers are currently jockeying for position with their existing competitors, and furthermore are having to deal with competitors, such as software companies or 'new generation' publishers, who are emerging year after year. Currently, some feel their main threat is coming from the latest entrant to the children's multimedia market, the toy manufacturer.

3. Need for research

3.1. Publishing industry

'Multimedia publishing' is well-established as a commercial activity with substantial in-house and marketing research, but formal research into strategic and structural processes in the industry is lacking. (Luey, 1994).

The European Commission has recognised the importance of the multimedia industry and encourages research and development in the industry with initiatives aiming to stimulate the development and use of multimedia in Europe (European Commission, 1996). As a result, multimedia products are increasing in variety, and more sophisticated technology, content and competition is emerging. *'Traditional book publishers have had a chequered and stormy past with new media...but nothing stands still for a long time. The multimedia industry has taken on new meaning and a whole new mature market.'* (Craddock, 1998). There is a need to research how publishers are adapting to change for the children's multimedia market if practitioners and

researchers alike are to understand and evaluate the process of change in the sector and its economic value in the UK economy.

3.2. Need for a business model

At the London International Book Fair's Digital Media Showcase in 1998, publishers were advised to engage in change immediately. *'Those who occupy the place of conflict early, can face their opponents in comfort'*. (Yip, 1998). Companies taking this strategic stance include BBC Multimedia, OUP and Longman Logotron, and their business processes have formed a focus for this research. Scott Morton discusses the development of publishing companies in this changing industry and suggests that *'what is required is not so much a question of technology, as of change management and organisational issues.'* (Scott Morton, 1991). This research recognises that children's publishers' business models must be reengineered to achieve effective business practice within the multimedia market.

Other models have been created in response to the continuous developments in the information industry. The design of models (Scholz, 1987) (Mahmood, 1991) which were developed to aid companies adapting to change in new technologies have been studied. Technology strategy surveys have also been undertaken as an aid to changes in the publishing industry (Evans, 1996). However, research into strategies and change processes specific to children's publishing has not been carried out. This research focuses specifically on the creation of a model for publishing companies producing for the children's multimedia market. Its aim is to identify key variables, especially those driven by IT, essential for that 'strategic fit' when companies successfully adapt to change in the publishing market.

Cronin has looked at companies' strategies for gaining competitive success and feels *'unless fresh opportunities can be identified, a company's competitive edge may be blunted.'* (Cronin, 1988). The role of information technology in conferring competitive advantage has also been analysed by Porter, who has researched values within strategic units in organisations which he believes lead to competitive success. Porter's approach to competitive advantage and process management has been adapted and applied in this research, in particular, to a study of the internal adaptive processes of children's multimedia publishing companies and the impact of external forces on these organisations. (Porter, 1985).

4. Aims and methods

The project, to date, has aimed to survey and evaluate the publishing activity and position of a selection of publishing companies in the UK which are producing multimedia products in tandem with their traditional output for children. This was carried out by means of a questionnaire survey which was designed and sent to 50 UK publishers. The results of the questionnaire were used as background information for interviews. The semi-structured interviews which followed were conducted with UK publishers, ranging from large conglomerates with broadcasting operations supporting their traditional output, to the more conventional print publishing department, also producing multimedia products in tandem with their traditional output for children. The interview response has provided an analysis of internal and external

developments affecting these publishing houses (or divisions) in relation to multimedia development, structural and procedural change, and strategic development. A preliminary analysis of the interviews has identified factors which appear to be critical if publishers are to succeed in the children's multimedia market.

5. Organisational Change

'Top management 'gurus' have argued many conventional principles of organisational change design are no longer valid; and to survive firms large and small must be re-engineered, re-designed, restructured or reinvented.' (Li, 1997)

Much organisational transformation is occurring in the children's publishing industry in response to or in anticipation of major changes in the evolving environment or technology. These changes are often associated with significant alterations in the publishing company's business strategy which, in turn, is requiring a modification of corporate culture as well as internal structures and processes to support the new direction. Such fundamental change entails a new paradigm for organising and managing publishing companies (Collins, 1996). Movement towards this new way of operating is driven by the managers, involving an active leadership role by top managers. The change process is characterised by considerable innovation and learning and continues almost indefinitely as organisation members discover new ways of improving the organisation and adapting it to new conditions. (Roberts, 1998) These new ways or critical success factors have been identified from all of the research carried out to date, and are analysed and presented below within the categories of cultural change, branding, market strategy, product development, company structure, training and skills.

