

SCARCE AND CRITICAL SKILLS IN THE PUBLISHING AND PRINT MEDIA SECTORS

Commissioned by
The Media, Advertising, Publishing, Printing and Packaging
(MAPPP) SETA

Research conducted by



HSRC

Human Sciences Research Council
October 2006

EXECUTIVE SUMMARY

As a statutory body, the MAPPP-SETA is responsible for the development of Sector Skills Plans. The current report gives a qualitative picture of the current scarce and critical skills in the Publishing and Print Media sub-sectors. Through a series of semi-structured focus group meetings and about 100 interviews in Gauteng, Western Cape, KwaZulu-Natal and the Eastern Cape, representatives of the sub-sectors were asked to provide their views on these issues and perceived training needs. Eleven occupations were investigated:

For the Publishing sub-sector:

- a. Managers of publishing houses, ranging from magazines to books, journals and professional publications
- b. Authors, technical writers
- c. Illustrators, graphic designers
- d. Editors, copy, readers, sub-editors, commissioning
- e. Marketing and sales managers, distributors, advertisers

For the Print Media sub-sector:

- a. Managers of printing workshops, industrial or linked to newspaper and magazine publishing companies
- b. Journalists and writers
- c. Editors
- d. Managers of graphic design studios
- e. Technical staff, production, unions
- f. Sales experts, marketing people

Publishing companies are highly differentiated in terms of size, products and staff components, ranging from Media24 with over 1000 staff members to small companies with fewer than ten staff members. The publishing sub-sector is strongly market driven, competitive, increasingly multi-cultural, and with a trend towards juniorisation, i.e. young managers and editors having to assume responsibilities that are usually allocated to experienced managers. Respondents generally agreed that the following critical attitudes and skills were important for an effective *manager*: an entrepreneurial and inquisitive attitude, high ethical standards, leadership and people-centredness, multi-cultural and financial management skills, knowledge of market trends and language proficiency. Many of these skills are transportable, and several respondents originated from other sectors. *Authors* seem to need skills related to language proficiency, research methodology, the creative construction of stories, ethical maturity and specialist knowledge about important areas, such as law, engineering, business and health. There is an increasing need in the sub-sector for people who can read and write African languages, which opens entry opportunities for previously disadvantaged individuals (PDIs) and a new generation of African writers. This also applies to *editors*, an occupation where there is a critical need for economic writing skills, language proficiency, sub-editing and quality management. *Illustrators and graphic designers* play an important role in visual communication, and the demand is for creativity, business sense and artistic skills, particularly in the specialist subject fields. The sector offers many opportunities for work, but competition among graduates from art schools is strong. *Marketing and sales people* are the key

distributors of publishing products. They need strong communication skills, an entrepreneurial flair and knowledge of the full production chain in order to sell the company to potential clients. In all cases computer technology is increasingly used, which has an impact on the skills needs, particularly in layout, graphic design and editing.

Training in the Publishing sub-sector takes mainly place through two channels: formal education, such as colleges and universities, and non-formal in-house and on-the-job training. Respondents agreed that in most occupations, and particularly management ones, a formal tertiary education is the best way to enter the industry. However, it is the application of theoretical knowledge in the practical worksituation that provides the necessary skills for a successful career.

Work in the Print Media companies seems to be similar to that in the large publishing companies, but increasingly with a stronger focus on once-off products and multi-media platforms for communication, e.g. newspapers, emails, SMS, and internet. *Managers* need passion, a good knowledge of their clients and the markets, and entrepreneurial aptitude and skills to ensure productivity is high and contracts and accounts come in. There seems to be an ongoing tension between writers/editors and the requirements from the owners of print media companies (particularly newspapers and tabloids). Print media is increasingly dependent on audio-visual media, and *graphic designers* are the creative core, with a need for creative skills for visualization of concepts, high IT experience and a good understanding of the production process up to the final product. Within print media companies, the *technical operators* play a main role, ranging from pre-press to press operators and finishers. Good technical operators are in high demand, and the image of the occupation is slowly changing from the dirty workshop to the IT based 'laboratory' environment. As in Publishing, the *marketing and sales people* are responsible for distribution, an increasingly professional job in a competitive market. They need passion, commitment and human interaction skills.

Similar to the situation in the Publishing sub-sector, formal education and training is important for entering the Print media sub-sector, particularly with the increasing focus on specialization and IT technology. However, respondents stressed that in-house training made the basic knowledge useful, and many careers had been made through the non-formal training trajectory from the bottom of the company to the top.

Small and Medium Enterprises (SME) are faced with daunting challenges in both sub-sectors. Managers and leaders have to be multi-skilled, while the companies are continuously faced with attrition to the larger companies, which offer better remuneration and career opportunities. Technically SMEs cannot compete with the larger companies over acquisition of expensive high-technology and advanced machines. SME's focus on niche markets or the lower end of the market.

Employment of people with disabilities is often determined by the nature of the disability. Machine operators have to be able to move around with ease, while field reporters and managers in SMEs need mobility. On the other hand, there are opportunities in the areas of writing, editing, creative design and internet-based journalism.

Respondents from both the Publishing and the Print media sub-sector emphasized the need for holistic training, in which theory and practice were continuously combined. Formal training institutions often have old equipment, and do not provide the advanced skills necessary for the job. Therefore, many respondents emphasized the need for learnerships, mentorship and internship after a specialist qualification was obtained.

The focus groups and interviews were conducted by the following organizations/individuals:

| | |
|----------------|--|
| Gauteng: | Umgangatho Media and Communications (Focus group interviews) |
| | René Smith Consultancy (Individual interviews) |
| KwaZulu-Natal: | Prodigy Consultancy |
| Western Cape: | Karen Thorne Consultancy; Thompson Research Services |
| Eastern Cape: | Chris Kabwato, Rhodes University |

Despite serious logistical and time constraints, these researchers delivered excellent results, which form the basis of this report.

Dr Gerard Hagg, Society, Culture and Identity Research Programme, HSRC
Project Manager

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1. Introduction and background

1.1 Introduction

This document reports on the findings of a qualitative investigation of scarce and critical skills in the publishing and print media sub-sectors, as part of a larger investigation into scarce and critical skills in the Media, Advertising, Publishing, Printing and Packaging (MAPPP) sector.

1.2 Background

The MAPPP-SETA has a statutory obligation to develop Sector Skills Plans. In order to prioritise strategic aims and objectives, there is a need to focus on scarce and critical skills, for which this investigation was commissioned. The information will be used to develop a skills plan and career information to inform prospective learners about occupations and careers in the sector.

1.3 Terms of Reference (ToR): Scarce and critical skills in the MAPPP Sector

The general Terms of Reference: *Scarce and critical skills in the MAPPP Sector* have been used as the basis for the investigation into the sub-sectors, particularly with regard to the Scope of Services and the methodology. The nine key occupations highlighted in the Terms of Reference have been extended and used for the selection of respondents and the structuring of this report

1.4 Existing research reports

The following reports have been used as background literature:

- 1.4.1 Publishing sub-sector sector skills update 2005/6 Draft (1), 19 Oct 2005
- 1.4.2 MAPPP-SETA Sector Skills Update 2005/2006, Final Draft, 30 Oct 2005
- 1.4.3 Printing, Publishing and Packaging Sector Study compiled by Amandla Consulting CC
- 1.4.4 SANEF Skills Audit Phase 2: Managerial competencies among first-line news managers in South Africa's mainstream media newsrooms, 2005, compiled by E Steyn, AS de Beer and TFJ Steyn

2 Aim of research

To provide a qualitative picture of the current scarce and critical skills by occupation in the Publishing and Print Media sub-sectors

3 Scope of Services

3.1 Primary outputs

As specified by the general Terms of Reference the investigation should deliver three primary outputs.

- 3.1.1 *Industry needs analysis:*
 - key occupations in the industry;
 - skills needs and gaps;
 - critical challenges that the sub-sectors face
- 3.1.2 *Scarce skills:*
 - identification of hard-to-fill vacancies;
 - changing skills profiles within a dynamic sectoral environment;
 - absorption rates with regard to new entrants into the occupation
 - scarce skills projections for the immediate to medium future
- 3.1.3 *Critical skills:*
 - essential skills required per occupation;
 - match between Education & Training and skills needs

3.2 Required information

The focus groups/interviews should provide information relating to the following:

- a. Description of occupation, which may have changed over the past years
- b. Outlook and future of the occupation, e.g. in view of transformation policies or technological innovations
- c. Career path potential for employees, including placements
- d. Spatial dimensions of employment possibilities
- e. Current employment environment and changing skills needs
- f. Recruitment issues and absorbing/induction of new staff
- g. Skills deficiencies including scarce and critical skills
- h. Education and training provision in relation to employment, including opportunities for employees who had in-service or informal training
- i. Future trends for the sector that may impact on the training requirements

3.3 Selection of respondents

Working per sub-sector, the contractor was expected to conduct focus groups with professionals, workers etc., in the occupations listed below and any others that will be identified and agreed upon on the recommendation of the contractor. The focus groups will be comprised of a maximum of 8-10 individuals, and will be held in at least three provinces around the country.

Factors such as race and gender must be factored into the formation of the groups to ensure an equitable spread. In addition, factors such as the differential skills needs of Small to Medium Enterprises (SMEs) and Black Economic Empowerment (BEE) companies must be explored.

4. Terms of reference

4.1 Scope of investigation

The scope of the investigation for the Publishing and Print Media sub-sectors followed the directives of the general Terms of Reference, as indicated in 3 above.

4.2 Selection of occupations

The following occupations were selected in consultation with the MAPPP-SETA.

4.2.1 Publishing sub-sector

- Managers of publishing houses, ranging from magazines to books, journals and professional publications
- Authors, technical writers
- Illustrators, graphic designers
- Editors, copy, readers, sub-editors, commissioning
- Marketing and sales managers, distributors, advertisers

4.2.2 Print Media sub-sector

- Managers of printing workshops, industrial or linked to publishing companies
- Writers and journalists
- News editors
- Managers of graphic design studios (attached to larger publishing houses and BEE emergent companies)
- Technical staff, production, unions
- Sales experts, marketing people

Annexure A provides a table of respondents that were interviewed during the investigation.

4.3 Geographical areas

It was agreed with MAPPP-SETA that the main bulk of the investigation would take place in the Western Cape, KwaZulu-Natal, Gauteng, and some work in the Eastern Cape. From the databases, it is clear that over 90% of all leading companies have their head offices and main workplaces in these four provinces. It was also assumed that smaller companies in the other provinces will most likely operate in similar ways as the smaller ones in the above four provinces. The focus on the four provinces would also make the investigation manageable within the time and financial constraints.

5 Consultancy and sub-contracting

5.1 Human Sciences Research Council (HSRC)

The Human Sciences Research Council was commissioned to conduct the research, with an understanding that most of the actual focus groups and interviews would be conducted through experienced sub-contractors. Dr Gerard Hagg was project manager and responsible for the report.

