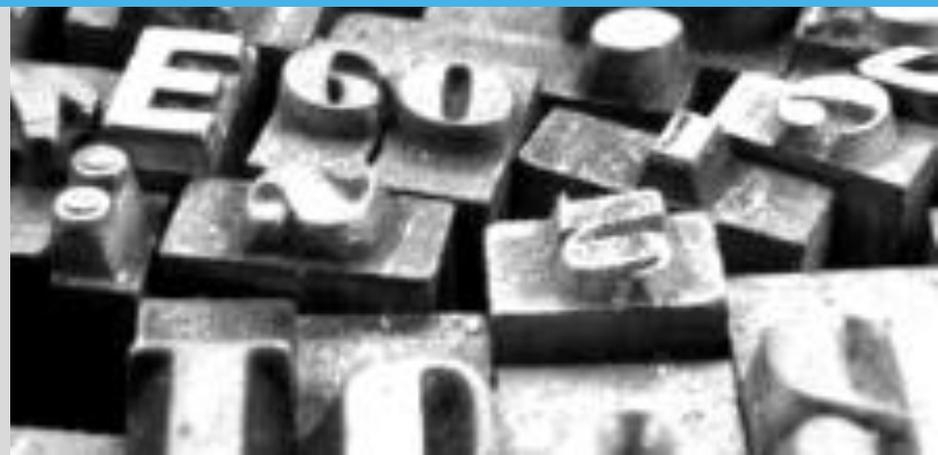


FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

Digital skills for book publishing: The ASAP project

*Enrico Turrin, Federation of European Publishers
ASAP-Live Skills Webinar, 26/03/2020*

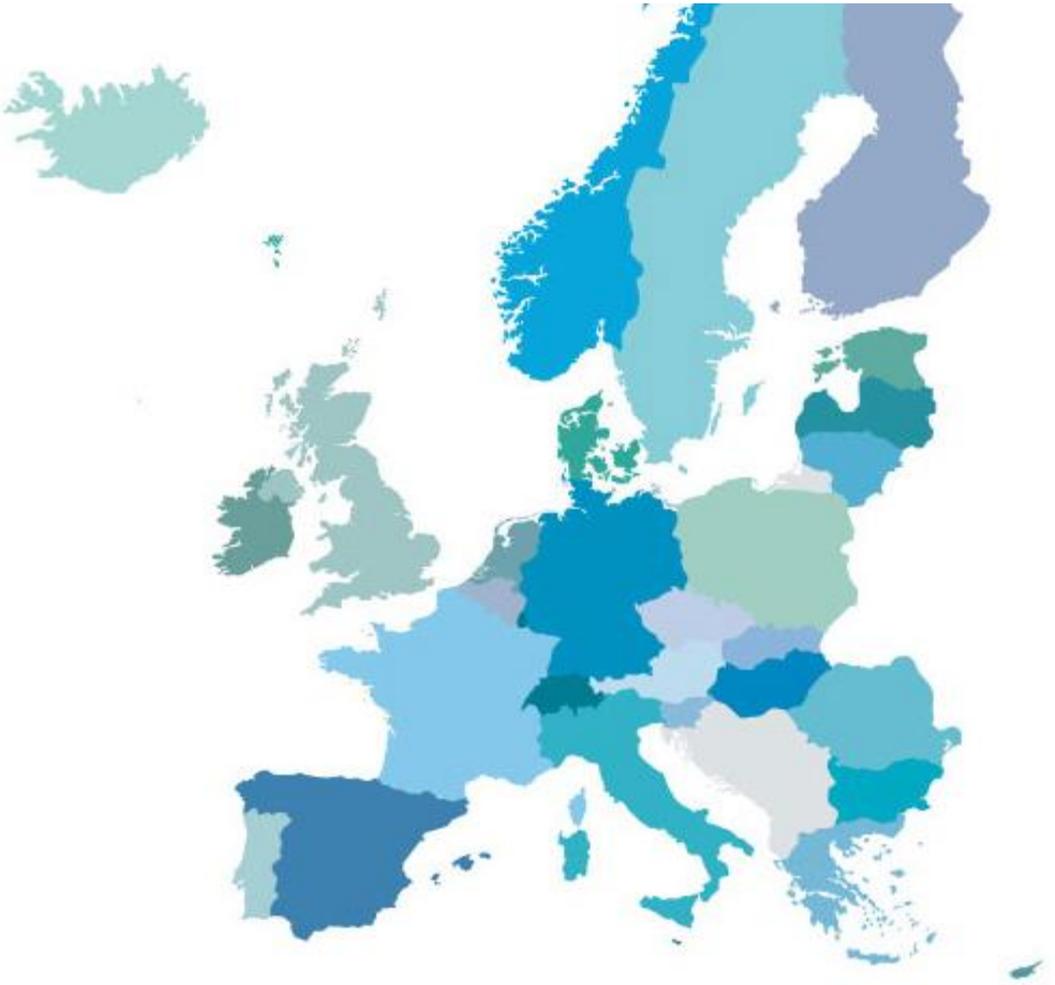


About FEP

Federation of European Publishers

Who we are

- Created in 1967
- 29 national publisher associations from 28 European countries
- 6,200+ publishers represented



