AI: Threats and Opportunities for Publishers

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George Walkley
Outside Context Ltd

Introductions—George Walkley

—Independent strategy consultant, Chair at Midas Group, NED at Burleigh Dodds Science Publishing, policy advisor at IPG, weekly newsletter on AI and publishing

—Book trade since 1997, digital transformation experience, Hachette UK, 2005-2020

—Asked to develop AI training by IPG following 2023 member survey

—First independent, CPD-accredited training on Generative AI for book publishers

—Based on research with technology companies, investors, and publishing businesses, and now delivered to delegates from more than 270 organisations worldwide

—Aggregate perspective on AI transformation and how publishing is using AI, and pragmatic focus

—Fifteen observations from the last two and a half years…

Framing the Discussion

1. **Define Publishing**

   — IPG: 600+ members working across trade, children's, academic, professional, educational and specialist publishing

   — Commonality of books and journals, but significant variation across sub-sectors (and structural differences from other areas of publishing such as news and magazines)

2. **Define AI**

   — Broad range of applications from automation to generation, but discourse dominated by LLMs and other generative models

3. **Define Activity**

   — Licensing content for training data or retrieval and display

   — Use of AI for productivity within publishers

   — Use of AI for content creation and as part of core product

   — Individual use within publishing ecosystem

The Technology Environment

4. **Pace of change**

   — Capabilities: multimodality, reasoning models, Deep Research, MCP

   — AI embedded across publishing software stack (Microsoft Office, Google Workspace, Adobe Creative Suite, GitHub, specialist apps)

5. **"Jagged frontier" of performance**

   — PhD-level knowledge and sub intern-level performance

   — Hallucination remains an issue, especially at scale (Apple, Fable), human-in-the-loop essential for publishing use cases

6. **"Capability overhang"**

   — Many capabilities, use cases and limitations only emerge through use

   — Experimentation not documentation

Concerns

7. **Copyright**

   — Recent US legal findings on Fair Use, political environment

   — UK direction of travel

   — New York Times as pragmatic strategy: litigating but using tools

   — Collective licensing as potential solution

8. **Scraping**

   — Impact of web scraping on online publishers (Wikimedia, BMJ, MIT), particular Open Access

   — Emergent technology solutions: consensual (CC Signals), prescriptive (Cloudflare)

9. **Environmental Impact**

   — Hard to quantify across training, infrastructure, usage

   — Recent revisionist estimates from Andy Masley, Sam Altman

   — But if impact is modest, why lack of transparency?

People and Perceptions

10. Stakeholder concern

— June 2025 *Bookseller* survey: only 18% "optimistic", 58% concerned (compare with Poyecto451: 54% "positive/very positive", 20% "negative")

— This week: Lithub open letter

— Partly reflects issues, but also lack of positive case studies/one-sided discourse

11. Transparency matters

— What do romance authors Lena McDonald and KC Crowne, Springer's *Advanced Nano-Vaccines for Cancer Immunotherapy* and 700 journal articles have in common?

— Good examples of policy statements: John Wiley, David & Charles

12. Academic publishing further ahead than trade

— Full range of activity: licensing, productivity, product: https://coda.io/@helen-king/ai-powered-publishing-use-cases

— Structural factors: digital maturity, channel strategy, territorial rights, contracts

Impacts

13. Publisher benefits

— Most finding benefits—average 5% productivity improvement (University of Lausanne: 2 hours 45 minutes)

— Framing: AI as hand not brain, tasks not roles

— AI as assistive technology/reasonable adjustment

— Zero to One use cases—ancillary content, multilingual and multiformat

14. Whatever publishers do, our readers are using AI

—CLA: 82% of UK professionals using third party content in prompts

—Kortext/HEPI: 36% of students using AI for explanation, summary, translation, format shifting…

15. It's still Day One…

Thank You, Questions

—Training: 9 July—a few places available

—Quarterly IPG update: 8 October

—Free weekly newsletter:
www.georgewalkley.com/newsletter

—Questions afterwards:
hello@outsidecontext.co.uk, or www.linkedin.com/in/georgewalkley