5.2 Sub-contractors

The following sub-contractors were appointed:

| | |
|----------------|--|
| Gauteng: | Umgangatho Media and Communications (Focus group interviews) René Smith Consultancy (Individual interviews) |
| KwaZulu-Natal: | Prodigy Consultancy |
| Western Cape: | Karen Thorne Consultancy; Thompson Research Services |
| Eastern Cape: | Chris Kabwato, Rhodes University |

The need for sub-contracting was indicated in the Service Level Agreement between MAPPP-SETA and the HSRC. The selection and contracting took into account the need for affirmative action and professional capacity of the sub-contractor.

6 Methodology

6.1 Focus on qualitative research

In view of the time constraints, all interviews and focus group discussions would be focused on qualitative research. Follow-up investigations may provide opportunities for quantitative work, particularly if linked to previous research in the sectors.

6.2 Issues that need to be addressed in focus groups and interviews

During the focus groups and interviews the issues as identified in 3.2 were discussed, taking into account specific respondents and circumstances

6.3 Question schedule

A question schedule was drafted, which guided the focus group discussions and interviews. It is attached as Annexure B to this report.

6.4 Introductory letter from MAPPP-SETA

The MAPPP-SETA supplied an introductory letter for inclusion into all invitations to companies for participation in the investigation

6.5 Semi-structured focus groups

The following focus groups were planned:

- Gauteng: 12
- KZN: 9
- Western Cape: 9
- Eastern Cape: 5

Focus groups would consist of representatives from the eleven occupations, taking into consideration the need for gender and race balance, but even more the size of the company and its role in the sector. The selection should ensure that emerging and BEE companies would be sufficiently included. In Gauteng 3 mixed focus groups would be organized to make provision for emerging and SME companies. In the Eastern Cape the five focus groups would combine some of the occupations.

6.6 Individual interviews

The following interviews were planned:

- Gauteng: 3 managers of large Print Media and Publishing companies; 2 managers from SME and BEE companies; 2 union members; 3 managers from government institutions; 2 interviews of MAPPP-SETA chamber members
- KZN and Western Cape each: 2 managers of large Print Media and Publishing companies; 2 managers of BEE/SME companies; 2 union members; 1 MAPPP-SETA chamber member
- Eastern Cape: 2 managers of large Print Media and Publishing companies; 2 managers of SME/BEE companies; 1 chamber member

6.7 Selection of respondents

Respondents in the focus group meetings and interviews were selected from two databases provided by the MAPPP-SETA:

- MAPPP-SETA Database for the Publishing and Print Media Sector, with the selection limited to the four provinces
- SARS Database of companies in the Publishing and Print Media Sector

The HSRC compiled contact lists from which respondents were selected, and which included the following number of companies (large, medium and small companies), as well as key role players in the sectors. The selection was initially done by the HSRC, based on the known size and importance of the company in the sector, and then verified/amended by the sub-contractors who used their own databases in consultation with the HSRC:

| | Publishing | | Print Media | |
|---------------|--------------|----------|--------------|----------|
| | Contact list | Selected | Contact list | Selected |
| Gauteng | 49 | 49 | 30 | 21 |
| KwaZulu-Natal | 37 | 26 | 71 | 27 |
| Western Cape | 40 | 39 | 34 | 31 |
| Eastern Cape | 11 | 11 | 17 | 17 |

In addition, the SARS Database provided information on hundreds of small ventures in both categories. However, in many cases this information was obsolete.

6.8 Reporting

In terms of the Terms of Reference for sub-contractors, the latter were required to report as follows:

- a. Reports on interviews within three days of each meeting/interview
- b. Deliver a consolidated provincial report
- c. Submit a tape of the interviews, indicating name and contact numbers of respondent, and date and location of interview.
- d. A consolidated provincial report which covers both focus groups meetings and individual interviews.

In terms of the final report to the MAPPP-SETA, the HSRC agreed to;

- a. Develop a framework for the report jointly by the HSRC and the sub-contractors.
- b. Deliver a report not later than 27 October 2006

7 Time frames

The following time frame was stipulated in the contracts:

- a. Focus groups and interviews to take place between 9 and 22 October
- b. First provincial reports to be submitted before or on 24 October
- c. First consolidated report to sub-contractors before or on 26 October
- d. Comments on consolidated report before or on 27 October
- e. Project report to MAPPP-SETA before or on 27 October

8 Limitations, problems and achievements

From the start a number of limitations and problems impacted on the ability of the HSRC and its sub-contractors to achieve the objectives as specified in the Terms of Reference.

8.1 Time

The time provided for this project was immensely tight, as all parties knew. The HSRC sent its quote to the MAPPP SETA on 11 Sept 2006 but was only able to find reliable sub-contractors by 2 October. In reality the sub-contractors could only start with sending out invitations by 6 October, but response from potential respondents was initially extremely weak. Focus group meetings and interviews started from 11 October, with most of them, after resistance from the sub-sectors, in an adapted format from 16 October.

8.2 MAPPP-SETA database

The sub-contractors indicated that the MAPPP SETA database was highly problematic. At least half of the addresses, telephone numbers or contact persons had changed. Many smaller companies did not exist anymore. In all cases, the sub-contractors reverted to their personal database, but these did not always have the same companies. The HSRC allowed for substitution as long as the representativeness of the sub-sector was not seriously affected. However, this put a significant time stress on the sub-contractors.

8.3 Knowledge of MAPPP-SETA in the sub-sectors

The HSRC quote was based on the assumption that the sector was informed about the investigation by the MAPPP-SETA. Otherwise it would be a burden on the sub-contractors to explain exactly the purpose of the focus groups to every respondent. MAPPP-SETA provided a letter of introduction to explain the importance of the investigation, and the value for the sector. The sub-contractors found two trends in responses from companies:

- smaller companies did not have any knowledge of the MAPPP-SETA, and the sub-contractors had to put much effort into convincing them of the value of the investigation. It is clear that the link between the SETA and the medium to smaller companies is unsatisfactory. Most small companies did not recognize the SETA as a valid representative of their training interests.
- The second trend was among larger companies. In many cases MAPPP-SETA communications seem to be directed to the Human Resources departments, and no-one in the other departments had knowledge of the SETA. It is clear that the MAPPP SETA needs to revisit their communication with the sector.

8.4 Availability

Added to the lack of knowledge, respondents were often reluctant to participate in the investigation, and particularly the focus group meetings. The sub-contractors found three main trends:

- larger companies' response was that at this time of the year no senior manager, section manager or any senior person could spare a few hours to leave the company for a focus group

meeting. The coming Christmas season puts companies in a tight time schedule. In several cases, senior managers were willing to engage in an interview.

- The second trend was among small to medium enterprises. The general response was that the company only had a few employees, and these could not leave the company for even half an hour, as this would impede production.
- Any suggestion of a focus group after hours was turned down, in view of people's personal lives.

In several cases, the sub-contractors used their professional relationships and contacts in companies to convince people to allow an interview. Resistance to focus group meetings was extremely high. For example, only one person attended the first focus group meeting in Durban, and none in the subsequent two meetings. In Gauteng three focus group meetings were held. However, two participants left during the discussions, arguing that the same information had been provided to the Print College in an earlier investigation. This information could not be verified. In the Eastern Cape, sub-contractors found that another organization was doing similar research (as it seemed), but this did not impact on the HSRC investigation. Some respondents argued that similar investigations had been conducted in the past, and that no results had been received. SANEF, which conducted its skills audit in 2005 is one such example. The Chairperson and Director of SANEF were contacted, of which the latter identified a SANEF representative for the study who was, however, unavailable during the interviewing period. Her concerns regarding the need to interview (print media) news editors were subsequently accommodated. Critically, the editor of the City Press newspaper is a member of SANEF Council, and is the ex-Chairperson of the forum. His responses to questions reflected some of the concerns and findings from the SANEF audit.

Finally, it is important to note, there exists no real union for publishers. The contracted researchers hoped to secure the input of the Media Workers Association of South Africa (MWASA) but this was not forthcoming. Instead, the opinions of member-driven industry bodies were solicited, one of which was in the process of completing research on skills requirements for community newspapers and publishing.

8.5 Representation of sub-sector and occupation

The neat differentiation of the sub-sector and occupations in 4.2 above did not reflect the reality of the sector, at least not for small to medium companies. Many companies are both publishers and printers (e.g. Caxton). In many small and medium companies the general manager is responsible for at least two to three occupations. It made no sense to invite the same person to two or more focus group meetings, with the assumption that he/she would just wear a different cap. Work in the medium to smaller companies is too

integrated and interdependent, and differentiation of occupation is often just in terms of office/communications and work floor/printing machines.

8.6 Interest in participation

Generally senior HR staff realized the importance of the investigation, although it was perceived of long-term value, not short-to-medium value. Most companies work on short-term conditions with at most a half-year horizon. Generally, interest in participation was very weak, and even the letter of introduction from MAPPP-SETA did little to improve attitudes. Even some of the MAPPP-SETA Chamber members were not available at such short notice.

8.7 Impact of 8.1-8.6 on the methodology

After consultation with the sub-contractors, the following changes were made to the methodology:

8.7.1 In KwaZulu-Natal, Eastern Cape and Western Cape it was decided to replace the focus group meetings with individual interviews. It was agreed that KZN and WC would aim for 25 interviews each, and Eastern Cape with 15.

8.7.2 In Gauteng, focus groups were not limited to single occupations, but rather mixed, which in fact delivered more critical views and better discussions. In the end, 12 interviews were held, but with much effort to locate respondents and find them willing to set time apart.

8.7.3 In total, 90 individuals were interviewed and 17 people participated in focus groups.

9 Findings

In view of the focus of the MAPPP-SETA on the identification of challenges per occupation, HSRC agreed to use two categories as the framework for the reporting of findings:

- Subsector (Publishing and Print Media)
- Occupation (as defined in 4.2 above)

Although in view of point 8 above, it was often not possible to maintain the differentiation of occupations in the interviews and focus group meetings, the report attempts to retain the differentiation, and indicate interdependence where necessary. For example, some magazines were categorized under publishing companies, while the newspaper and magazine print workshops were providing information that related more to the print media. Also, the graphic design studios in publishing houses don't seem to differ too much from those in printing workplaces.

The same applies to the differentiation between scarce and critical skills. From a systems view, all skills within the sub-sectors are critical due to the high demands for quality by clients, and the competitiveness of the sector. It is a sector in which employees are asked to give everything they have, and

prevent anything that decreases the quality of the product. Most critical skills are scarce as well. The report will thus show some overlap between these categories.

10 Publishing sub-sector

10.1 Managers of publishing houses

10.1.1 Industry needs analysis

10.1.1.1 Existing occupations in the industry

- Types of managers:
 - General manager
 - Publisher/ Publishing Director
 - Human Resources Manager
 - Media Planner
 - Procurement Manager
 - Media Liaison Manager
 - Marketing Manager
 - Advertising and sales manager
 - Copy right specialist

- The publishing sector is a relatively small industry. People are focused on their job, there is no time for other people's need for capacity building, as non-productive actions may lead to loss of competitiveness.

- There is a wide variety of publishing companies, from listed companies to small in-house or local neighbourhood and community publishers. For example, Media24 publishes over 55 magazines, and has over 1000 full-time employees and thousands of freelancers (vendors or suppliers). On the other side, one finds companies like Umgangatho Media Communications and Isizwe News, with fewer than 5 people, and one manager who handles all aspects of the business. In between one finds companies like Jacana, that are growing into medium companies, with different sections that deal with editing, pre-print preparation, marketing and distribution.