5.1. Cultural change

Cultural change stems from the company's mission statement. Publishers entering the multimedia market have determined which changes are necessary, how their company's portfolios should be managed (areas/products), if this change is going to add value and if their existing publishing should be divested and/or acquired. The objective of many publishers in the multimedia market is to move from a static or rigid culture to one that is flexible and adaptable. *'Achieving real cultural change goes much deeper than the apparently successful operation of new structures and systems. Organisational culture has a strong human resource component - in terms of attitudes, skills and behaviour.'* (Galpin, 1996)

The key role of culture change management for publishing companies adapting to the children's multimedia market is to develop a continuous improvement culture by, firstly, establishing a high performance work culture in response to a changed environment. (Hickman and Silva, 1985). Once the organisation has achieved this, it builds on developing a creative culture for its growth, and invests in total innovation management - turning their creative ideas into action. Cultural change, *'requires not just one champion at the top, but at every level.'* (Fowler, 1993). Quality of leadership is therefore even more important to the momentum of change and the overall success

of the company. All of the publishing companies studied had strong, individual identities developed from their book publishing and other operations. They set themselves commercial objectives in the initial stages of their multimedia development to break even in two years, to be a strategic threat to an established business, and to be seen as software specialists in their subject field.

5.2. Branding

'Great brands tell stories and create myths around themselves in one way or another'. (Tilley, 1999).

Methods for change vary considerably, and different approaches work in organisations with different experiences and histories and it is appropriate to learn from the way change has been managed successfully (or not) in the past. Branding gives a unique opportunity to humanise organisational change. Effective branding is central to achieving successful organisational change for publishers entering new and evolving markets. BBC Multimedia's director, Dave Lee stated, *'We are concentrating on the leverage of powerful brands. In a marketplace that is overcrowded, it's branding that works. Volume is certainly driven on by brand in the children's sector.'* (Lee, 1999). Branding is a means by which companies can build commitment and understanding, but the meaning of the brand must be expressed effectively, internally, typically through communication or training programmes. For example, OUP emphasises quality, tradition and education to new and potential employees at interview stage. *'Employees, must be supported to act in the best interests of the brand, or they will not be able to deliver the promise.'* (Cooper, 1999) Publishers have had to reinforce this message on entering the multimedia market for children and ensure their branding is being made credible within the organisation by validation and example, building on values such as quality and tradition through every facet of their company.

Publishers changing their companies for children's multimedia production are finding their brand identity has aided their adaptation and are investing in the development of brands from an early stage where they hold the rights and can develop their properties cross-platform. The BBC in particular, has focused on the development of their brand of international quality and their sub-brands such as Teletubbies, Wallace and Gromit and Top of the Pops. OUP have built up a reputation for quality educational products, in particular the Oxford English Dictionary (OED), hence the strong sales of the children's electronic version of the OED. Longman's strength is also in educational products and the company is currently building on Longman Logotron' brand (a separate company from Longman set up to produce their software) which is relatively new. Longman and BBC Multimedia have achieved their original commercial objectives to become well respected software publishers and this is a reputation they want their staff to build on and deliver. Brands must be strong to enable companies to get their message across externally, as well as internally. Within the sector, a globalisation of markets is occurring and publishers are having to market their brands effectively. Publishers have found that several different values exist within their brands, and depending on which country the company is positioning its product in, it would stress the asset that is most relevant to their target market. Overseas, the BBC

brand means integrity, trustworthy, newsworthy, whilst OUP represents quality, education and English for example. As publishers, the BBC and OUP bring all the required qualities to their products and take care to ensure the brand adds value and that is what people buy into.

5.3. Market strategy

Markets change as consumers demand different products or services, and as a result, may render some companies' offerings less attractive (Keys, 1997).

Changes in company culture and the development of brands can give companies some advantages in the multimedia market, however the research has found that companies are becoming increasingly closer to their market in the children's publishing industry. New media means new consumers. Markets and technologies are constantly evolving. Publishers are therefore having to make more of an effort and react to the changing market. A preliminary analysis has found that publishers are communicating with their market in various ways; through supportive focus groups; clearly defined drivers for purchase; improved customer service techniques and improved relationships with the retail market.

