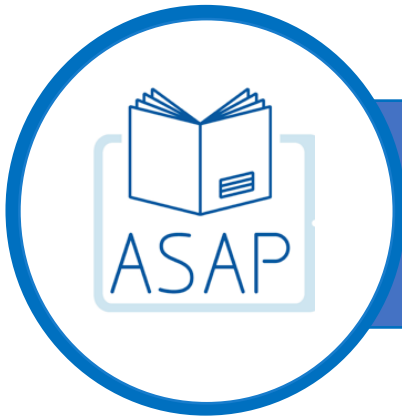




Co-funded by the
Erasmus+ Programme
of the European Union



Anticipatory Skills for Adapting the Publishing Sector

References

Agreement 2016-2992/001-001
Project n. 575884-EPP-1-2016-
1-IT-EPPKA2-SSA

R2.8 MAPPING OF COMPETENCES; SKILLS NEEDS ASSESSMENT AND ANALYSIS OF THE COMPETENCES GAPS IN TWO ADITIONAL REPRESENTATIVE EU COUNTRIES

WP2 DEFINING SECTOR SKILL SHORTAGES/NEEDS AND ECVET STRATEGY



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Project information

Project acronym:	ASAP
Project title:	Anticipatory Skills for Adapting the Publishing Sector
Agreement number:	2016 – 2992 / 001 – 001
Sub-programme or KA:	KA2 Sector Skills Alliances
Project website:	http://www.erasmus-asap.eu
Authoring partner:	Federation of European Publishers
Version:	4.0 (final)
Date of preparation:	02.11.2017

Document history

Date	Version	Author(s)	Description
29.08.2017	1.0	Enrico Turrin	Interviews and first notes Germany
05.10.2017	1.1	Enrico Turrin	Interviews and first notes France
13.09.2017	2.0	Enrico Turrin	First draft Germany
17.10.2017	2.1	Enrico Turrin	First draft France
18.10.2017	3.0	Enrico Turrin	Editing both reports
02.11.2017	4.0	Enrico Turrin	Final formatting

With the support of the Erasmus+ Programme of the European Union.

The European Commission support for the production of this publication does not constitute endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



R2.8 Skills needs assessment and analysis of competence gaps in two additional representative EU countries

Introduction

The Federation of European Publishers, due to its position of representative of the great majority of publishers in Europe, was tasked with carrying out the mapping of competences and skills gap analysis in two additional EU countries (besides those participating in the project) in relation to their representativeness for the aim of the ASAP Project.

The countries selected and analysed were France and Germany, chosen as advanced models for benchmarking due to their sophisticated and comprehensive training and education systems. The reports were based rather on interviews with experts than on questionnaires – of which a few were collected anyway.

Just like the other national reports (deliverables R2.4 to R2.7), the present ones look at current and future trends in the publishing sector, while focusing mostly on skills needs and the landscape of national education and training provisions.



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National report France

The French panorama with regard to the training opportunities for jobs in the publishing sector is quite sophisticated. Several specific courses and schools exist that can prepare or requalify people for working in the publishing sector, especially for certain specific profiles, at different levels of qualification. The training and studies available range from Master's courses in Book and publishing professions or in Multimedia publishing and professional editing, to Professional bachelor degrees in Editorial techniques and practices applied to publishing, to University diplomas of technology (DUT) in Information communication, option Book and heritage professions, or Diplomas in Scientific and technical university studies (DEUTS) in Library and documentation professions.

Besides the specialised courses, several other education and training paths can allow starting a career in publishing: Master's in Information and documentation, Master's in Arts and culture, Master's in Humanities, Master's in Economics, in Marketing, in Business administration, Technician certificate (BTS) in Graphic design option Communication and print media, and many more, based also on the type of profiles targeted.

Higher education in France comprises three cycles: an initial cycle of three years (but technical diplomas like DUT, DEUST and BTS can be obtained in two years) that lead to gaining a Bachelor's degree; a second two-year cycle (only accessible after a degree) that leads to obtaining a Master's; and a third cycle of three years, the doctoral training.