- Managers are core people in the industry, like captains on a ship or airplane. They are responsible to the owners of the company for effective and efficient full value-chain functioning of the company. Or, in the case of SMEs, they are the owners, and carry the burden of sustainability of the company within a tight market. This implies that they need excellent skills in general management; an eye for new business and the requirements of the market; and good care for the personnel of the company. The larger publishing houses have at least one general manager or

CEO, and a number of managers for specific departments in the company (see also 2005 SANEF report). Smaller publishing houses have only one or two managers, with the continuous threat of attrition of staff to larger, and more lucrative, publishing houses.

- Companies cannot exist without managers, which is critical in the sub-sector. There seems to be a shortage of adequately-skilled managers, or rather, a pool of competent people from which future managers will come. There is no specific training for publishing managers. Several respondents indicated that they continuously have to address new situations for which they have not been formally trained, but that experience and basic skills and attitudes carry them through, and enable them to adapt. The main concern is about the need to increase numbers of general managers in view of growth in the sector. Companies tend to poach experienced managers from each other, rather than join hands to build up a larger pool of successors.
- HR managers are key to sustainable personnel development, e.g. personnel, recruitment, payment, BEE, although some units of larger companies function autonomously with regard to personnel development. HR managers also facilitate training and skills development. Changes in the role of managers relate primarily to scale of operation, when increasing market shares lead to increased production. Another area of concern is the need for mediation skills due to requirements of BEE legislation. HR managers, however, seem to be primarily supportive to production managers, rather than full partners. In SME's HR issues are handled by general managers, who often have no formal training in the field.

10.1.1.2 Skills needs and gaps

Managers indicated that their responsibilities required specific attitudes and skills.

Typical attitudes that are required to make a good manager are the following:

- Passion for information gathering, e.g. through vigorous reading, attending relevant meetings, and involvement in the operations of the company
- Interest in development trends in society
- Keen interest in the company as a whole – what works/does not work – and finding ways to make things work better
- Keen interest in the well-being of staff members to ensure high retention rate
- Eagerness to become leaders, rather than mere managers
- High ethical and moral attitudes to address challenges of a society in transformation
- Ability to work under strict deadlines and under pressure

- Highly adaptability to the demands of the market
- These attitudes are common among managers, and are some of the main reasons why they are appointed. This applies to both large and medium to small companies.

Typical skills that are required are the following (*indicates a concern among respondents about a significant gap between attitudes required and those available):

- Leadership skills, such as setting examples, leading teams in a participatory way, building an ethical basis for decision making
- General business and financial skills; these skills are often obtained in other industries, but remain applicable at top level in the sub-sector
- A solid academic background, such as a diploma in HR, B.Com. or MBA (this is the case especially with larger companies). This provides a generic grounding for the demands of the job.
- A basic knowledge of specialist fields within the sector/company, such as magazines and text books, or pre-printing and printing departments
- Ability to adapt their specialized training to a new working environment.
- Project and programme management skills, which enable managers to have an overview of the full production chain, including marketing and general management
- Analytical skills and reasoning
- Change management skills*, in view of new industrial environment; BEE legislation and increased markets
- Multi-cultural management skills* for an increasingly multicultural workforce; this is partly due to increased interest among Africans for working in the publishing sector, and partly due to requirements of labour legislation. These skills include the ability to effectively share decision-making responsibilities within a multi-cultural context. Multi-cultural management skills also apply to the functioning of the company within a changing global environment. Particularly in the SMEs these management skills are lacking, and managers base their actions on everyday experience.
- Promotion of the use of electronic publishing tools either personally, or through recruitment of specialists (content and technical ability)
- Specialised copyright knowledge* and ability to apply and enforce copyright* in a world characterized by plagiarism and photocopying

It was difficult to establish when skills gaps exist as respondents knew little about existing training provision outside their companies, and they found it difficult to generalize about newcomers in the management field.

10.1.1.3 Critical challenges for management

- The changing environment impacts on high level management, e.g. there seems to be an increase in book buyers (who are not necessarily readers) and specialized magazines, which create niches in the market and require new insights and strategic understanding among managers
- Generally managers indicated that they had learned to cope with the requirements of their jobs over time, but that newcomers would preferably have to become familiar with these demands from the start. These skills should therefore be integrated into any training provision. Presently, skills acquisition happens mainly on the job, which implies that this approach will put more pressure on existing managers.
- Managers are challenged by the need for survival in a competitive dynamic environment, where innovation is key, but also costly. It is particularly challenging for SME managers to expand into a medium size company, or to move from one category of publishing (e.g. school books) to the trade market
- Handling of technological innovation, e.g. e-publishing (Amazon, Kalahari)
- On the one hand, there seems to be a demand for new managers, as in other occupations in the industry. On the other, entry is difficult as those who are in the industry seem to be indispensable and stay on
- It was suggested that succession planning should be developed in top management rather than to recruit from staff when need arises
- Set standards for different levels of jobs, performance agreements; clarity on career planning
- The multi-cultural environment in Africa, including South Africa, sets challenges for managers to adapt. On the one hand, the environment experiences major technological changes, and on the other, a new audience of African writers and readers which has particular characteristics and preferences is growing. Particularly, Gauteng with its multi-cultural workforce base requires more multi-cultural skilling.
- In view of the increasing differentiation in occupations, there seems to be a need for more interaction between authors, publishing agents and publishers. This may also bridge the gap between African writers and publishing houses.
- Presently, the large companies have monopolies on rural markets, e.g. Naspers and Struik; SMEs lack resources and need to be groomed into quality publishers that can take risks in a highly competitive market. Large companies need to assist emerging community publishing houses in rural areas in order to create a pool of expertise
- In view of the growing market in educational books, publishers need to retain ongoing contact with the Department of Education

- In SME companies, the challenge is to find managers who are affordable, i.e. add enough revenue to cover their costs to company. Large numbers of small publishing houses have to rely on multi-skilled managers, which can have a negative influence on quality and scale of operations.
- Furthermore in SMEs the challenge is to get a critical mass of personnel in order to produce. This includes both recruitment and to retain experienced staff without using exorbitant salaries

10.1.2 Scarce skills

10.1.2.1 Hard-to-fill vacancies

- Most managers are recruited from inside the companies, as a general knowledge of the company is required. However, this often means that departments within those companies must find replacements without losing effectiveness and quality
- Smaller companies may make special appointments for expansion or change in market niche. This is risky as there is no guarantee that the profits will increase within sufficient time
- Retention of skilled managers is difficult. Companies poach from a small pool within the sector, and the same people remain in the management environment, with little injection of new blood
- The industry will have to cooperate in the expansion of the pool of expertise
- HR is not a scarce skill, but experience in the publishing sector is
- Procurement managers are scarce

10.1.2.2 Changing skills profiles

In terms of general management, profiles seem to be rather constant with regard to programme management, strategic management and human resource management skills. In view of the dynamic environment, the following skills profiles are changing drastically:

- Need for advanced computer skills, particularly in the magazine publishing industry
- Multi-cultural management, conflict resolution and participatory management

10.1.2.3 Absorption rates

- Although there are shortages whenever managers move out, there seems to be little growth within the traditional publishing sector, and therefore fewer entries
- Newcomers to the sector require a number of years in employment before they can qualify as managers
- In larger companies, managers tend to come from inside as there is a requirement to know the company and the way it functions
- Managers of small to medium companies are poached or attracted through word-of-mouth and personal interaction.

10.1.2.4. Scarce skills projections

Besides the above trends, a major issue is the dominance of metropolitan/urban locations of publishing houses. Over 80% of the publishing houses are in Cape Town, Johannesburg, and Durban. In general, successful SMEs in rural areas tend to move to Johannesburg or Cape Town. Urban environments attract people due to higher remuneration and abundant resources, e.g. the presence of clients and of printing companies. Through training, rural managers should be capacitated to sustain their businesses, particularly community publishing ventures (including local newspapers). Good experience in rural areas could be a stepping stone to more lucrative work in cities. Larger publishing houses should have outreach programmes particularly now that rural areas are electrified and accessible, and also have become new markets for products.

10.1.3 Critical skills

10.1.3.1 Essential skills

As mentioned under 10.1.1.2 respondents emphasized that managers needed more than skills, including attitudes and leadership. Many of these skills/attitudes come through experience over the years, rather than through formal training

A good manager would:

- Have a passion for information and be vigorously engaged in reading
- Have high levels of curiosity about the world around him/her
- Follow trends – what works/does not work; update the management style or system
- Ability to see new ventures and opportunities, move away from traditional views of publishing, and anticipate gaps and niches, e.g. African publications, electronic publishing
- Be research orientated and able to identify trends in a critical way
- Have sound financial management skills
- Have skills for people-centred management, creating encouraging work environments.

10.1.4 Match between education and training and skills needs

Respondents' knowledge about training for management was limited as no specialized training exists for such high level jobs. Most had gone through varied career paths, including in-house experience and obtaining general qualifications. Taking this into account the match was described as follows:

- There is a lack of information on training opportunities in the sector
- Tertiary education institutions provide training in general management and finance, but not specifically for the publishing sector.
- Academic training provides critical and generic skills (systematic and structured thinking and planning, research attitude, reading

- skills, communication skills) which can not be obtained through practical experience (on-the-job training)
- Academia focuses on knowledge, which is important for generic issues, but there is a need to link knowledge and skills, e.g. through experiential training.
 - On the job training in the technical aspects of publishing can be equal to formal training as the most important thing is to know your business
 - Additional training is time consuming and there is a preference for internships
 - There is a need for fast-tracking of training
 - Current training in HR is sufficient for the sector

10.2 Authors, technical writers

10.2.1 Industry needs analysis

10.2.1.1 Existing occupations in the industry

- Authors, journalists, writers operate mainly within:
 - General publishing (magazines). This occupation is for people who enjoy opportunities to engage with the world, and like the unpredictable, be constantly surprised
 - Specialist publishing (magazines, text books, non-fiction); writers are often specialists (e.g. academics) who enter the journalism fields because of their personal interest in the subject
- Summarised the following occupations exist:
 - Feature writers
 - Freelance writers
 - Journalists
 - Specialist writers (business, finance, mining, construction, legal, etc.)
 - Authors (books, etc.)
 - Art directors
- The choice of publishing area impacts on career paths because requirements are often different: from general informative or investigative writing to specialist writing, from fiction to non-fiction, and from general to educational
- Generally, people enter the sector due to a passion for reading, writing and enlightened education
- Both areas (general and specialized) need good writing skills combined with technical knowledge, e.g. computer literacy, as well as language proficiency
- As communication technology provides tools for direct communication, writers and journalists can now travel all over the country or abroad, while submitting text from out there to the head office.