5.3.1. A new market

'Multimedia publishing is always driven by market interest and position,'
(Lyne, 1999)

Children's publishers in the multimedia market are finding they have to do more than maintain and update a knowledge of what consumers require. Publishers producing multimedia for children are also keeping abreast of Local Education Authorities' and National Curriculum priorities, European Commission and governmental initiatives, such as increased IT funding in schools, and continually identify trends and develop strategies to make the most of these effects. For example, Logotron is producing software in collaboration with the Family Numeracy Framework that is being launched in September 1999, where schools will encourage families to use school software at home over a period of time. The companies studied have positioned themselves in a way which will enable them to compete in distinct, identifiable and strategically relevant markets. Publishing areas are being analysed separately for multimedia production by publishers, for example in OUP, where the children's department specialises on different areas such as primary school products.

5.3.2. Focus Groups

Conventional publishers entering the multimedia market do not have the knowledge of the multimedia consumer that they may have for consumers of their traditional publishing output. Using focus groups is a valuable way of identifying customer needs, key product attributes and problems with products. Publishers need to identify where their competitive advantage lies, analyse what they can do with it, work out concepts, product propositions and then test those on focus groups to find out whether

or not people would buy in to them. Longman test their products on groups of teachers and children in a classroom environment and receive additional feedback from Local Educational Authorities (LEAs). Editors at OUP talk to teachers, educational psychologists on a one-to-one basis and also attend teachers' conferences to identify where the National Curriculum (NC) priorities lie (market requirements). The BBC have two types of focus group, firstly, a database of their consumers who return cards attached to their products. Secondly, they hire professional research companies who organise focus groups where people give feedback on what children's multimedia they want, need, and what certain brands mean to them for example. The company can then analyse the feedback and develop a product in response.

5.3.3 Drivers for purchase

Two main drivers for purchase have been identified from the study of publishers producing children's multimedia. Publishers producing educational products use drivers described as 'parental' or 'educational/governmental/NC' drivers and for those publishers producing products for the home/consumer market, such as Live and Kicking or Blue Peter, the drivers would be 'parental/guilt support' or 'pester power' or 'playground word of mouth' drivers. *'Live & Kicking was driven on by pester power and playground word of mouth and likewise Top of The Pops was driven by the same sort of driver. It also depends on how you do your cross promotion in magazines etc. so that children actually see that the products are available.'* (Lee, 1999). Blue Peter is driven more by the 'parent/guilt support' factor, as many parents can associate with Blue Peter and appreciate its values. Publishers must learn to develop strategies which enable them to produce multimedia products containing elements relating to these market drivers.

5.3.4. Retail market

Multimedia publishing requires new ways of selling products and dealing with the challenges that new outlets bring. Some are still distributing their children's multimedia products to traditional outlets and now also to other retail outlets, such as music, computer electrical and toy stores, and even more recently, through online selling. *'Over 30% of the market is currently controlled by the Dixons Store Group for software and we hadn't sold through Dixons Store Group before because they don't sell videos, books and magazines.'* (Lee, 1999). The BBC now claim to have good relations with all their retail outlets, by proving themselves through quality and the fact that their product sales were healthy in these outlets. Publishers are beginning to shift their focus to e-commerce, but feel that there is firstly, a requirement to educate people and make them feel more comfortable with the security aspect of online purchasing.

5.4. Product Development

The research has analysed the product range and focus of some children's multimedia publishers. For all the companies studied, a common theme exists, in that their production of multimedia has been developed from their traditional base of mixed media kits and printed material for children and they all share similar product attributes.

5.4.1. Focus

All the publishers studied develop a range of products from books, audio visual and spoken word, through to CD-ROM. Publishers' concentration is currently on CD-ROM production, but all stated that they were increasing their focus in online publishing. In order to change successfully, the publishers studied felt that the shift in multimedia focus had to be gradual and would change only in response to a shift in the consumer's technology base. Therefore, the Internet is currently being used primarily to compliment, promote or sell existing CD-ROMs and books. OUP editor, Sharon Cooper states, *'It is building on our existing series, resources, adding value, i.e. providing artwork, teaching materials, question/answer sheets, activity sheets that teachers can print out.'* (Cooper, 1999)

