Anticipatory Skills for Adapting the Publishing Sector

References

R2.6 MAPPING OF COMPETENCES; SKILLS NEEDS ASSESSMENT AND ANALYSIS OF THE COMPETENCES GAPS IN THE UK

WP2 DEFINING SECTOR SKILL SHORTAGES/NEEDS AND ECVET STRATEGY

ASAP
MAIL

ASAP
SOCIAL NETWORK

ASAP
WEBTV

ASAP
MOOC

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EXECUTIVE SUMMARY

This report will map the publishing sector potential and skill shortages in the UK and underline how the UK (the most proactive country in facing the challenges) has adapted to the changes. It will also categorize the professional profiles using the EQF framework in preparation for the application of the ECVET framework in the next work package.

It will follow the same structure as the other national reports:

(1) Overview of current trends and challenges for the publishing sector

(2) Current skills needs

(3) National education and training provisions

(4) Future forecasts

"Digital publishing is not a serious revenue driver for children's publishing—so it is not a huge focus. But the changes in technology have given us access to so much more data that we can use to run a better, more efficient company—which we must be able to harness." *– Survey respondent.*

1. OVERVIEW OF CURRENT TRENDS AND CHALLENGES FOR THE PUBLISHING SECTOR

The UK publishing sector has undergone phenomenal and rapid change in recent years. Firstly, it has seen rapid growth. In 2017, the sales of books and journals reached £5.1 billion–their highest level ever recorded. Digital sales also substantially increased by 6% to £1.7 billion (35% of total revenues), reflecting the significant investment publishers are making in new technology[1].

Secondly, this unprecedented growth – particularly in digital products and services – has created an upshot of demand for much-needed digital skills. This is true elsewhere across the UK economy. In June 2016, a House of Commons report declared "a digital skills crisis" in the UK, calling for urgent action to prevent it from impacting the nation's productivity and

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[1] *PA Publishing Yearbook 2016*, Publishers Association, 26 April 2017.

economic competitiveness[2]. More recently, a survey of over 1,400 businesses across the UK by the British Chambers of Commerce found that 84% of companies described digital and IT skills as important to their business but 76% reported a shortage of them in their workforce[3].

There are unfortunately few studies or data sets that focus specifically on the skills needs of the book publishing sector. However, there are a number that encompass the whole of the creative industries, from which one can draw analogies. Current challenges to the creative industries include long-standing skills shortages stemming from inadequate training provisions in school education and a high demand for talent. The latter is evident in the Government's Migration Tier 2 Shortage Occupation List, which highlights the need for design and technical skills[4].

2. CURRENT SKILLS NEEDS

To assess the current skills needs of the UK publishing labour market, a needs assessment survey was distributed to a large sample of stakeholders (with a response of 100) across the production supply chain, including publishers, professional training providers and service providers. This is the first of its kind to assess the digital skills gap in the UK book and journal publishing industry. Other data sets cover the creative industries as a whole or include magazines and newspapers in their definition of publishing.

WHAT SKILLS ARE MISSING FROM THE SURVEY?

"Motivating others (internal and external)"
"Driving for results"
"Strategic thinking "
"Knowledge of policy environment - needed within educational & STM publishing"
"Reference management and use of software for this"
"New product development process and creative iterative development"
"Layout/typesetting: Moderately, Middle, N/A"
"Creativity"
"Analysing customer needs"
"Crisis management in PR, more relevant with social media. Flexibility. Speed to market."
"Leadership"
"Project management skills - often "new" ideas or innovations become small projects. Important to hire candidates who can cope with day to day work, whilst assessing change requirements and managing projects to implement change."
"The ability to innovate and test ideas quickly. Ability to manage risk effectively."
"Logistics and stock control - a key component of managing cashflow within any publishing business, and a really specialist skill. SEO - a very distinct skillset beyond just metadata and online marketing. I would also split out PR from marketing as a separate distinct skill."