- Recent developments in the occupation are mainly contextual (changes in the specific field of interest of the writer) and technological (software and hardware)
- Writing good texts does not change much: proper use of language is important, how to express yourself to an intelligent reader
- But now we live in a more egalitarian society, and issues like race and gender sensitivity influence readers' choices.
- Press freedom brings moral and ethical challenges about what one can write about, and what not
- Instant news is available electronically. Writers find easy access to information on the internet; however, this information may not have gone through thorough cross checking and verification. In the past, writers used books, which are more systematic and in-depth
- The demand of the reading market is on the rise, and vast sections of the population can be stimulated to read more books. However, the market has become even more competitive, as audiences/readers continually look for quality and specialized texts
- Future paths of writers are open-ended due to specialization, and the possibility to move to editing

10.2.1.2 Skills needs and gaps

As with management, writers and authors not only need skills, but also the right attitude due to critical readers and the need for responsible publishing

Attitudes and aptitudes:

- Curiosity and drive, interest in society
- Research attitude, dig deeper into issues
- Passion
- High adaptability and ability to work under pressure
- Deadline driven
- Attention to detail
- Focus

Skills needs (* indicates gaps)

- Language skills, from general language to specialist terminology and concepts*
- Reading ability*, to sharpen their skills and enrich their use of language
- Writing skills*, expressing and communicating clearly and convincingly
- Word economy*, particularly for magazines; ability to construct a story
- Specialist knowledge, in-depth, insight in subject of writing
- Basic sense of numbers, and economics as they impact on life
- There is currently a big gap between skilled authors, editors and publishers, and emerging ones

- There is a need for the basic understanding of the whole production chain from author to distributor*, particularly when visual material is used in the text
- In the past, SA writers wrote from their political position, now they are subject specialist, who often write in an advisory capacity
- Currently English and Afrikaans writers dominate, and there is a need for more competent African writers*
- Future will remain the same, but more freelance independent reporters will enter the sector without sufficient competency
- Also, more publications in African languages are expected to be published, therefore training in writing must be adapted*
- Current training occurs mainly through English; there is a need for multi-linguistic material*
- General knowledge, multi-skilling for adapting to new assignments

10.2.1.3 Critical challenges

- To move away from stereotypes in training which often appear in the theory component; theory is important, but has to be linked to experience. Combination of theoretical training with experience within working environment characterized by time pressure.
- To train critical skills on the job is time consuming. Companies don't set time aside for this purpose, particularly medium and smaller companies that publish under serious constraints. At best an editor is willing to give advice. Larger companies provide internal training to new staff
- Creating a competitive environment for training and internships, rather than measuring affirmative action targets. According to some respondents, editors fix stories of new writers, rather than return manuscripts for improvement by the author. This applies particularly to publications that are produced under stiff time schedules. This process denies people a stimulus for performance and undermines their confidence
- Inculcation of work ethic in students particularly in the present transformation period which raises high expectations for redress
- Employ more African editors in large companies
- Get to know the new breed of readers: business, finance, specialized fields or African languages
- Need to understand future of language use by population, e.g. Western content-based textbooks are not easily understood by African learners
- Obtain a critical personnel mass in SMEs for the production of high-quality text for discerning readers
- Establish specialist associations, e.g. Authors Non-Fiction Association
- The training of bookstore and community library personnel to recognize new talent among their users and to promote a reading culture

- SMEs have a special challenge in getting authors to stick to them; when authors want to go international, local SME publishing houses seem to be inadequate for the challenges

10.2.2 Scarce skills

10.2.2.1 Hard-to-fill vacancies

There is an increase in people who want to write for the publishing sector. However, there is a need to remove obstacles that prevent people from entering full-time work in established companies. Furthermore respondents indicated that companies are reluctant to appoint new staff without assurance of their writing competency. This reluctance persists despite shortages of staff. The following hard-to-fill vacancies were mentioned by respondents:

- In terms of writing quality:
 - Few writers have investigative skills, which is required for in-depth writing
 - Limited ability to confirm facts and figures among newcomers
- Language:
 - Particularly in specialized fields, the requirement of multilingualism is a problem; there is an increasing need for language editors and translators
 - Proofreaders in various languages, particularly African languages
 - Translators from and to African languages
- Technical:
 - Advanced computer skills
- Content issues:
 - Improved general knowledge
 - Scarcest skills are technical writers and business journalists
 - Editing of own text (content) before submission to editor
 - Specialist knowledge of legal, constitutional issues

10.2.2.2 Changing skills profiles

Generally the skills profiles in this category remain the same, but specialization brings more focus to occupations

10.2.2.3 Absorption rates

Industry is faced with a continuous tension between the need for more specialized and informed publications, while having to absorb more writers who still have to learn on the job, while mentorships are not readily available. The following trends were identified:

- In principle, access barriers are low, but companies use selection processes based on competency; if a writer's articles cannot be published without major editing, such a person is asked to leave the company. As labour laws make it difficult to retrench full-time reporters, people are allowed to enter this occupation as contract workers or freelancers.
- Magazines tend to have a high staff turnover, mainly due to work pressure and opportunities for higher remuneration elsewhere

- On the one hand there is a need for more specialist skills. On the other hand, the industry is growing slowly due to small clientele base. As a result few job opportunities arise for those newcomers who don't have specialist knowledge.
- Knowledge about the writing industry among African youth is limited. Most only know about becoming a journalist for newspapers or magazines. The challenge is to promote the diversity of jobs in the publishing sector
- There is little career guidance on the complexities and demands of the industry
- Particularly in scarce occupations, companies revert to headhunting, which leads to a circulation of the same people within a small industry

10.2.2.4 Scarce skills projections

- Future trends indicate an increase of African writers who want to publish but are not experienced or formally trained
- Increasingly, African writers want to write in their mother-tongue, as encouraged by government policies. This in turn requires an increase in editors who can understand African languages
- This also requires research skills training among new authors
- It requires publishing agency skills to mediate between the authors and the publishers.

10.2.3 Critical skills

10.2.3.1 Essential skills

As in the other occupations, skills are not everything. Some respondents indicated that the attitudinal aspect is as important as the skills. In addition, personal style has become important, like a brand name, for increasing readership

- Ethical issues:
 - Professionalism, drive and self-motivation
 - Critical mindset and consciousness
 - Accuracy and eye for detail
 - Knowledge of copyright and plagiarism laws
 - knowledge of what not to publish; need for detachment, not partisanship
 - historical awareness
- Skills:
 - Structuring of thoughts and ideas into a coherent text within the requirements of the specialist field and the parameters of the publication
 - Critical thinking, clear analysis, e.g. journalists reporting on SA problems
 - People tend to simplify, so to know how to retain some complexity of reality
 - Specialist journalists need research skills, e.g. how to access public information
 - interviewing skills

10.2.4 Match between education and training and skills needs

Respondents varied in their opinion about education and training. In some aspects existing training is considered of good quality, e.g. formal writing and specialist training. However, there is little linkage between the formal training and the reality of the professional writing environment. Some aspects are:

- Training for journalists is sufficient for a start, as long as the incumbent has passion, drive and self-motivation to learn some more outside the classroom.
- Few training institutions address the issue of language
- Most tertiary education institutions for journalism provide theoretical knowledge. Training providers do not address the reality in the industry, due to lack of knowledge about needs; lecturers should also regularly publish as editors
- People with non-formal education can enter publishing if they have passion, are competent and have natural flair/talent/intuition. However, book design is difficult to do without formal training
- There is a need for mentors who guide newcomers; mentors themselves must be trained for this role. Such training courses are scarce
- There is a need for short courses to fill up gaps, but this is expensive for both the newcomers and the companies, unless they are sure of profitable returns on this investment
- A number of institutions promote good writing, e.g. the New Foundation of Media Excellence and the Institute for the Advancement of Journalism

10.3 Illustrators, graphic designers

10.3.1 Industry needs analysis

10.3.1.1 Existing occupations in the industry

- Existing occupations:
 - Art director
 - Graphic designer
 - Layout artist
 - Illustrator
 - Photographer
 - Cartoonist
 - Professional illustrator
 - Children's book illustrator
 - African text illustrator
- Although less critical than in the case of writers and authors, the publishing industry cannot work without illustrators, graphic designers and photographers. Nowadays, audiences are more

visually orientated than before. Indeed a picture can say a thousand words. Artistic skills are probably scarcer than those of writers, as talent plays a major role. On the other hand, computer technology allows people to explore and apply their creativity without the demand for high talent.

- Large publishing companies have permanent staff in the sections of photography and graphic design, particularly for the layout of pages and for the manipulation of images. More talent-based occupations, such as cartoonists, are usually freelancers.
- There is enough work in this part of the industry, but there is a gap between the general expectation of artists and editors. Industry wants experienced artist or those who have already established themselves elsewhere
- In textbook publishing, there is a dire need for good illustrators that can clarify texts and concepts to learners. Such artists also work mainly on freelance basis, which suits their need for creative freedom
- Investigative or documentary photography is highly valued in the publishing industry, both in the newspapers and magazines, as well as in the book publishing industry, especially for coffee table and tourism publications.
- A special need exists in the advertising industry, which often uses publishing houses as their platform for reaching the public.
- Several respondents indicated that PDIs are often still excluded, and that transformation is needed, particularly in publications that aim for an African public.

10.3.1.2 Skills needs and gaps

Skills needs exist on artistic/creative, communicative and technological levels:

- Artistic and creative level:
 - Artistic quality can only be assured through comparative training in which students are exposed to the masters of the trade, so as to be introduced to the techniques and technologies that are necessary in the industry
 - Practical training under talented illustrators, arts schools, photography schools
 - Like all emerging professional industries: professionalism and audience awareness
- Communications:
 - Ability to communicate through visual media and graphics
 - Establishing brands with key attributes for consumers*
 - Need to understand African languages to ensure appropriateness of illustrations*
 - Knowledge of sign language*
- Technological/production:
 - There is a need for the understanding of the whole production chain process from author to distributor so that the correct

illustrations are produced, e.g. right cartoons for African audiences*

- More internships to fit illustrators into the system
- Knowledge of IT programmes available for the job (software such as PageMaker, Quark, InDesign, etc.), as well as the different operating systems (Apple OS, Linux and Windows)

10.3.1.3 Critical challenges

- The training of professional layout artists and designers that understand the publishing sector
- The provision of access for African students who did not have art at school and lag behind in artistic skills
- The need to empower rural areas
- Combining artistic aspects and technology
- Feedback loop from illustrator to pre-press to marketing and sales sections
- Communication between different software packages and operating systems

10.3.2 Scarce skills

10.3.2.1 Hard-to-fill vacancies

- Generally art schools and photography schools deliver well-trained illustrators and graphic designers. However, publishers look for illustrators who are experienced in specific environments, e.g. magazine design
- There is a general shortage of designers for the magazine industry, as it is a specialized field
- Good illustrators move from rural to urban areas; as a result publishers in rural areas depend on less-experienced illustrators.
- Smaller companies take advantage of young designers by letting them work long hours at low remuneration; due to lack of work opportunities, young designers comply, but this discourages career development.