The volatility of the multimedia market means that the threat of new or substitute products such as the Digital Versatile Disc (DVD), online and digital television, is a constant issue for children's publishers. The power of the software manufacturer has previously caused problematic situations, and indeed losses for publishers such as OUP and BBC in the multimedia market. Due to the nature of the market, many manufacturers in the 1990s have stopped trading, changed ownership, or merged with other companies. These problems have been overcome by publishers developing relationships with established manufacturers or by approaching manufacturers recommended by a reliable source. Large publishers with multimedia operations are taking advantage of their assets and resources and are developing and producing digital products already. BBC Multimedia is the only publisher in the study who is developing their digital assets, noting that a digital model allows them to extend in both directions - both from and to television. They also emphasise the importance of building in a hybrid element in their products, *'If the concentration is on offline activity, this must now always be with a link to the online part of the operation.'* (Lee, 1999). Smaller, conventional children's publishers are waiting a few years before they start DVD production although they are currently identifying opportunities and formulating strategies for this (incorporating their 'lessons learnt' from CD-ROM development).

5.4.2. Assets

Publishers are identifying and focusing on maximising the value of their products. The experience of publishers in the multimedia market has pointed them to the significance of building certain features into their products. *'Don't assume your best-selling book will be a best-selling CD-ROM.'* (Lee, 1999). It was found that certain attributes are common to children's multimedia products, such as being part of a series publication, having established brands, reputable writers or illustrators, good content, potential for character building, hardware compatibility and effective usability. Certain attributes are also common to children's multimedia products produced for the home/consumer market such as a high visual content, activity based and a magical/imagination element. Denise Lyne at Longman Logotron commented on their products, *'When publishing for Early Learning, the skill is teaching without making it obvious that the user is engaged in a learning exercise. As the child gets older, it becomes harder because they become suspicious and look for games rather than education.'* (Lyne, 1999). Some attributes are common to products published for the schools/education market such as core National Curriculum content and explanations of the National Curriculum tie-ins, annual updates, being English in bias as opposed to American (therefore more saleable in UK, for example OUP's children's encyclopaedia on CD-ROM), good content and design, and an educational/logic element.

5.4.3. Added value & complimentary role

Publishers are recognising that the multimedia product's complimentary role should be the focus of new media at the moment and all multimedia should be adding value to their book products. Longman see their books as complimenting their software products, OUP views their multimedia as complimenting their books, and the BBC's products are viewed as, *'extending and enhancing the experiences offered by BBC books, programmes, services and characters. I think when we talk about strategic threat, it stems back to the market that we first joined, where there was a belief by traditional book publishers that new media would replace old media and we said from day one that it never would - it would compliment it.'* (Lee, 1999)

5.4.4. Rights

The cost of investment in multimedia is much higher than print, therefore publishers are finding that they must increase their international market focus, in order to gain a greater return on their investment. Publishers in the children's multimedia market are creating new value and revenue by licensing content, selling rights to other publishers, exploiting their rights holdings to hardware companies and toy companies in the UK and are dealing increasingly with international rights sales.

5.5. Company structure

'The ideal organisation of the future will be flat, non-hierarchical, knowledge-based and flexible, with highly skilled employees. It will be essentially project-based and innovation will be encouraged.' (Peters and Waterman, 1982).

Publishers have developed new organising paradigms for the production of multimedia for children. These new paradigms include leaner, more flexible structures, with information and decision making roles being pushed down to lower levels, decentralised teams and business units accountable for specific products, services or customers, and participative management and teamwork. BBC Multimedia and Longman Logotron have taken an ambidextrous approach, setting up separate operations to carry out their multimedia production with a small group of core staff working on projects and subcontracting in other skills as and when necessary. However, OUP, having initially taken a similar approach, has now moved all production from a stand alone electronic publishing division back into specialist divisions.

5.6. Key functions

The change process is characterised by considerable innovation and learning and continues almost indefinitely as employees discover new ways of improving the organisation and adapting to its conditions. Children's publishers are identifying, focusing and investing in key functions and skills for the multimedia market. There have been increases, decreases and redefinition of roles within various departments of the publishing companies studied. In the majority of departments change was either incremental and staff were brought in from within the companies or externally, or completely new divisions were set up with a new team.