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[2] *Digital Skills Crisis: Second Report of the Session 2016–17*, House of Co[...] Committee), published on 13 June 2016, p. 3:
https://publications.parliament.uk/pa/cm201617/cmselect/cmsctech/270/270.pdf.
[3] *Workforce Survey 2017: Skills Shortages*, British Chambers of Commerce, published on 13 September 2017: http://www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/bcc-workforce-survey-2017-skills-shortages.html.
[4] "Immigration Rules", Home Office, published on 29 February 2016, last updated 10 August 2017: https://www.gov.uk/guidance/immigration-rules/immigration-rules-appendix-k-shortage-occupation-list.

The survey was conducted in Summer 2017. Working collaboratively with industry partners, a cross-sector approach was taken with an emphasis on maximising the response across senior staff responsible for hiring decisions and located in human resources departments. Employers from the targeted sector were asked to evaluate a set of competences for each professional profile using three criteria: the degree of its importance to their company's core operations; the career stage at which this competence is expected to be achieved; and the extent to which it is present in their workforce.

The competences were divided by professional profile: Digital and print production; design; editorial; sales, marketing and publicity; rights management; data management; legal knowledge; and interpersonal. The result was a comprehensive list of competences. Respondents were asked if any skills were missing from the survey; 13 replied in the affirmative, listing highly specialised skills (like the use of reference management software) or variations on listed competences (e.g. leadership).

Of the respondents, 81% were publishers, 14% were service providers and 4% were professional training providers. There was a roughly even representation across the different sectors with 39% publishing consumer books, 38% publishing children's, 42% publishing educational and 34% publishing STM. Of those publishing books, 84% published digital and 16% did not. Most of the respondents published more than 50 titles a year (58%). Of the remainder, 30% published up to 50 titles and 12% did not publish any.

Executive Summary

Figure 1 What skills are missing?

Respondents were asked to describe the extent to which each competence was lacking in their company's workforce as "Not at all", "Somewhat", "Moderately", "Mostly" or "Completely". More than half of noted that competences in digital production, sales, marketing and publicity were moderately to completely lacking in their workforce.

Averages for extent to which competence is lacking in respondent's company
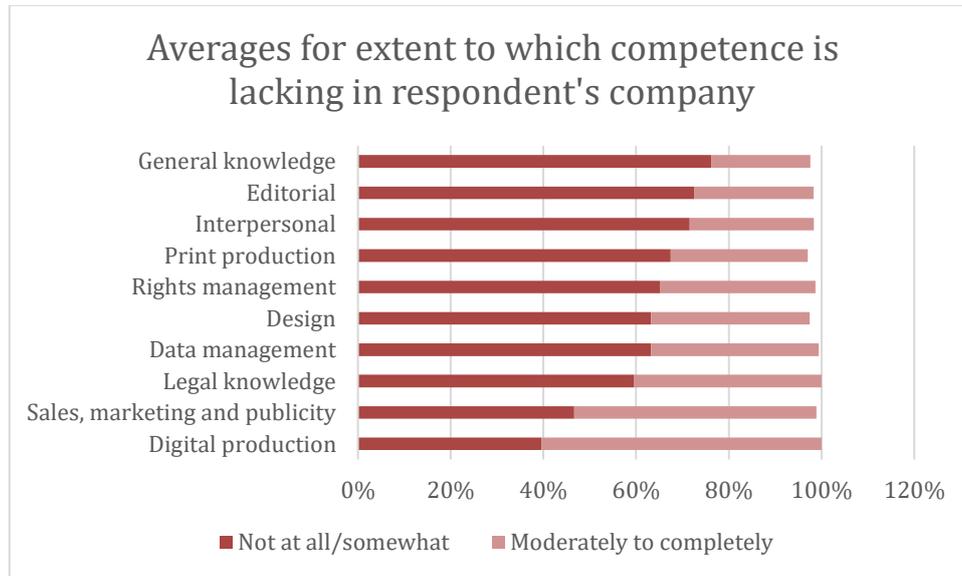
Figure 2 Averages for extent to which competences are lacking in each company.

A quarter said that they were not at all or only partially covered by existing publishing training with half (49%) describing them as covered to at least "a certain extent". Nearly all (97%) said that they had changed due to the shift to digital.