10.3.2.2 Changing skills profiles

Changing skills profiles have mainly to do with shifting fashion trends, technologies, and audience expectations. Examples:

- Movement from abstraction to realism to high-stylistic representation
- Linking personal artistic style with needs of consumers
- Variety in stylistic preferences between audiences, e.g. youth, Africans, business people
- Move towards 3D imaging which requires advanced DTP skills
- Move from print towards television and internet communications.
- Need for more creativity to differentiate products in advertising; print media is still a long way from international standards

10.3.2.3 Absorption rates

Absorption largely depends on the growth of demand and acceptance by the public/readers/viewers:

- There are more applications than jobs, thus all the graduates from art schools are not absorbed into the industry
- In the meantime, demand for places in art and graphic design training institutions is ever increasing
- Absorption is directly linked to the quality of portfolios which show the graduate's passion, zeal, artistic and technological skills
- The flight of skills to Gauteng results in oversupply there and a depletion in the other provinces
- There are expectations of growth in media and communications in view of the 2010 FIFA World Cup tournament, which will be hosted in South Africa
- Absorption can be increased through internships and in-service training; some colleges and art schools have agreements with publishers
- SME publishing houses cannot afford full-time illustrators, and often revert to part-time or contract workers. When these illustrators move into the larger publishing houses with full-time appointments, SMEs suffer from lack of continuity

10.3.2.4 Scarce skills projections

- As technology will allow more creative production in future, there does not seem to be a shortage of skills
- Jobs are not secure, no guarantee for long-term security as the market gets saturated with graduates
- Artists and designers are better off with formal qualifications as few non-formal training provides access to advanced technology

10.3.3 Critical skills

10.3.3.1 Essential skills

- Artistic and creative talent
- Personality, but with an eye for client needs
- Passion and dedication
- Technological savvy and creative use of software
- Ability to get work ready for print at a technical level
- As freelancing is the entry point in many cases, entrants should develop business minded skills for survival
- Speed, creativity, multitasking, and working under pressure

10.3.3.2 Match between education and training and skills needs

- The MAPPP Print College provides training in technical aspects
- University training seems to be sufficient to start your own business
- New entrepreneurs need support to start own businesses, particularly for technology and build up of portfolio
- Internships mainly sharpen minds of talented people in relation to client needs

10.4 Editors, copy readers, sub-editors, commissioning editors

10.4.1 Industry needs analysis

10.4.1.1 Existing occupations

- This occupation consists of
 - Managing editors
 - Sub editors (Subs) / Copy editors,
 - Editor/ Editor-in-Chief
 - Layout artists who do visual editing
 - Designers
 - Photographic & Pictures Editors
 - Group Editor-in-Chief
 - Manuscript Administrator
- Functions have not changed drastically. Editors work on texts and documents that are submitted by authors. The main differences are at a technological level, e.g. global communications, and with regard to the influence of the political environment, which may impact on content.
- Changes are mostly in the magazine sector, with the ever-changing needs of the readership and technological innovations
- Depending on the company, whites still dominate editing in the publishing sector, but young black editors are increasing in number. This leads to juniorisation of editing teams, i.e. members of the team are young and have less experience than the older generation.

10.4.1.2 Skills needs and gaps

In general, participants indicated that skills requirements are the same as they were three decades ago: newsgathering, reporting, writing, language skills, inquisitive nature, and 'general/broad frame of reference'.

However, other participants indicted that this was only partially accurate as editors now require more management skills owing to the demands of bigger publishing companies. What counts is the persistence to deliver a good product, particularly in books and magazines

In general, the following skills needs were identified:

- Language skills:
 - Language Proficiency (especially in language of publication)
 - Critically, one of the participants highlighted findings from the SANEF Audit. This audit, released in 2005, found that general knowledge, and sentence construction was very poor among editors
 - Editing requires professional qualifications
- Writing skills:
 - Research skills
 - Ability to construct stories

- Multi-tasking/('multiskilling' to guide reporters writing across mediums (mobility across video reporting, radio-video reporting etc)*
- Specialised writing: finance, business
- Editing and managing skills:
 - Desktop editing
 - Copy editing
 - Ability to delegate
 - Sticking to the truth, and defending it
- System knowledge:
 - There is a need for the understanding of the whole production chain process from author to distributor, e.g. magazine editors that need to be able to embody the product
 - Circulation skills – requires marketing knowledge (especially important with move to online, and with increased subscription requirements)
 - Feel for market
- Technological skills:
 - Online skills – all media houses have IT specialists, but what is needed are media professionals with good online research skills*.
 - Sub editors now require electronic layout and design skills, digital production
 - Technical skills for design staff
- Ethical awareness:
 - Self awareness; self management; economic communications to audience, networking

10.4.1.3 Critical challenges

- Transformation:
 - Transforming the industry to include African writers
 - Major publishers are profit-driven; pay lip-service to socio-economic development initiatives of government
 - Desire to write has increased in society, need for guidance to write good material; editors have to play an educational and mentoring role
 - Lifestyle changes in South Africa require new approaches to reporting
 - Technological innovations, e.g. website communication
- Capacity:
 - Find enough editors who can provide content for magazines and for circulation
 - Editors need training in research methodology to guide authors
 - Editors training to be structured better, currently it takes just a career step from journalist to editor
 - The issue of poaching was again raised as critical, which was connected to fame achieved through bylines.

- The resolutions by the SANEF Skills Indaba identified the need to engage the national Department of Education to look at issue of language and media literacy at school.
- Work environment:
 - Instilling integrity, honesty, fair play; the industry is self-serving in order to survive, resulting in erosion of quality of publishing

10.4.2 Scarce skills

10.4.2.1 Hard-to-fill vacancies

- Content:
 - Art editors for magazines
 - Financial editors
 - Commissioning editors
 - Black editors, sub-editors and copy editors
 - Medical and pharmaceutical publishing editors
 - Editors for architecture publications
 - Knowledge about elections
 - Mathematics/science issues
 - Outcomes-based education
 - International reporting
- Technical:
 - Advanced computer skills, particularly for specialist magazines
 - Designers skills
- Editorial:
 - Proof readers
 - Layout sub-editors
- Ethical:
 - Passion and dedication in view of long hours, tight deadlines, no exposure, or glamour

10.4.2.2 Changing skills profiles

- Technology has affected news gathering routines; processes have changed over the years from dictation over phone to introduction of telex, then facsimile, to use of computer, to present day reliance on email and SMS. Technology makes telling stories easier and search engines assist research capabilities of journalists. However, there is still a need for global exposure and training for local journalists in order to act as editors
- There are increasing shifts towards different media and the sound and visual skill requirements necessitate a mind shift.
- Technology is impacting on industry – there is a move towards online journalism and thus a need to keep abreast of developments and to up-skill accordingly.
- Photographers for instance now must have digital skills and journalists are no longer just print reporters, but need to report for online media as well (video reporting, radio-video reporting etc)

10.4.2.3 Absorption rates

- Rates are low due to the need for specialist knowledge and reluctance of newcomers to enter slow career path
- Recruiting agents are able to identify good candidates through internship and/or learnership programmes, which allow for mentoring of bright talents and development of 'succession plans'
- Newcomers prefer the glamour of journalism rather than sub-editing
- According to interviewees, new entrants need formal training – entrants with formal training are more readily absorbed into industry than those with non-formal training.
- Media 24 did a test case in 2006 – they took people without formal training and put them through learnerships. This didn't go too well.
- Journalists with formal training – and those who are younger - move quicker through the ranks, and across electronic and print media
- SMEs often do not have funds for full-time editors, and subcontract, therefore not building internal capacity

1.4.2.4 Scarce skills projections

- Sub-editing: This is particularly evident as people prefer not to work long hours, under pressure, with tight deadlines, and without a byline, which means less exposure and fame (as compared to journalists)
- Good journalism: At least one participant indicated good journalism (which is about ethics, morality and the ability to write) is a scarce skill.

10.4.3 Critical skills

10.4.3.1 Essential skills

This largely coincides with new and scarce skills.

- Language:
 - Language use, particularly for magazines, books
 - Translation
- Editing:
 - Proof reading
 - Communications/contact making
- Writing:
 - creative skills
 - specialisation and general knowledge of industry
 - Storytelling
- Technical expertise:
 - Online skills
 - Digital skills (most junior staff seem to have these skills)
- Management:
 - Maintaining contacts – general knowledge to know how to make contacts

- Ability to manage large teams of editing staff
- General knowledge as frame of reference
 - Multi-skilling across media
 - General knowledge (most new entrants lack a 'general frame of reference')

10.4.3.2 Match between education and training and skills needs

- The majority of participants indicated that training institutions were important but these only provided basic skills; hence the large publishing houses tend to have in-house training programmes for new staff in order to meet their specific needs.
- Respondents were generally of the opinion that new entrants were equipped with a sufficient theoretical framework. However there are problems on the practical side – especially in terms of language proficiency, news writing and the ability to construct (different/angled) stories.
- Magazine editors need preferably to go through a newspaper route to learn time management, deadlines, focusing on facts.
- A welcome development is an attempt by an institution of Higher Education to introduce a course on Reporting Africa.

10.5 Marketing and sales managers, distributors, advertisers

10.5.1 Industry needs analysis

10.5.1.1 Existing occupations in the industry

- Depending on size of organisation, the following occupations exist:
 - Junior Telemarketer
 - Debtor Clerks
 - Senior Telemarketing
 - Section Head: Services (dependent on number of staff)
 - Section Head: Vacancies (dependent on number of staff)
 - Section Head: Property (dependent on number of staff)
 - Sales Rep – going out to see customers
 - Sales Managers
- In large companies, sales managers handle large number of staff, e.g. Media24 has 640 sales people
- Some respondents referred to marketing and sales as the safe area where one's personal political position was not threatened; news editors who did not have the guts to stand for their opinion moved to marketing

10.5.1.2 Skills needs and gaps

In sales and marketing, communication over the phone is a skill that new entrants are assessed on first (the first phone call before or following their being short-listed for example). Such innate ability is

more important than academic qualification. The latter can be used for managerial positions in sales, but not at communication levels.

- In general, the following requirements were identified:
 - Language skills
 - Interpersonal communication skills, as this is a relational job in which you need client understanding
 - New approaches are required to include various platforms; internet, print, cell phones
- Skills requirements for Juniors/ people on Sales floor:
 - Customer care
 - Language (multilingual, spelling)
 - Confidence
- Skills requirements for Sales Manager:
 - Ability to communicate at all levels (up and down);
 - Vast knowledge – ability to assist sales floor in all aspects of advertising and the newspaper itself
 - There is a need for the understanding of the whole production chain process from author to distributor
 - Understand media industry in its entirety, not only magazines or newspapers
 - Understand market trends, current developments, e.g. tele-selling and digital advertising
 - Entrepreneurial aptitude, turn opportunities into accounts
 - Ability to think strategically
 - Reception/Administration skills
 - Very good understanding of accounts
 - Good understanding of graphics
 - Team player
 - Ability to work alone
 - Advertising management has become more scientific and requires an entrepreneurial ability
- Besides skills, attitude is important:
 - In the past management was directive and focused on targets, now motivating, not threatening
 - Confidence

10.5.1.3 Critical challenges

- Career development
 - Career growth is dependent on passion and drive to succeed – which is something that cannot necessarily be learned.
- There is a loss of good leaders to international businesses. In general, staff stay longer if management is people-centred. Staff retention is affected by:
 - Location – staff prefer to live close to home and family and don't move around as much or across jobs as others in the heart of major cities.