For children's multimedia production, management has typically shifted to lower levels, new leadership skills have been required for change, staff with educational, magazine publishing and computing backgrounds and 'innovatives' from production houses have been brought in. The editorial function for multimedia is quite similar to books, enabling publishers to exploit their core skills from book publishing, such as *'selection, finance, organisation aggregation and marketing'*. (Vista Publishing). The editorial side of multimedia is still very much a sieving role, trying to find unique, quality products and then identifying how to build a value-added experience. OUP felt, *'commissioning, is much more about market analysis - looking at the assets that exist and trying to match that with that marketing brief'* for multimedia. (Cooper, 1999). Publishers noted that the largest staff increases have been required within product development. New functions and roles were set up at the BBC such as interactive production and in Longman a new department was created.

Publishers also value creative staff highly in the children's multimedia production process and increases in this department were notable. Innovative and creative ideas are encouraged by the publishers studied by motivating staff, and giving them a degree of autonomy and responsibility. However, publishers warned that these ideas must be realistic in terms of production times, the technology available and the install base requirements. There is also a lot more time spent at this stage now putting creative ideas on hold while rights are cleared.

Within technical support, jobs have been redefined and departments restructured to cope with the workload for new projects. Publishers are finding communication could be improved particularly between the technical staff and most other departments. The publishers studied are generally encouraging all their staff to talk to each other at sub meetings, brand meetings and liaisons, bringing departments together to try to resolve their differences, enabling deadlines to be met more efficiently. With new products and new customers, publishers are ensuring customer service is a priority. Effective customer support lines/emails have been set up to deal with problems customers have regarding products. Publishers felt outsourcing a mix of functions, such as software manufacturing, development and testing, is a wise option, as apart from anything else, companies can buy in innovation, and new techniques, and more flexibility.

5.7. Key skills

'Early attention must be given to the requirement of new skills involved in the operation of new structures and systems'. (Pettigrew and Whipp, 1993).

Skills publishers have recognised as being particularly beneficial in the production of multimedia for children include innovative and creative, interactive production, rights and talent acquisition, brand management and commissioning skills. There are certain skills lacking for children's multimedia products, series or projects, therefore publishers need to work out where the benefit lies - in either, employing and training new staff or outsourcing functions required for the job in hand. Outsourcing or in-house training with external assistance, has often proved the best approach. BBC Multimedia's Technical Development Director, Gerry Clark stated, *'We're in it for the marathon, not for the sprint. We've got a vested interest in developing skills in new media ready for a world where interactive media is at the forefront.'* (Clark, 1998). IT skills shortages are no longer the main problem for publishers in the sector. The main concern, currently, is the investment required in improving the industry's image and poor salaries. Learning to develop skills transfer is an important technique in itself for the multimedia market if publishers wish to exploit core skills from book publishing or from other operations such as digital production.

5.8. Training

'An improved level of professional education and training in the area of electronic publishing is urgently required. The skills shortage in the area of electronic publishing is the most immediate, and most potentially damaging issue facing the sector.' (Williams, 1998).

The importance of the multimedia industry and the need to identify publishers' training needs has been supported by the European Commission's LEONARDO programme. (Birn and Richardson, 1997). Publishers who have entered the market are demonstrating a commitment to change and give positive help to employees to adapt to new values, roles and systems. The BBC found that because they were recruiting so many *'interactive gurus'* there was a lot of knowledge internally for training. Publishers recommend investing in training from day one as, if the multimedia

division is strong from the start, the company's chances of becoming established, respected and able to produce quality products should increase. In-house appraisal and reward systems are being reviewed to ensure that the employees' perceptions of what is important reinforce the targeted new cultural characteristics within the changing environment. Longman Logotron acknowledges the feedback they receive from annual attitude surveys as valuable indicators of the rate of success, and of aspects to which more emphasis may need to be given.

6. Conclusion

On the basis of this project's preliminary findings, the children's multimedia publishing companies studied in the UK appear to be buoyant. Despite being forced to confront rapid, and confusing, technical change and serious competitive challenges, the findings suggest that these publishers are in an expansive, experimental phase. There is currently a decisive shift taking place to develop new multimedia products, to generate new revenue streams from these products, and to exploit the potential of the Internet. The publishers studied have undergone changes in reaction to the evolving multimedia market. These changes have been implemented through the formulation of new or altered strategies which also prepare the companies for further change. They are placing themselves in a position which will enable them to compete in distinct, identifiable, and strategically relevant markets. Promotion of organisational learning, innovation and creativity within the companies appear to be the key to success.

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