

Investing in the Future of Jobs and Skills. Scenarios, implications and options in anti-cipation of future skills and knowledge needs for the Printing and Publishing Sector.

Policy Summary

Publishing (the process of production and dissemination of information) and printing (the process of reproducing text and image) have traditionally been - and still are - closely related industries. Publishing includes various stages, from the development, acquisition, copy-editing, graphic design and other pre-press activities to the actual production (i.e. printing), marketing and distribution. Printing also includes associated support activities, such as bookbinding, plate-making services, and data imaging. ICTs and digitisation have not only led to the emergence of new media, but also to an important restructuring of the sector, with both publishers and printers diversifying product portfolios, introducing new business models, with substantial downstream integration and convergence of the different information and communications markets. Strong global competition has further strengthened this process. The sector accounts for about 217,000 firms (figures 2005), which together employed 1.91 million people, equivalent to 0.87% of overall EU employment. 854 thousand of these jobs were in publishing and 1,053 thousand in printing and recorded media of which 86%, respectively 82%, were located in the EU-15. EU employment in publishing grew with 0.3% annually during the period 2000-2006. In printing negative growth of -1.2% was observed, yet with strong annual growth in the new Member States (NMS) (5.6% against -2.3% in the EU-15). The workforce is dominated by medium-educated (47% in the EU-15 and 67% in NMS) and high-educated (28%). Low-educated have lost share considerably (minus 5% points). More than half of all employees is younger than 40 years, up to even 58% in the NMS. Sector strengths include high quality goods and services, flexible specialization in network structures, knowledge of how to target audiences, with new media and individualisation offering important opportunities to add services, create value, specialize and even better target specific audiences. Weaknesses include a limited absorptive capacity for innovation, lack of property rights protection and high investment costs for going online while keeping printed versions intact. Threats include cannibalization of distribution channels, even stronger competition, globally as well as from new media, vulnerability to relocation and piracy.

A number of recommendations apply in order to better prepare and anticipate future skills and knowledge needs in the sector. These include: 1) Foster and promote life-long learning; 2) Keep older workers in employment; 3) Enhance transparency of the quality of training, improve the trans-sectoral and trans-national recognition of vocational qualifications and provide for the possibility of an individual skills assessment; 4) Strengthen co-operation for sector-specific training measures; 5) Improve the image of the printing sector and attract more women to technical occupations; and 6) Promote entrepreneurship and a culture of innovation.

More flexible and apt education and training is indispensable in order to address the future needs of both employers (firms) and employees. The following recommendations specifically address education and training needs in the sector: 1) Adapt and modernise vocational education and training (VET) and general education systems, but do this nationally rather than at the EU level; 2) Enhance the flexibility in education and training by promoting modularisation; 3) Enhance flexibility in learning forms - e-learning and blended learning; 4) Promote the establishment of Joint Training Networks and Joint Training Facilities to keep knowledge and skills of workers up-to-date and to better foster apprenticeships in the sector; 5) Stimulate continuing vocational training: multi-skilling, re-training and up-skilling; 6) Arrange special training offers to freelance personnel; 7) Promote sector specific skills at an early stage - by renewing forms of education; 8) Foster inter- and multidisciplinary competences in education and training; 9) Stimulate image and awareness about the value and importance of continuing vocational training, especially among SMEs and micro-enterprises; 10) Stimulate co-operation between all stakeholders in order to improve the supply of information to trainers on (changes) in skills and knowledge needs in the sector and use up-to-date information to adapt existing courses; and 11) Career guidance for labour market entrants and employees.