- Expectations - new entrants or graduates appear to expect certain salaries and speedy job growth – the ability to move up the career ladder fast.
- Massive growth in advertising sector
- Publishers need to market the sector as a whole for careers
- Marketing and sales challenges:
 - Technological innovation, tele-selling, digital advertising, free internet access to information
 - People want information quickly, and revert to internet Google search engines; SMEs find it difficult to publish on the internet due to high costs; it also requires quicker turnabout time for books, before they become obsolete, putting high pressure on managers
 - Entering new market niches, as Naspers and Struik dominate the book distribution market.
 - There seems to be a growth in reading public, more books are sold and more books are written in African languages
 - Develop bookstore personnel for promotion of reading culture, particularly for the African population
 - Increase outlets for books, e.g. at hospitals, taxi ranks
 - Involve libraries, schools, bookshops, departments of education and Department of Arts and Culture in promotion of reading
 - Counter the impact of photocopying culture in education sector
 - Focus on school books has negative impact on trade books
 - Get good feeling for educational books, as investments are huge, with departments slow in responding
 - Understanding and ability to manage the tender process. Tenders kill the visibility of books and bookshops as books are delivered directly to schools
 - Strengthen communication between publishers, printers, authors, designers and sales people
 - Promote the need for subsidies for publications to promote reading culture
 - The establishment of a Publishing Institute to represent the interests of the sector
 - Particularly SMEs that want to enter new markets, have to retrain staff or add personnel, which has cost implications; SMEs generally don't have funds to invest in renovations

10.5.2 Scarce skills

10.5.2.1 Hard-to-fill vacancies

- Circulation staff, need for marketing knowledge, online, increased subscription requirements
- Sales staff, not because there aren't new entrants, but rather because it is hard to find the ideal candidate
- Good representatives of the company in marketing and sales

10.5.2.2 Changing skills profiles

- General skills acquisition:
 - Sales ability should be innate, not taught, candidates need a track record; companies assess applicants on innate skills
 - There is an inverse correlation between academic achievement and practical success
 - Advertising management is academic, professional (business)
 - Challenge is to build trust between two types
- Interpersonal skills:
 - Sales will always require face-to-face, interpersonal communication.
 - Clients become more savvy, salespersons need to understand the ever-changing client needs
 - Sales person becomes consultant to client, requires better knowledge of client
- Marketing skills:
 - The more educated a society becomes, the more diversified interests; community interests in publications
 - Increase in information requires more learning
 - Difference marketing and sales requires specialisation
 - Different sales platforms require different profiles
 - Identify opportunities, understand the sector, analyse clients' businesses before you go and see them, presentations, listening, manage accounts
- Technology does impact on skills needs and requirements. However, this change is not substantial as it is not difficult to learn updated computer programmes, which is the most occurring change.
- As technology plays more and more of a role, so it becomes increasingly important for new entrants to learn how to communicate with people

10.5.2.3 Absorption rates

- Most job applicants come from diverse fields and with various levels of experience. The skills necessary for sales are not dependent on formal training. It is possible to learn on the job, if you are the right candidate and have the qualities/talent necessary to succeed at sales.
- Companies use CVs, references, tests for selection
- Staff members are encouraged to move to other branches within the group, but some people stay for convenience (office situated close to home).

10.5.2.4 Scarce skills projections

- As technology progresses, fewer people will be able to communicate effectively with other people because people communicate more and more with and through technology, instead of inter-personally.
- In general, companies are not worried about acquisition of skills, as formal education is not a prerequisite

10.5.3. Critical skills

10.5.3.1 Essential skills

- Managers must be able to sell ideas and approaches to own staff for buy in, to motivate
- In marketing managers need language proficiency (e.g. ability to translate the language of an advert in such a way that it maintains its intentions and sales potential)
- Communication (especially interpersonal communication)
- For circulation specialists, there is little training; increasingly specialist knowledge is required, such as statistics
- Spelling
- Computer literacy
- Multi-skilling is increasingly required

10.5.3.2 Match between education and training and skills needs

- Virtually no marketing and sales training in formal education
- There exists a match in terms of marketing design, which requires formal training - unlike sales, which can be learned 'on-the-job'.
- However, even if staff is proficient in computer programme, they still need to learn a company-specific computer programme, most of which are introduced to the company, through in-house training.
- In large companies, induction courses are left up to individual branches as it is costly to have one person employed to train the entire company's staff as it is not guaranteed that at any given period you will have more than one person to be trained. Companies tend to create an environment for learning
- Staff is expected to get personal training beyond on-the-job training, through the company financing studies towards skills that can be used in the office. For example, sales people are encouraged to do a course in Sales and Marketing or a Diploma.

11. Print Media

11.1 Managers of printing workshops

11.1.1 Industry needs analysis

11.1.1.1 Existing occupations

- Types:
 - There are various types of managers in the print media industry: general managers, newsroom managers, administration managers, financial managers, procurement managers
 - Managers need to be good at client service, enabling business growth, efficiencies, profit for shareholders
 - Operations manager must understand technology, be able to deal with people

- Entry:
 - In the past, managers entered through family ties, apprenticeships, known experience
 - Old alma mater relationships also determined entry; most people work for years in industry
 - Now entrance is through apprenticeships, career focused growth; word-of-mouth
 - Due to BEE and Affirmative Action (AA) legislation, more African managers are appointed
 - Smaller companies are forced to take whatever they get due to lack of resources
 - Promotion is primarily based on experience, contacts in the company, being able to meet deadlines
 - Managers can move laterally in the company instead of promotions
 - Companies poach from each other
- Location:
 - Very much Johannesburg, Cape Town-based where multinationals and clients are
 - Print media companies need city for large space for machines
 - But KZN has number of smaller printing companies
 - Will be influenced by government tenders, e.g. provincial preferences
 - Often bigger companies open outlets in other provinces

11.1.1.2 Skills needs and gaps

- Attitude:
 - Desire for hard work, commitment
 - Service orientation
 - Patience for working under pressure;
 - Entrepreneurial flair, this requires no formal training, but vision
 - Recruiters focus on young people with drive and passion, and new ideas
- Industry orientation:
 - Ability to analyse clients' needs
 - Clients want more innovation and dynamic solutions
 - In view of multiple platforms for printing, managers must become multi-skilled, know different industries; provide end-to-end solutions
 - Marketing increasingly starts at the top, between MDs, managers must be able to negotiate after identifying potential clients for accounts
 - The print media industry is more a communication business, not printers only
 - New environment with mergers, global competition, customer needs, new legislation
 - International purchasing and tendering requires negotiation and selling skills
 - Knowledge of tariffs, input prices, global trends

- Management
 - Team player
 - Requires good time management skills
 - Overview of whole company
 - System manager
 - Ability to provide quality assurance
- Technological
 - Aware of technological challenges and potential
 - Appreciation of colour, images, end products

11.1.1.3 Critical challenges

- Managers' roles have changed
 - More client focused, less product focused;
 - Increasingly business is achieved via MD to MD, not through salespersons
 - Requires good financial skills, budgets, reviews, forecasts
 - Particularly community media in small towns are challenged by the need for regular publications but without sufficient income from sales; although such community publishing houses don't have funds for new machines, they are near to the public and address local issues
- Retention:
 - Retention of Previously Disadvantaged Individuals in industry is difficult as they are leaving country
 - Industry must put concerted effort in training young people; now the industry is too profit driven and there little interest in training them
 - Senior managers of large companies have started own SMEs for tabloids
 - Large companies are avenues for employment
- Technological:
 - High speed information technologies set new challenges
 - Future trends are the innovative production of newspapers; decreasing reading habits; competition with audio and visual
- Competitive market:
 - Difficult to compete with China, India, Dubai in terms of printing; where time is not an issue work is increasingly outsourced to other countries with better technology
 - Expensive new machines unaffordable for smaller companies; this increases the gap between larger, and more powerful printing houses, and SMEs. Some SMEs prefer to focus on less advanced products, which do not require new machines, and are able to retain staff

11.1.2 Scarce skills

11.1.2.1 Hard-to-fill vacancies

- Seniors from rural areas leave for Johannesburg, Cape Town and Durban

- Most people will fit the requirements for a senior management post, even from different industries; due to scarcity of good managers in general to replace senior managers is difficult
- Main skills required are: finance, HR, tax, law, marketing

11.1.2.2 Changing skills profiles

Skills profiles at highest level don't change that much. Mainly:

- From management to entrepreneurship
 - Quick turnaround production addressing specific client needs,
 - More customer-driven attitudes
 - Print on demand
 - Focus on end-to-end solutions
- People skills for team management
 - Importance of communication skills; requires basic English, but more human interaction
 - Deadlines give chaos and stress, need communication
- Technologically:
 - Major changes occurring, digital printing is the future
 - Sector will change: diversification among SMEs
 - Fewer staff required; litho printing needs up to 6 staffers, whereas with digital printing only 1 person can do the whole job
 - Smaller machines become cheaper, more SMEs can enter the market
 - Larger companies focus on high-end skills, more machine management
- Convergence of skills
 - Multi-skilling of managers
 - Need work ethics, which usually comes with tertiary education

11.1.2.3 Absorption rates

- Entries:
 - Recruitment from colleges, recruitment agencies
 - Word-of-mouth, identify candidates in other companies
 - Graduates have high salary expectations
 - Technical diplomas give technical background, but more is required for higher manager positions
 - Apprenticeships still valued by industry
- Retention:
 - Poaching is rife because there is a small pool of managers; clients start doing their own work and poach managers from companies
 - Retain through salaries
 - Keep people happy, salaries work environment

11.1.2.4 Scarce skills projections

As in most industries, the combination of entrepreneurship with leadership and technical awareness is the key to growth in the occupation

11.1.3 Critical skills

11.1.3.1 Essential skills

As in the publishing sector, essential and critical skills often coincide with scarcity. The following are essential skills and attitudes:

- People skills:
 - Business logic, motivation, drive a team, look for opportunities, innovation
 - Must be a people's person, especially with clients in order to get key accounts
 - Ability to work with workers' unions
- Attitude:
 - Work ethic and commitment
 - Sharing and communication
- Flexible management:
 - Clients can be served anywhere, companies just freight products
 - Where there is more need for high-end products, the manager needs specialized skills, and apply cutting-edge management style
 - Technology allows for computerised workflow management, requiring advanced skills

11.1.3.2 Match between education and training and skills needs

Generally, managers indicated that formal education provides the basic skills for their work, but that it was the in-house experience that has made them more effective. The views on the formal training sector varied:

- Print media industry needs wholesome people, colleges offer front-end skills but not practical applications
- Managers need formal training; finance, marketing, business management
- Problem is that industry is too varied for institutions to address all applications
- Printing industry not seen as a profession, not taken seriously by education sector
- On the job training works; training providers do not have advanced equipment for simulation
- Training providers are often not in line with the international environment
- Most training is in-house
- In-house training makes companies less dependent on training institutions
- Some respondents referred to the SETA systems being too bureaucratic poor response to sector