ASAP – The evidence base

Work Package 2: Defining Sector Skill Shortages/Needs

Task 1 – State of the art: A) Analysis of the status quo and of the strategic perspectives with regard to the publishing sector; B) Analysis about how digital books are changing the reading and writing behaviours and how these changes impact on the publishing sector

Task 2 – Mapping of competences; Skills needs assessment and analysis of the competences gaps

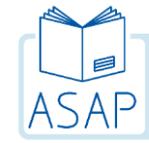
Check out the reports on <http://www.erasmus-asap.eu/results/>

Activities:

- Desk research
- Extensive survey via questionnaire (broad stakeholder base and focus group)
- Expert interviews
- Coverage: initial countries (Greece, Italy, Spain, UK) plus extra (France, Germany)

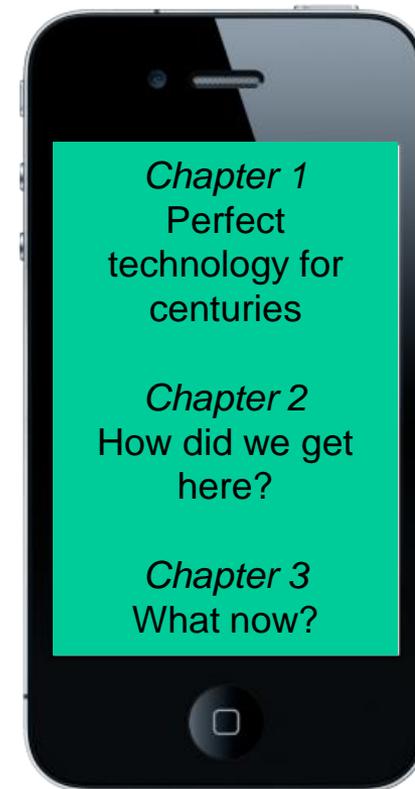
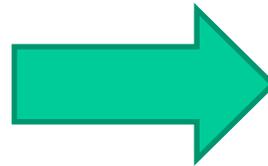
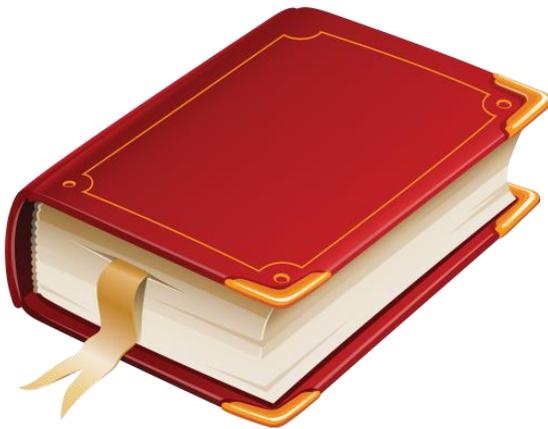