Some profiles require higher qualifications than others; managerial and directorial positions, and most editorial profiles, are usually accessed after a Master's degree, whereas design, production or proofreading positions are normally open to holders of Bachelor's degrees or University diplomas. Of course, positions entailing significant responsibilities normally require a number of years of experience; experience can also in some cases be a substitute for a higher level of educational qualification. Broadly speaking, most often applicants wanting to work in publishing have completed 4 or 5 years of higher education.

The French system also foresees the possibility of dual education, which combines apprenticeships in companies and (mostly) vocational education, at all levels: vocational education and training centres offer dual systems to students aged 16 to 25, which can lead to higher education degrees such as BTS, DUT, Professional bachelor degrees and Professional master's degrees. Many different models are used for the alternation of work and study.

Quite interestingly, the French Publishers Association (SNE), in cooperation with the Joint National Committee for Employment (CPNE) in Publishing, carried out a mapping of the professional profiles in book publishing. The mapping, updated in 2017, identifies and describes in a series of professional sheets the 8 main sectors of book publishing – editorial, artistic, marketing, commercial/sales, production, communication/promotion, distribution, supporting functions – and their main professional profiles (35 in total), specifying their main



features, activities and objectives, competences required and possible training paths to prepare them, as well as potential related career paths (in annex the mapping, and an English summary table).

The skills and competences identified in the ASAP survey show significant parallels with those described in the professional sheets emanating from the representatives of the French publishing sector. Indeed, the competences of the survey cover very well the range of essential elements sought after by publishers in hiring their personnel. If anything, all kinds of legislative issues are quite relevant for French publishers (those affecting the sector, obviously) – copyright first and foremost but others as well – and are quite relevant for many profiles, not only those in the legal department.

People looking for employment in a publishing house must first of all understand well the publishing process – this applies to basically all sectors, except maybe the artistic one. Good understanding of the market is increasingly a relevant competence, as are relational skills, communication, and coordination abilities (internal and external). Competences related with the integration of digital in all production stages are of course essential, especially in publishing houses that produce digital books (but not only): these include a wide range of programs and applications for computer assisted production, such as software for layout and design.

In this framework, the SNE has established a certificate of professional qualification of digital publisher, for people already working who want to enhance their digital competences in relation to publishing industry profiles; 3 institutions currently deliver the courses, which formed 80 people in 2 years, some of which went on to create a start-up offering digital services to publishers.

The main skills and competences required are sometimes more relevant at an entry level and sometimes can be acquired on the job, often there being some degree of both aspects for the same element. In-job training is very common; in particular, there is an obligation in France to train workers to adapt to their workplace. Moreover, most trainings now need to be certified, and funds for professional training are created to reimburse workers for the training in most categories.

Besides those already mentioned, publishers are also searching more and more for profiles with an economics background: people with knowledge of cost-performance, resources management, budget, some elements or overview of business administration competences (at least project management, administrative and financial management). Particularly sought after are people with a double relevant education (for example, a Master's in publishing on top of a Bachelor's degree in business administration).

Publishers traditionally hired people with the appropriate training qualifications; recently, however, more and more they introduce new personnel through traineeships, often taking



advantage of the opportunities of the dual education system. Frequently this involves in fact students that start working during their studies; many higher education institutions offer this opportunity with placement in the publishing industry, and there are a number of vocational training institutions focused on publishing. A typical career path these days comprises an apprenticeship, followed by an internship, a determined duration contract and eventually an indefinite duration contract. Traineeships constitute the most common form of in-job training, but as mentioned before continuous professional requalification is very important, and it is carried out both in-house and in external institutions.

For sectors like marketing and communication, in which to some extent the specific knowledge of publishing might not be essential (at least initially), more and more people are being hired from other sectors, especially profiles with a technical education (such as digital marketing), or professionals from sectors where digital is more pervasive. In the past, mobility used to be more intra-sectorial.