11.2 Authors, journalists

11.2.1 Industry needs analysis

11.2.1.1 Existing occupations

Authors, journalists, writers operate mainly within the newspaper and tabloid printing industry. This occupation is for people who enjoy opportunities to engage with the world, and who like the unpredictable and to be constantly surprised

- Summarised the following occupations exist:
 - Feature writers
 - Freelance writers
 - Journalists
 - Specialist writers (business, finance, mining, construction, legal, etc.)
- Choice of reporting area impacts on career paths as requirements are increasingly different: from general informative or investigative writing to specialist writing (e.g. food or lifestyle section in newspaper)
- Writing for print media requires good writing skills combined with technical knowledge, e.g. computer literacy, as well as language proficiency
- Journalists nowadays travel all over the country or abroad, while technology gives tools for instant communications with the newsroom
- Writing good text remains the same: language is important, how to express yourself to an intelligent reader or a broad audience (e.g. political or crime issues)
- Instant news is available electronically. Journalists and writers find more information on the internet than in the past; however, this information may not have gone through thorough cross checking and verification. In the past, writers used books, which are more systematic and in-depth

11.2.1.2 Skills needs and gaps

Authors and journalists not only need skills, but also the right attitude due to critical readers and the need for responsible publishing

Attitudes and aptitudes:

- Curiosity and drive, interest in society
- Research attitude, dig deeper into issues
- Passion
- Highly adaptability and ability to work under pressure
- Deadline driven
- Attention to detail
- Focus

Skills needs (* indicates gaps)

- Language skills, from general language to specialist terminology and concepts*

- Reading ability*
- Writing skills*, expressing and communicating clearly and convincingly
- Word economy*, particularly for magazines and newspapers; ability to construct a story
- Specialist knowledge, in-depth, insight in subject of writing
- Basic sense of numbers, and economics as they impact on life
- There is currently a big gap between skilled authors, editors and publishers, and emerging ones
- Currently English and Afrikaans dominate, and there is a need for more competent African writers*
- Future will remain the same, but more freelance independent reporters will enter sector without sufficient competency
- Current training occurs mainly through English; there is a need for multi-linguistic material*
- General knowledge, multi-skilling for adapting to new assignments
- Legal understanding, to decide what can be reported, and what not; where do people have legal rights and recourse

11.2.1.3 Critical challenges

- Combine theoretical training with experience within working environment characterized by time pressure. Development of writing skills within deadlines
- To train critical skills on the job is time consuming. Companies don't set time aside for this purpose, particularly newspaper newsrooms
- Creating a competitive environment for training and internships, rather than measuring affirmative action targets
- Inculcation of work ethic in students particularly during transformation period when increased demand can lead to low quality products
- Press freedom brings moral and ethical challenges; what can be reported in the press? E.g. rape or murder cases involving minors; this requires some legal knowledge and restraint
- Get to know the new breed of readers: general news, business, finance, specialized fields or African languages
- Employ more African editors in large companies

11.2.2 Scarce skills

11.2.2.1 Hard to fill vacancies

Although there is an increase in people who want to write (some newspapers get 300 applications for each advertised vacancy), there is a need to address obstacles that prevent people from entering full-time work in established companies, or that prevent companies from appointing new staff due to the need to ensure the recruitment of quality writers. The following aspects of skills limit the filling of vacancies:

- In terms of writing quality:

- In specialized fields, lack of multi-lingualism is a problem
- Experienced journalists with investigative skills are scarce
- Ability to confirm facts and figures is rare due to general education
- Language:
 - Proofreading in various languages, particularly African
 - Translation from and to African languages
- Technical:
 - Advanced computer skills
- Content issues:
 - Improved general knowledge
 - Scarcest skills are technical writers and journalists, business journalists
 - Specialist knowledge of legal, constitutional issues

11.2.2.2 Changing skills profiles

Generally the skills profiles remain the same, but specialization brings more requirements for in-depth knowledge

11.2.2.3 Absorption rates

Print media industry is faced with a continuous tension between the need for more specialized and informed news articles, while having to absorb more writers who still have to learn on the job. The following trends were identified:

- In principle, access barriers to journalism are low, but companies use selection processes based on competency; if a journalist's articles are continuously reviewed with major editing, he/she is asked to leave the company. As labour laws make it difficult to fire weak reporters, people are appointed as contract workers or freelancers.
- Some respondents argued that in the past, newsrooms tended to be larger, with more advice from seniors and chances to learn on the job through mentorship. Others indicated that large print companies still have huge newsrooms
- There is little career guidance on the complexities and demands of the industry
- Particularly in scarce occupations, companies revert to headhunting, which leads to a circulation of the same people within a small industry

11.2.2.4 Scarce skills projections

- Future trends indicate an increase of African journalists who are not experienced or formally trained
- Increasingly, African writers should write in mother-tongue, as encouraged by government policies. This in turn requires an increase in editors/journalists who can understand African languages
- This also requires research skills training among new authors

- It requires publishing agency skills to mediate between the authors and the publishers.

11.2.3 Critical skills

11.2.3.1 Essential skills

As in the other occupations, skills are not everything. Without certain attitudes and aptitudes, skills training mean nothing. Some respondents indicated that the attitudinal aspect is as important as the skills one has.

- Ethical issues:
 - Professionalism, drive and self-motivation
 - Critical mindset and consciousness
 - Accuracy and eye for detail
 - Knowledge of copyright and plagiarism laws
 - knowledge of what not to publish; need for detachment; and not partisanship
 - historical awareness
- Skills:
 - Structuring of thoughts and ideas into a coherent text within the requirements of the specialist field and the parameters of the publication
 - Critical thinking, clear analysis, e.g. journalists reporting on SA problems
 - People tend to simplify, so to know how to retain some complexity of reality
 - Specialist journalists need research skills, e.g. how to access public information
 - interviewing skills

11.2.3.2 Match between education and training and skills needs

Respondents varied in their opinion about education and training. In some aspects existing training is considered of good quality. However, there is little linkage between the formal training and reality of newsrooms or professional writing environments. Some aspects are:

- Training for journalists is sufficient for a start, as long as the incumbent has passion, drive and self-motivation to learn some more outside the classroom.
- Few training institutions address the issue of language proficiency
- Most tertiary education institutions for journalism provide theoretical knowledge. Training providers do not address the reality in the industry, due to lack of knowledge about needs; lecturers should also regularly publish as editors
- Newspapers train on the job, but intake per year is too small to provide separate courses. They now revert to accepting unpaid interns who work for a few months and learn on the job
- There is a need for mentors who guide newcomers; mentors themselves must be trained for this role. Such courses are scarce

- There is a need for short courses to fill up gaps, but this is expensive for both the newcomers and the companies, unless they are sure of returns on this investment
- A number of institutions promote good writing, e.g. the New Foundation of Media Excellence and the Institute for the Advancement of Journalism

11.3 News editors

11.3.1 Industry needs analysis

11.3.1.1 Existing occupations

- This occupation consists of
 - Group Editor-in-Chief
 - Managing editors
 - Sub editors (Subs) / Copy editors,
 - Editors of various beats & sections (e.g. supplement)
 - Editor/ Editor-in-Chief
 - Layout artists who edit visual material
 - Photographers & Picture Editors
 - Manuscript Administrator
- Functions have not changed drastically. Main difference is at a technological level, e.g. global communications, and the influence of the political environment and ownership on content and selection of reports
- Depending on company, whites still dominate editing in the print media sector, but young black editors are increasing in number. This led to juniorisation of editing teams, i.e. younger editors with less experience but with the same or more responsibility. On the other hand, the newspaper with the largest sales is nowadays for the black market: the Daily Sun; also the Sowetan has a huge readership; both newspapers have mainly black editors

11.3.1.2 Skills needs and gaps

In general, participants indicated that skills requirements are the same as they were three decades ago: ordering texts from writers, writing of editorials, language skills, inquisitive nature, and 'general/broad frame of reference'.

However, other participants indicated that this was only partially accurate as editors now require more management skills owing to the demands of bigger newsrooms. This, in addition to the standard requirement that editors of magazines be experienced journalist (across beats).

Respondents indicated that the requirements for editors of magazines and newspapers are different. Newspaper editors have much to do with ethical questions, e.g. what to publish. Examples are rape and murder of minors; political analysis that can be used in libel cases; editors increasingly require legal knowledge

In general, the following skills needs were identified:

- Language skills:
 - Language proficiency (especially in language of publication)
 - Requires professional qualifications if editing specialist texts
- Writing skills:
 - Research skills
 - Ability to construct stories
 - Multi-tasking/('multi-skilling' to write across mediums (mobility across video reporting, radio-video reporting etc)*)
 - Specialised writing: finance, business
- Editing and managing skills:
 - Copy editing
 - Critical thinking, showing own opinion
 - Newsroom management – need to manage larger teams than before, e.g. in newspapers with large readership; new management styles, e.g. team management
 - Ability to plan work and delegate
 - Sticking to the truth, and defending it
 - Handling difficult reporters
- System knowledge:
 - Circulation promotion skills – requires marketing knowledge (especially important with the move of newspapers, tabloids and general magazines to go online, and with increased subscription requirements)
 - Feel for markets
 - Global knowledge and awareness, beyond the immediate environment
- Technological skills:
 - Online skills – all media houses have IT specialists, but what is needed are media professionals with good online research skills*.
 - Sub editors now require electronic layout and design skills, digital production
 - Technical skills for design staff
- Ethical awareness:
 - Self awareness; self management; economic communications to audience, networking
 - Knowledge of legal aspects, e.g. legal restrictions on publishing news; legal rights and recourse

11.3.1.3 Critical challenges

- Transformation
 - Transforming the industry to include African editors
 - Desire to write for public has increased in society, there is a need for guidance to write good material; editors have to play an educational and mentoring role
 - Lifestyle changes in South Africa require new approach to reporting
 - Technological innovations, e.g. website communication

- Capacity:
 - Find enough editors that provide content for magazines and for circulation
 - Editors need training in research methodology to guide authors
 - Editors training to be structured better, currently entry is just a career step from journalist to editor
 - Another respondent suggested newsrooms are still filled with junior staff and few seasoned journalists. This was especially the case in regions like the Eastern Cape and KZN
 - The issue of poaching was again raised as critical, which was connected to fame achieved through bylines.
- Work environment:
 - Instilling integrity, honesty, fair play; future of newspaper companies, e.g. ownership, threatens integrity of editors

11.3.2 Scarce skills

11.3.2.1 Hard to fill vacancies

- With regard to content:
 - Commissioning editors
 - Black sub-editors and editors
 - Specialist editors, e.g. for medical and pharmaceutical, architecture. elections, mathematics/science issues, outcomes based education
 - International reporting
 - Good Features writing
 - Investigative writing
 - Political writing
- Technical:
 - Advanced computer skills, particularly for specialist magazines
 - Designers
- Editorial:
 - Proof readers
 - Layout sub editors
- Ethical:
 - Passion and dedication in view of long hours, tight deadlines, no exposure, or glamour

11.3.2.2 Changing skills profiles

- One example of skills profiles changing is in the large print media where companies have recently migrated to an electronic digital 'press' system. Unfortunately, the concomitant result is that the newspaper requires fewer layout subs as it now takes 30 minutes to do the whole layout of the newspaper; on the other hand this requires specialized IT skills
- There are increasing shifts towards different media and the sound and visual skill requirements necessitate a mind shift.
- Technology is impacting on industry – although online hasn't impacted the newsrooms significantly, contrary to what was

thought. There is a move towards online journalism and thus a need to keep abreast of developments and to up-skill accordingly.