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The digital transition



The digital transition: Some history

1971

- A long, long time ago... the first e-book

2000

- Ready to take off

2002

- Crash landing

2007

- A new beginning

The digital transition: Evolution of the book market

Boom of sales

Technology and
innovation as drivers

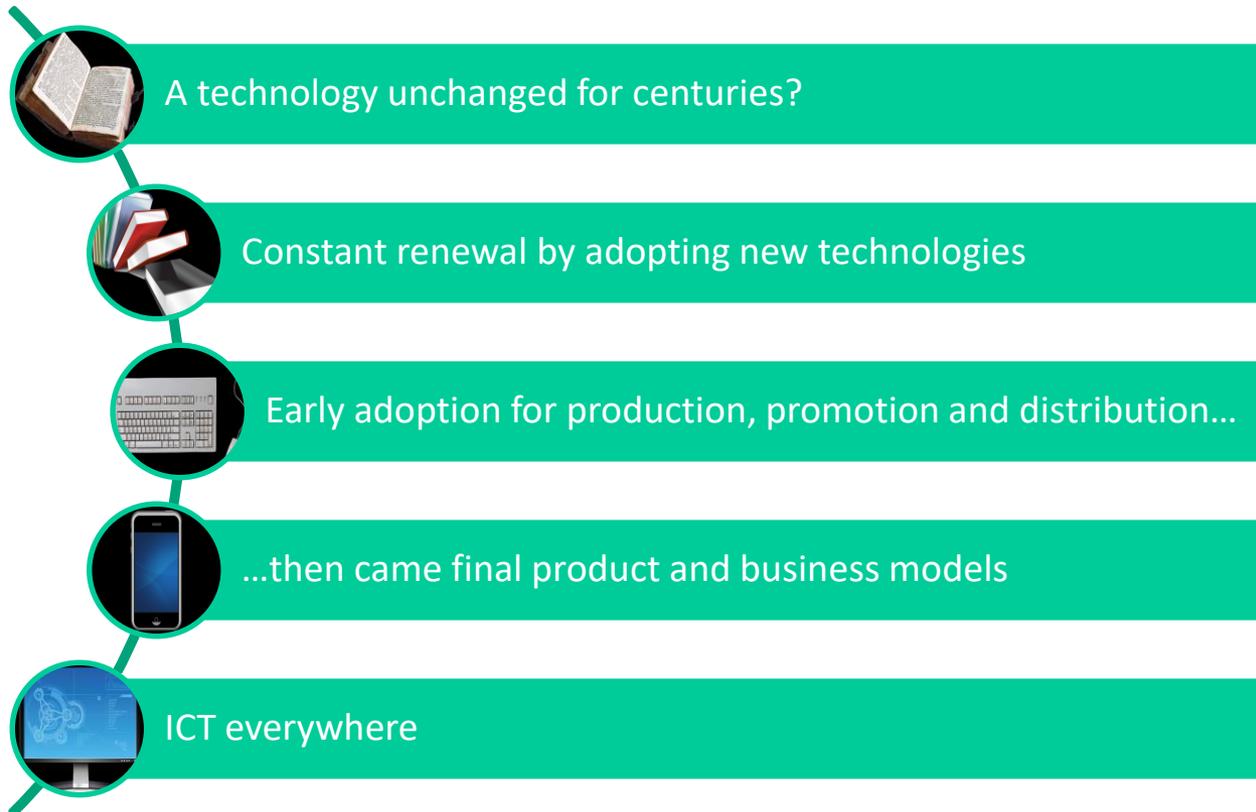
Technology trends:
devices uptake,
ebook availability,
internet penetration

Consumer
behaviours



Uneven transition
across sectors and
genres

The digital transition: Technology in publishing

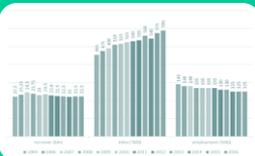


The digital transition: The ebook market now



The end of paper? Not yet...

- 2007-2020: ebooks have gone a long way, but...
- ...several dates passed for “end of paper”



Some data

- 7-8% of the book market in Europe (UK, US pioneers)
- Recently slowed down (maybe)



The end of ebooks? Neither

- Publishers fully engaged
- Sector differences



Trends

- Digital vs print sales
- Devices (e-readers out?)
- Retail concentration

Digital publishing: Role of publishers, value chains

Disintermediation vs re- intermediation

- Elimination of physical constraints
- New functions (production, distribution, business models...)
- Fragmentation of uses, multiple value chains

New kids on the block

- Traditional players evolve
- New players emerge (software producers, tech companies, pure internet players, etc.)

Permanence vs disruption

- Potential for disruption, but...
- ...essential roles are maintained (management & dissemination of content)

Digital publishing: Publishers in the digital age



New production processes

- Multiple formats
- Metadata



Innovation

- Products (enriched, enhanced, interactive...)
- Services (digital bookstores, search, personalisation...)
- Business models (sale, rental, subscriptions...)



The cost of ebooks

- Savings on physical (production, storage, distribution)
- All other costs remain, plus cost of digital
- All in all, maybe 10-20% cheaper?

Strategic outlook: Strategic drivers

Creation and
distribution of
value

Digital distribution
platforms

Technological
developments

Consumer
preferences

And more:
education, digital
natives, regulatory
frameworks

Strategic outlook: Challenges and opportunities

Price setting,
VAT, viability of
business models

Piracy,
willingness to
pay

Innovation,
direct link with
readers

Stock
management

DRM,
interoperability

Concentration in
retail

Content storage
and agility,
metadata

Data, data, data

Organisation,
competences

Self-publishing

Discoverability

Skills and employment: The impact of digitisation

Significant impact (no disruption)

- Surge in need for digital skills
- Customer-centric paradigm
- Change in workflows

Effects on recruitment

- Mostly requalifying of personnel
- External service providers, start-ups
- Increase in outsourcing (digital services, proofreading, artistry)

Changes in professional profiles

- Rather integration of digital in existing profiles
- Digital skills now essential in most positions

Skills and employment: The digital skills gap





Thank you!