While all in all it is not too difficult for publishers to find personnel, there are differences depending on the specific sectors: if on one hand there is a lot of demand for certain areas – possibly an excess in cases like editorial and communication – there are some difficulties for example in production, mainly due to the lack of qualified personnel (applicants often have undertaken training but not at a sufficient level).

Undoubtedly digitisation has had an impact on French publishers, including with regard to their professional profiles and hiring and training practices. The changes, however, seem to have taken rather the form of a gradual adaptation, rather than an overhaul. Initially, the focus was on the integration of digital in the jobs and tasks that required it; the panorama is still evolving, though, and for some publishers is now easier to hire people already formed with digital skills.

The adaptation has relied (and still does) on training and requalification of their personnel, and in turn many start-ups have been created that offer services to publishers covering emerging competences. Some publishers have started from scratch, doing only digital publications. In any case, the overall impact has not been dramatic. Publishers looking for requalification opportunities work a lot with in-house mechanisms and can also find external providers; the SNE – in compliance with a general law obligation for category associations – publishes lists of training offers, which count many vocational training institutions.

All in all, between specialised courses in higher education institutions and vocational training entities, there is no lack of opportunities for preparing/requalifying people for work in publishing. These opportunities cover by and large the competences identified as relevant, with the possible exception of competences in production and linguistic skills (namely English) – though it might be just that offers exist but they are not well known, despite the publicity. In addition, not all new aspects of digital are fully covered yet: there is room for improvement, for example, in the fields of data management and the related legal aspects.



The difficulties encountered by publishers in requalifying their personnel basically related just to resource constraints: it can be complicated, especially for small publishers, to train people, because of limitations with time and money.

The digital transition has also affected the level of outsourcing in publishing; the profiles mostly affected – besides the digital services taken up by new specialised companies – are in the artistic and proofreading sectors.



National report Germany

The situation in Germany with regard to the training opportunities for jobs in the publishing sector is quite special, due to the country's dual VET system. Generally speaking, students in Germany can, after middle school, enter a VET programme, which will allow them to get a job as skilled labour or assistants; these 2-3 years of vocational training can be complemented with a so-called "bachelor professional" degree (level 6 in the European Qualification Framework) of usually 1.5 years, which gives access to more qualified jobs (at managerial level) or to an academic path (to obtain a bachelor degree). Students with a high school diploma can enter university directly to get a bachelor degree. After a bachelor degree, students can do a 1-1.5-year traineeship in a company in order to get a job there, or keep studying to obtain a Master's and a PhD.

The special character of the dual VET system lies in the fact that junior employees receive training from both a company – which imparts mainly practical know-how – and a part-time vocational school – which teaches mainly theory. However, both elements have to be activity-oriented, so firms also teach theory and schools also teach practice-oriented exercises. Such VET programmes usually last 2.5-3 years; the school activities normally take up two days a week.

The owner of a firm decides whether the company will provide in-house initial vocational training, the occupations they will provide training in and how many youths the firm will take on for in-house initial vocational training. Trainers are responsible for planning training content and schedules and for conducting in-company vocational training programmes. They must pass a trainer aptitude examination.

The whole system is highly regulated. The national VET regulation (Verordnung über die Berufsausbildung) defines the legal conditions and schedule of vocational education and training: job profile of the recognised trade, duration, skills and level of knowledge, requirements of the final exams. The VET curriculum (Ausbildungsrahmenplan) is part of the VET regulations; it defines the learning objectives and level of knowledge to be taught, as well as the timeframe of the vocational training. It is the basis for the in-house course of instruction. Finally, the framework curriculum (Rahmenlehrplan) is the syllabus for the vocational school establishing the teaching and learning content and objectives.

In addition, the Vocational Training Act defines the requirements and conditions for vocational training that is provided on an in-company basis. It establishes: the content of a training contract; requirements regarding the suitability of a firm providing in-house vocational training and of trainers; a firm's obligation to pay trainees; the rights and duties of firms providing in-house vocational training and of persons receiving training; the process of conducting examinations; a trainee's right to a certificate from the company providing training upon completion of the training; the competent body's organisation and monitoring of in-company vocational training.