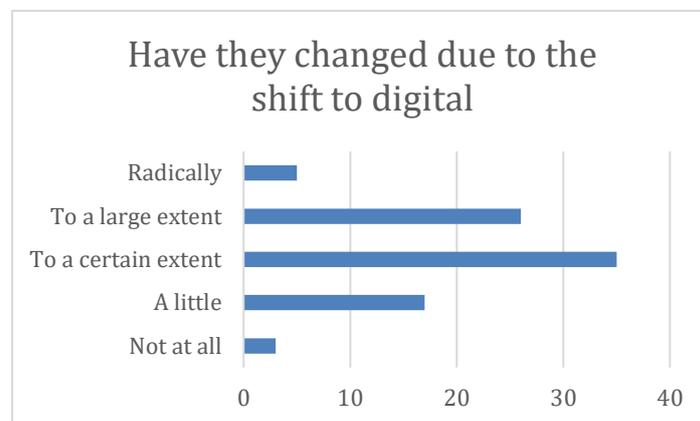## Have they changed due to the shift to digital

Figure 3 Have they changed due to the shift to digital?

The majority of respondents (74%) had both hired new personnel and re-qualified existing personnel with a significant proportion mostly hiring new people (20%). Nearly half (45%) had experienced difficulties in hiring or re-qualifying personnel primarily due to a lack of qualified candidates. According to respondents, other issues included a lack of enthusiasm for the professional profile and trouble with finding enough applicants for the role. At least half (52%) had increased their level of outsourcing due to the shift to digital due to the satisfactory supply of services from third parties (53%), because it was too hard and costly

to internalise new tasks and skills (33%) and because new tasks and skills are now beyond their core activity (18%).

Most respondents recruit through open job vacancies (76%), specialist agencies (66%) and the higher education sector (49%) with only some recruiting from the vocational education and training sector (15%). A small proportion noted "Other" (20%) indicating that personal networks and word of mouth were also a key recruitment tactic.

Most publishers (79%) look for requalification opportunities internally with many turning to the higher education sector (25%) and vocational education and training sector (39%), citing the Publishing Training Centre, Society for Editors and Proofreaders, Certitec, Publishing Research Consortium, and the Association of Learned & Professional Society Publishers.

Digital and Print Production

Production involves the use of technical skills to produce a finished product and can be specific to digital or print processes, often combining the two. Competence in print production includes knowledge of production and printing techniques and technology, quality, safety and environmental standards and costing whereas competence in digital production involves publishing software and other digital processes. While print production has long been a staple profile of the publishing house, digital teams have grown in response to growing demand for digital products.

Of the respondents, most (78-79%) said that competence in digital production was "fully", "almost fully" or at least "moderately" lacking in their workforce, compared to the 28-40% who answered the same for print. This is particularly striking given that 73-79% of respondents consider competence in digital production either essential or very important to their company's core activities. Of those who reported that digital skills where both important to their business and lacking in their current workforce, 47% felt that the professional profiles had changed significantly due to the shift to digital. Of these, most had experienced difficulties in hiring and re-qualifying personnel, overwhelming citing a lack of qualified candidates.

Design

Design includes planning the overall look and feel of a publication, in particular ensuring a consistent design style for different markets and cultures and using specialised publishing and design software. 61-80% said design competence were essential or very important to their company's core activities. The majority (58-69%) felt that design competence was not

at all or only somewhat lacking in their workforce. This seems to indicate that the professional profile for design, which has almost completely shifted to digital in the last few years, is sufficiently present in the workforce to meet the needs of the publishing sector.

Editorial

Editorial is deciding and overseeing the style and scope of the content that will be produced in addition to researching, writing and checking content. Competences include: commissioning; editing; relationships with authors; market, distribution circuit and client management; typography and pagination; images and illustrations.

The majority of respondents (61-95%) said that editorial competences were "essential" or "very" important to their business and over half (58-88%) felt that they were "not at all" or only "somewhat" lacking in their workforce. This seems to suggest that while the editorial profile–much like design–has been irrevocably changed by the digital revolution, it has adapted well.

Sales, Marketing and Publicity Skills

Sales, marketing and publicity is the overseeing all the commercial aspects, including: trade partnership management; market, trend and distribution circuit knowledge; marketing/sales strategies and techniques; communication and promotion techniques; social media, influencers and interacting with the reader; e-commerce and digital sales strategy. The digital revolution has created demand for consumer-facing content, which in turn has meant a shift to online and digital marketing and selling.