The VET system is based on a series of standardised job profiles, regularly drafted or amended jointly by all parties involved in professional education: corporations and chambers (employers), unions (employees), the regional governments and the central government.

The job profile 'Managing Assistant in Publishing' is one of the trades recognised in the system. The VET programme lasts some 3 years and during their traineeship, participants will pass through all publishing departments, getting accustomed to the respective workflows, most likely going on working in programme and product development, marketing, sales and distribution or in the production department.

The curriculum of the course for managing assistants is as varied as the requirements in a publishing house; trainees acquire specialised knowledge of all workflows in a publishing house, as well as the industry's characteristics, including: history and trends of the publishing industry; market players and processes; copyright laws and book sector regulations; managing projects, using the appropriate techniques of presentation; development of products and services; communication strategies, sales and distribution channels; knowledge of the various types of publishing houses; optimising purchases of material and external services; market research and marketing strategies; basic knowledge in business administration, finance and controlling; basics in human resources; basic knowledge of economic policy in a social market economy.

In the years 2015-2017, some 730-750 people have enrolled in traineeships as Managing Assistants in Publishing every year. After the VET programme, students take a final test with the Chamber of Commerce. They can then start working or enhance their training, through an extra-occupational bachelor programme or through a bachelor professional degree; or they can go to university.

For people interested in publishing, Mediacampus (see below) offers an extra-occupational bachelor programme in Publishing and Media Management, comprising 2 study courses: publishing and media management and book trade and media management. Studies last 3 years and they are organised in independent studies – with transcript preparation for seminars, presentations and case studies – and contact studies – lectures and seminars on campuses. The knowledge acquired by the students is transferred to the companies via seminar papers and the B.A. thesis. The curriculum includes courses in Business Administration (general business administration, economics, project management, business management, marketing, human resources management, economic and employment law, cash management, cost-performance calculation, accounting and controlling, business arithmetic, self-management) and in Media Management (media and communication theory, media markets and media strategies, online marketing, media innovation and international media management, media analysis and strategy), and advanced courses of business administration for publishing houses, finance and controlling for publishing houses, product- and project management, rights and licences, digital and print production, as well as



integration courses of future scenarios for the publishing industry, market research, public relations, literature, presentation and communication.

A bachelor professional is also available in Media Marketing and Distribution, a broad non-academic education programme targeting those seeking a practice-oriented qualification programme in order to pursue a higher career level. The nationally standardised curriculum focuses on practicality and activity orientation; the programme lasts 18 months and includes a trainer aptitude diploma: alumni are qualified to teach trainees. The curriculum comprises economics qualifications (economics and business administration, accounting, law and taxes, corporate management) and professional qualifications (media industries and their market potential, legal and operational conditions, target group-relevant sales and distribution, management and cooperation). After a final exam and a trainer aptitude test, students obtain their diploma.

A comparison of the skills and competences identified in the ASAP survey and those included in the curricula of training programmes for the publishing sector in Germany broadly confirms the relevance of the items highlighted in the questionnaire. Industry specific know-how and general publishing knowledge are needed in particular by service providers, often companies more focused on IT than on publishing, which therefore more often lack such skills. Generally speaking, competences in the sales area are especially requested; data management is also increasingly important: with the shift to a customer-oriented workflow, it is paramount to be able to learn from data that one is already collecting. All of this goes hand in hand with the increasing digitisation.

Whether certain skills are needed at entry level or can be developed in-job often depends on the size of a publisher. Soft skills are usually acquired on the job (some only become necessary at later stages), and many companies request in-house training on these, especially on customer relations. Change management is another soft skill very much sought after. With a traineeship, applicants obtain skills – including publishing-specific – already at entry level; for those who go to university and then enter a publishing house, it depends on the publishing house. The need for legal knowledge depends primarily on where a person works; those hired in legal departments usually already have specialist training, although this can be very time-dependent: legal department staff can need new training when new relevant legislation is adopted. What skills are already available to publishers in-house depends on several factors, including the age of their personnel: some small publishers have younger staff, thus generally able to adapt to digital more easily; on the other hand, these people may lack more traditional, job-specific skills.