A majority of respondents (76-91%) said that competence in sales, marketing and publicity was either "essential" or "very" important to their core business but there were variable assessments of the individual competences (Figure 1). On average, half (47%) stated that these competences were not at all or only somewhat lacking and half (52%) states that they were moderately to completely lacking. According to the results, it appears that traditional sales, marketing and publicity

"I work in marketing so it's difficult to generalise, but we certainly could do with more technology/digital expertise within the company. Within marketing, more people with commercial experience and especially experience in data management/tracking campaigns."
– Survey Respondent.

competences (such as trade partnership agreements) are more present in publishers' workforces than those, such as e-commerce and digital sales strategies, that have been affected by the digital revolution.

Figure 4 Averages for sales, marketing and publicity competences

Rights Management

Rights management involves licensing copyright, handling digital rights and managing deal structures and rights management with authors. Most respondents (81-88%) said that these competences were essential or very important to their core business activities. The range between the different competences for those answering moderately to completely lacking is significant (57-72%). Like the sales, marketing and publicity profile, the averages for rights management competences (Figure 2) are tiered – new skills (e.g. digital rights) are apparently lacking more than traditional ones (e.g. licensing copyright).
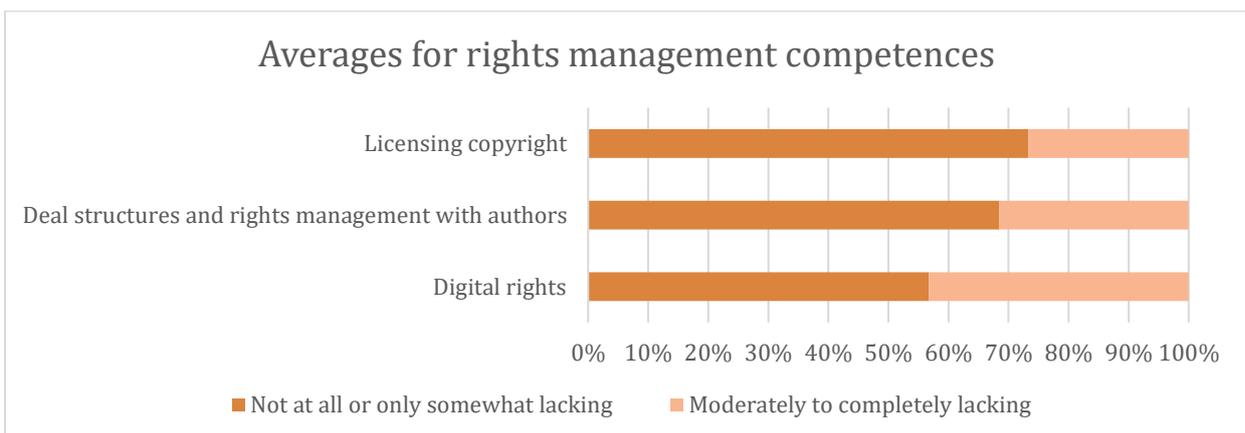
Figure 5 Averages for rights management competences

Data Management

Data management includes metadata, market and sales data. A significant majority of respondents (83-86%) said that these competences were essential or very important to their business.

Of these, most answered that data management competences were somewhat or moderately lacking in their workforce (Figure 3).
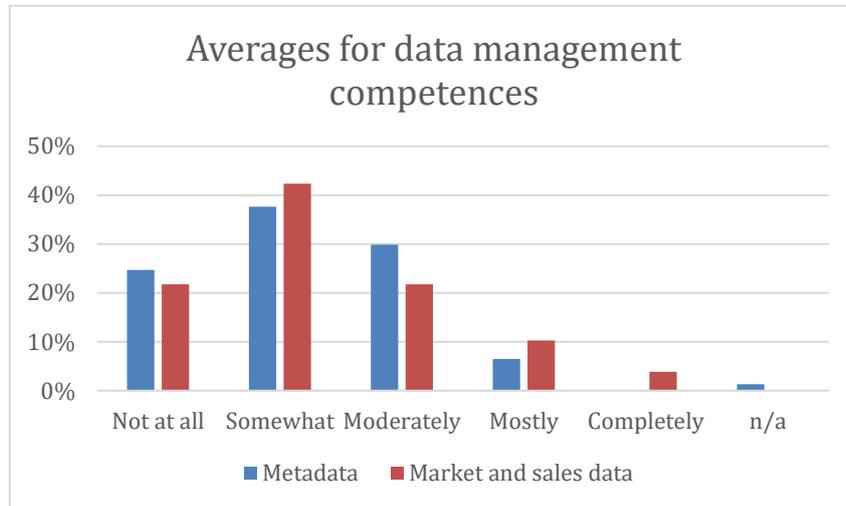
Figure 6 Averages for data management competences