Publishers – again, depending on the size of the company – need all the profiles identified in the framework of the project. Editorial jobs are always needed; however, recently the need has increased especially for people to work in marketing, sales and communication. German publishing houses look for personnel mostly among university graduates; for jobs in the



editorial department, the most popular aspiration for people with a university degree, publishers can usually select candidates with a Master's degree. Other profiles can be filled by people with non-academic training, and VET is a common source for certain positions. Traineeships are considered very useful; companies need trainees a lot.

All in all, in-job training is the norm in publishing in Germany; several course providers exist (such as Mediacampus, an educational centre for the publishing sector that is a subsidiary of the German Publishers and Booksellers Association) and a lot of training is also provided on the job (just as in many other industries in Germany). A few big publishers have their own academies or training centres, offering several programmes. Training centres offer also in-house training for their customers, depending on the size of the publishing houses, and tailor-made seminars on specific topics.

As a result, it is generally not difficult for German publishers to hire qualified personnel; moreover, many people who wish to work in publishing are especially committed (again, especially in the editorial department). There can be some difficulties with finding rights management and sales experts, as these areas are quite complex and very specific. For generic job descriptions – such as profiles in human resources, administration, public relations – which are commonly found in other industries, publishers naturally have to compete with the other sectors, and salaries become more relevant; this is especially evident in hiring IT people, in which case publishers suffer from strong competition from big companies, in particular technology giants.

Digitisation is widely recognised as driving force for change in the publishing sector in recent years, also from the point of view of skills and competences and the dynamics of human resources. Traditional companies need to check their profiles, products and workflows to assess the need for adaptations. One important new paradigm is the shift to a customer-centric approach, in a scenario of evolving readers' expectations; moreover, workflows become increasingly non-linear. In moving to a digital catalogue, publishers may thus need an overhaul, or at least an integration of their skills pool, as new competences become necessary.

In general, the changes entail rather the introduction of ICT elements in existing job profiles rather than the emergence of totally new profiles (but there are exceptions). Job applicants in most cases will need digital skills in order to make serious candidates. The main skills now in demand due to the digital transition concern multichannel distribution and communication: social media, platforms, file conversion, XML – all depending on the department. In editorial, such skills may not be so directly relevant, but people in the department will still have to at least understand what other departments need. Other important new competences involve data management, and knowledge and understanding of customer and target groups in the new environment.



In this framework, publishing houses find themselves in a wide range of different situations: some need very limited change and/or have already accomplished it – often helped by younger workforces that adapt more easily – while others do not need to change, and still others have not undergone the necessary changes yet. Once again, the size of a publishing house is very important in determining these dynamics.

In any case, many publishers are looking into requalifying their personnel; a number of them went to digital natives at first, but the need for skills works both ways: IT people need to know the industry, and people in the industry need IT skills. As opportunities for requalification abound, and the competences identified as relevant are covered by the existing training opportunities, the only real difficulties for publishers to train their workforce and update their skills regard the time and money needed for it: it is an investment, and many companies are understanding it.

The digital transition has also increased the level of outsourcing by German publishing houses: certain tasks, especially in the ICT field – such as file conversion and digital distribution – are covered by an increasing number of specialised service providers, as the levels of complexity and specialisation set those tasks too much apart from the core mission of publishing houses. Granted, the bigger a company, the more likely it is to try and build those services in-house; but for the huge number of small and medium publishers, which constitute the vast majority of the sector, this is usually out of reach. Several initiatives in Germany try therefore to match book sector companies and ICT start-ups – notably the Content Shift programme of the German Publishers and Booksellers Association, an accelerator programme for the content industry.