Legal Knowledge

In publishing, legal knowledge includes copyright law, contract law, and an understanding of the UK/EU elements of commercial, labour and contract law. A steep majority of respondents (80-92%) said that legal knowledge was moderately important to essential to their company's core activities. However, responses seemed to indicate that competences in this profile are significantly lacking with most participants (76-79%) describing them as moderately to completely lacking from their workforce. This could be because, as one respondent described: "Digital has brought in new legal implications, and also requires more specialised knowledge of software."

Interpersonal skills

Interpersonal skills include: stakeholder management; clear communication; public and interpersonal relations; commercial negotiation; language skills; specialised English skills; critical reading and comprehension; office management; administration, management and human resources; working independently; problem solving; and team work. Of all the professional profiles, this one had the greatest sense of consensus on the various competences (Figure 4). Evidently, regardless of the digital revolution, interpersonal competences are as important as every to the daily operations of a publisher.
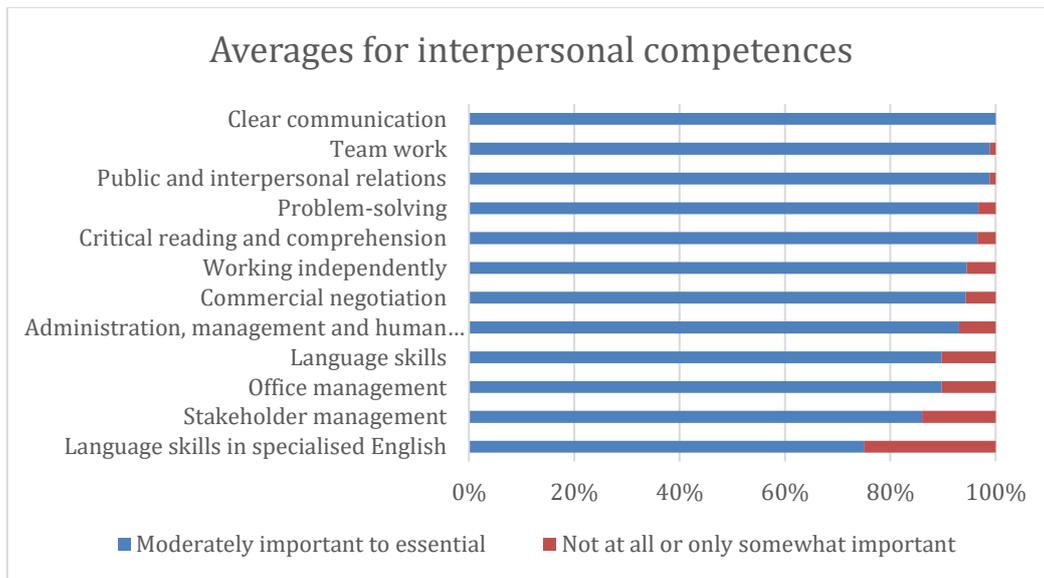
Figure 7 Averages for interpersonal competences

3. NATIONAL EDUCATION AND TRAINING PROVISIONS

Many of the aforementioned publishing profiles are typically filled by graduates, although there are opportunities for some with A-levels or equivalent qualifications.

There are a range of full- and part-time postgraduate courses that focus on publishing and other specialist aspects (such as digital publishing). According to UCAS (an independent charity providing advice to facilitate educational progression), there are 397 publishing courses in the UK of which 161 are undergraduate and 237 postgraduate[5]. The skills body for the creative industries (Creative Skillset) accredits a few of these through its Creative Skills Tick scheme[6]. Some larger publishers (such as Penguin Random House) offer a small number of places on graduate training programmes.

There are also a number of degree and foundation degree courses in publishing and related subjects. Those working in specialist subject areas, such as music, educational or scientific publishing, may opt for a relevant degree.

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[5] "Search – UCAS", UCAS, 2017:
https://digital.ucas.com/search/results?SearchText=Publishing&filters=Destination_Undergraduate&ProviderText=&SubjectText=&AutoSuggestType=&SearchType=searchbarbutton.
[6] "Creative Courses", Creative Skillset, 2017: http://creativeskillset.org/creative_courses.

The Publishers Association has worked closely with an industry advisory group to roll out an standard for a publishing assistant apprenticeship[7]. As an advanced apprenticeship (level 3), its completion is equivalent to 2 A-level passes. Applicants must have 5 GCSOs or more, or have completed an intermediate (level 2) apprenticeship. Specifications beyond this are the employers prerogative though likely they will remain inclusive to target non-graduates.

There are a number of specialist private providers of publishing training courses. These include the Publishing Training Centre (PTC), London School of Publishing (LSP) and Society for Editors and Proofreaders (SfEP). PTC offers short courses, self-study (distance learaning) and in-company programmes for editing, proofreading, copyright law and various courses related to digital and web publishing, typically for those already working in the industry. It will shortly offer elearning courses in addition. LSP offers short daytime and evening courses for a range of experience levels in areas such as editing and picture research. SfEP also offers short courses, some online, for beginners and those looking to improve existing skills.

4. FUTURE FORECASTS

The continued growth in demand for digital content and services will drive the expansion of the digital publishing sector: growth in technology demands; the growing important of cyber security; media and platform convergence; cloud computing; big data/analytics; and the development of new business models.

The publishing sector will continue to transform in the face of Brexit, accelerating technological change, and population ageing. Workers will require greater support to retrain and upskill or risk being left behind. This will need to be addressed by increasing the availability of high-quality specialist vocational provision.

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[7] "Apprenticeship standard: publishing assistant", Institute for Apprenticeships, published on 11 August 2017: https://www.gov.uk/government/publications/publishing-assistant.

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Workforce Survey 2017: Skills Shortages, British Chambers of Commerce, published on 13 September 2017: http://www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/bcc-workforce-survey-2017-skills-shortages.html.

ANNEX: CLASSIFICATION OF THE PUBLISHING PROFESSIONAL PROFILES UNDER THE EQF FRAMEWORK

Descriptors defining levels in the European Qualifications Framework (EQF): Each of the 8 levels is defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications.

In the context of EQF, knowledge is described as *theoretical and/or factual* and skills are described as *cognitive* (involving the use of logical, intuitive and creative thinking) and *practical* (involving manual dexterity and the use of methods, materials, tools and instruments). Competence is described in terms of *responsibility and autonomy*. Respondents were asked at what career stage a competence was necessary; the below table links career stage with equivalent EQG level.

Table 1 Correlation between career stage and EQF level.

Career stage	EQF Level	Knowledge	Skills	Competence
Entry level	Level 1	Basic general knowledge	Basic skills required to carry out simple tasks	Work or study under direct supervision in a structured context
Entry level	Level 2	Basic factual knowledge of a field of work or study	Basic cognitive and practical skills required to use relevant information in order to carry out tasks and to solve routine problems using simple rules and tools	Work or study under supervision with some autonomy
Entry level	Level 3	Knowledge of facts, principles, processes and general concepts, in a field of work or study	A range of cognitive and practical skills required to accomplish tasks and solve problems by selecting and applying basic methods, tools, materials and information	Take responsibility for completion of tasks in work or study; adapt own behaviour to circumstances in solving problems
Transition from entry to middle	Level 4	Factual and theoretical knowledge in broad contexts within a field of work or study	A range of cognitive and practical skills required to generate solutions to specific problems in a field of work or study	Exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change; supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities

Middle	Level 5	Comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge	A comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems	Exercise management and supervision in contexts of work or study activities where there is unpredictable change; review and develop performance of self and others
Middle	Level 6	Advanced knowledge of a field of work or study, involving a critical understanding of theories and principles	Advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study	Manage complex technical or professional activities or projects, taking responsibility for decision-making in unpredictable work or study contexts; take responsibility for managing professional development of individuals and groups
Transition from middle to advanced	Level 7	Highly specialised knowledge, some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking and/or research Critical awareness of knowledge issues in a field and at the interface between different fields	Specialised problem-solving skills required in research and/or innovation in order to develop new knowledge and procedures and to integrate knowledge from different fields	Manage and transform work or study contexts that are complex, unpredictable and require new strategic approaches; take responsibility for contributing to professional knowledge and practice and/or for reviewing the strategic performance of teams
Advanced	Level 8	Knowledge at the most advanced frontier of a field of work or study and at the interface between fields	The most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in research and/or innovation and to extend and redefine existing knowledge or professional practice	Demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or study contexts including research

Table 2 Classification of professional profiles by EQF level; also broken down by competences.

Profile	Career stage	EQF Level	Competence	Career stage	EQF Level
Data management	Transition from entry to middle	Level 4	Market and sales data	Transition from middle to advanced	Level 7
			Metadata	Transition from entry to middle	Level 4

Design	Transition from entry to middle	Level 4	Consistent design style for different markets and cultures	Middle	Level 5-6
			Specialised publishing and design software	Entry level	Level 1-3
Digital production	Transition from entry to middle	Level 4	Digital production processes	Transition from entry to middle	Level 4
			Publishing software	Entry level	Level 1-3
Editorial	Transition from entry to middle	Level 4	Commissioning	Middle	Level 5-6
			Editing	Transition from entry to middle	Level 4
			Images and illustrations	Transition from entry to middle	Level 4
			Market, distribution circuit and client management	Transition from middle to advanced	Level 7
			Relationships with authors	Transition from entry to middle	Level 4
			Typography and pagination	Transition from entry to middle	Level 4
General knowledge	Transition from entry to middle	Level 4	The range of publishing sectors, formats and genres	Transition from entry to middle	Level 4
			The supply chain	Transition from entry to middle	Level 4
Interpersonal skills	Entry level	Level 1-3	Administration, management and human resources	Transition from middle to advanced	Level 7
			Clear communication	Entry level	Level 1-3
			Commercial negotiation	Transition from middle to advanced	Level 7
			Critical reading and comprehension	Entry level	Level 1-3
			Language skills	Entry level	Level 1-3
			Language skills in specialised English	Middle	Level 5-6
			Office management	Middle	Level 5-6
			Problem-solving	Entry level	Level 1-3
			Public and interpersonal relations	Entry level	Level 1-3
			Stakeholder management	Transition from middle to advanced	Level 7
			Team work	Entry level	Level 1-3
			Working independently	Entry level	Level 1-3
Legal knowledge	Transition from middle to advanced	Level 7	Copyright law and copyright contract law	Middle	Level 5-6
			UK/EU elements of commercial, labour and contract law	Transition from middle to advanced	Level 7

Print production	Transition from entry to middle	Level 4	Costing	Middle	Level 5-6
			Production and printing techniques and technology	Transition from entry to middle	Level 4
			Quality, safety and environmental standards	Middle	Level 5-6
Rights management	Transition from entry to middle	Level 4	Deal structures and rights management with authors	Transition from entry to middle	Level 4
			Digital rights	Middle/Transition from entry to middle	Level 4
			Licensing copyright	Transition from entry to middle	Level 4
Sales, marketing and publicity	Transition from entry to middle	Level 4	Communication and promotion techniques	Transition from entry to middle	Level 4
			E-commerce and digital sales strategy	Middle	Level 5-6
			Market, trend and distribution circuit knowledge	Middle	Level 5-6
			Marketing strategies and techniques	Transition from entry to middle	Level 4
			Sales strategies and techniques	Transition from entry to middle	Level 4
			Social media, influencers and interacting with readers	Transition from entry to middle	Level 4
			Trade partnership management	Transition from entry to middle	Level 4