- Photographers for instance now must have digital skills and journalists are no longer just print reporters, but need to report for online media as well (video reporting, radio-video reporting etc). Photo-editors must have a solid knowledge of what is possible with current technology
- There are differences in reporting across media and journalists need to adapt accordingly. This requires training and experience.

11.3.2.3 Absorption rates

- Rates are low due to need for specialist knowledge and reluctance of newcomers to enter slow career path
- Companies are able to identify good candidates through internship and/or learnership programmes, which allow for mentoring for bright talents and developing 'succession plans'
- Generally people start as a Cadet (junior/cub Reporter); move to Reporter; then across beats, the Senior Reporter the Editor of specific beat (e.g. Investigative Editor, Political Editor), then Deputy Editor and/or Editor
- Newcomers prefer the glamour of journalism rather than sub-editing
- Entry is virtually guaranteed for black applicants, but there is a trend of horizontal job-hopping at journalist level. This is related to the issue of poaching. Lateral movement is easy in large companies, e.g. Johncom; *Sunday Times* to *Sowetan* to *Business Day*
- According to some respondents, new entrants need formal training – entrants with formal training are more readily absorbed into industry than those with non-formal training.
- Journalism training is thus critical to entry. The print media sector generally does not hire people without formal training.
- Media 24 did a test case in 2006 – they took people without formal training and put them through learnerships. This didn't go too well.
- Journalists with formal training – and those who are younger - move quicker through the ranks, and across electronic and print media

11.3.2.4 Scarce skills projections

- Sub-editing: This is particularly evident as people prefer not to work long hours, under pressure, with tight deadlines, and without a byline, which means not exposure and fame (as compared to journalists)
- Good journalism: At least one participant indicated good journalism (which is about ethics, morality and the ability to write) is a scarce skill, and the pool for new editors is small.

11.3.3 Critical skills

11.3.3.1 Essential skills

This largely coincides with new and scarce skills.

- Language:
 - Language use
 - Translation
- Editing:
 - Proof reading
 - Communications/contact making
- Writing:
 - creative skills
 - specialisation and general knowledge of industry
 - Storytelling
- Technical expertise:
 - Online skills
 - Digital skills (most junior staff seem to have these skills)
- Management
 - Newsroom management
 - Maintaining contacts – general knowledge to know how to make contacts
- General knowledge as frame of reference
 - Multi-skilling across media
 - General Knowledge (most new entrants lack a ‘general frame of reference’)

11.3.3.2 Match between education and training and skills needs

- The majority of respondents indicated that training institutions were important but only provided basic skills, hence the various print media houses tended to have in-house training programmes for new staff in order to meet their specific needs.
- Respondents were generally of the opinion that new entrants were equipped with a sufficient theoretical framework. However there are problems on the practical side – especially in terms of language proficiency, news writing and the ability to construct (different/angled) stories.
- Magazines editors preferably need to go through newspaper route to learn time management, deadlines, focusing on facts. There is a real need to combine theory with practice during training.
- All participants felt training needs to address language capabilities and the quality of copy in general. It must be geared towards training in more than one media so that reporters are able to adapt to radio or video.
- The critical challenge is the capacity to deliver journalists that help South Africa deal with its history.
- A welcome development is an attempt by an institution of Higher Education to introduce a course on Reporting Africa.
- Finally, one of the interviewees listed a computer programme which was developed to help a print media house screen

potential new journalists. It was suggested this test, designed by Brian Dyke and Peter Sullivan be evaluated for possible replication/reproduction

11.4 Managers of graphic design studios

11.4.1 Industry needs analysis

11.4.1.1 Existing occupations

- Main occupations are:
 - Graphic designers,
 - Cartoonists,
 - Illustrators
 - Layout specialists
- Entry into this sector by Africans was affected by apartheid, as most blacks did not have access to art education and training
- Nowadays, there are more opportunities for freelancing through cheaper technology
- Many design studios are one-man businesses
- Good studios can become branding consultants for clients
- There is the impression of job reservation for more experienced entrants and a lack of black designers

11.4.1.2 Skills needs and gaps

- Creative skills:
 - Creative ability, visualizing of concepts and ideas
 - Good artistic talent and techniques
 - Creative eye for new expressions
 - Passion for work as creative product, not high income generator
 - Build-up of portfolio shows creativity and artistic skills
 - Whites had art training at school, having a major advantage over African entrants
- Technological:
 - Nowadays, less manual talent, and more digital based
 - But visualization remains a skill based on aesthetic judgment
- Management:
 - Art directing, not only art production, as the product is part of a full production chain
 - Need time management, customer requirements are specific
 - Having own company gives freedom, but requires number of business skills
 - This is a real service industry which requires personal interaction skills

11.4.1.3 Critical challenges

There are some critical challenges in the industry:

- Competition due to technology availability, so one has to be more than an artist, be on top of management of the studio and really serving client needs

- Advanced technology offers opportunities, but restricted broadband gives limitations in communication

11.4.2 Scarce skills

11.4.2.1 Hard-to-fill vacancies

The following are some hard-to-fill vacancies:

- High-end retouching of products requires excellent technical understanding of colour and to perform miracles
- In large companies, designers become DTP operators; but most want to be graphic designers which has more artistic flavour
- Person knowing both design and the printing world at large, to determine how art works fit the total product (e.g. book, magazine, poster)

11.4.2.2 Changing skills profiles

- Graphic design has become part of larger array of visual communication means, such as 3D, film, video, audio. This demands skills in all areas within one studio. Managers manage variety of platforms and software programmes that are used for communication and production
- Technological innovations require higher-end skills, and good judgment.
- Technology gives software that repairs itself; designers are guided by software and postscript computerized printers do colour management
- The sector is highly competitive, keep up to date with developments and life-long learning
- Diversification makes the manager a consultant, advisor, branding expert and team manager
- Focus on communication, interpersonal relations with clients
- Artist has to know all programmes: Quark, InDesign, DPP, Photoshop, to ensure communications with other designers using different software can be maintained

11.4.2.3 Absorption rates

- There is no scarcity of skills as much training is available in IT, multimedia
- Companies look for new blood to address drive for innovation in the print sector
- Most companies use recruitment agencies that know their clients' needs well
- Experienced designers enter through word-of-mouth and portfolio submission
- Designers and managers have to build up portfolios and sell themselves
- Newcomers are responsible for acquisition of basic knowledge

11.4.2.4 Scarce skills projections

The sector is unpredictable. There is a steady inflow of talented designers, and those with management skills will end up with senior jobs at companies, if they don't want to freelance'

11.4.3 Critical skills

11.4.3.1 Essential skills

- Creativity, innovation
- Problem solving in a creative way, but for client needs
- Client liaising.
- Costing of production process
- Administration
- Professionalism
- Understand the discipline within the broader company system

11.4.3.2 Match between education and training and skills needs

- Most respondents agreed that formal training gives most skills necessary for the graphic studio
- There is a 5 year apprenticeship, but it should be reduced to 2 years
- Private training providers often have old equipment, obsolete software
- Most training is too theory based; need practical experience
- Education hones talent, but implementation is the key
- Training institutions give theory, workshops ask for experience; but variety in the sector is wide; job availability determines what you need
- Colleges have set programmes, without internships
- Some training providers directly link to recruitment agencies that serve companies
- Problem of DPI: no access to art classes at school, no hard and software. Low exposure to requirements of sector
- Internships can help intern artist to shadow manager at work
- Companies should partner with training institutions, HEI, schools and influence the training

11.5 Technical staff, production

11.5.1 Industry needs analysis

11.5.1.1 Existing occupations

- The following are typical occupations in this sub-sector:
 - Managers of printing workshops
 - Production officer
 - Lithographers, planography operators
 - Machine printers, finishers, pre-press maintenance; compositors, binders, screen printers, small offset, printing table operators

- Technical sections move from digital to thermal and laser-based printing
- As a result, the workplace has changed from a dirty workshop to a laboratory
- Technical work is less labour intensive due to use of sophisticated machines
- As a result, there is increased professionalisation with good salaries; high-end production leads to high paying jobs, priority careers
- This requires ongoing training or you become redundant
- It takes at least 7 years for professional status, management level
- One result is a reduction in the labour force

11.5.1.2 Skills needs and gaps

- There have been major moves from mechanical machines to computerized production. This requires different machine management and operations, and retraining or additional training of staff
- Technical staff needs to be colour sensitive and visually well-disposed
- The pre-press work is not outsourced so often anymore, and large companies open their own section
- Litho and other technologies are still used in the small companies, but larger ones become more digitally sophisticated
- Bookbinding is mechanized nowadays
- Technical staff have to adapt to service orientation
- New technologies are software driven, such as flexographic machines; programming of machines; this advantage also makes the turnaround time tighter
- New technology changes colour matching to automation, but it still needs experts to take decisions
- New repair technology allows SA companies to have their machines fixed from Germany via satellite
- No training courses are offered for pre press in the new environment, while it is the conduit between creative people and the factory

11.5.1.3 Critical challenges

- Find new generation of managers, skilled in both management and technology, and the full production cycle
- Market the technical trade as a profession to attract talented people
- Develop training that addresses needs of the industry rather than generalized knowledge

11.5.2 Scarce skills

11.5.2.1 Hard-to-fill vacancies

- The industry itself is generally experiences shortages of scarce skills; e.g. post office and government printers are no longer functioning well due to scarcity of skills
- Pre-press operators
- Press operators
- Computer (IT) trained plate makers
- Machine operators/minders/Machinists
- Binding/finishing-different form printer to printer
- Folders, binders, colour specialists
- Machine operators who can work in a mechanized environment, give due attention to detail, have mechanical skills, work under pressure, take care of equipment, have good colour perception. Some companies import skills from India
- Front office skills to ensure linkages with graphic studio and production units, and clients
- Large companies attract high skilled technicians, but small companies cannot afford them

11.5.2.2 Changing skills profiles

- Technology:
 - From mechanical to digital to laser production
 - Material that is used changes from pulp to plastic forms
 - Multi-skilling: e.g. finesse, colour and productivity; maintenance and printing by the same people
 - More photography driven, images from concepts, digital imaging
 - Need for compression technology
- Products:
 - Range is wide, from telephone directory to money printing
 - Re-purpose content for different communication and media platforms
- Training requirement changes:
 - Existing technicians easily adapt, work with manuals
 - Older tradesmen to be retrained
 - New entrants to acquire skills

11.5.2.3 Absorption rates

- Recruitment:
 - Mainly through advertising or agencies (large clients)
 - Through word-of-mouth, juniors shadow senior person for 2 years or apprenticeship
 - most come from factory background
- Retention:
 - No job is guaranteed; not secure unless you are experienced
 - Printing to be seen as a professional career, attracting young entrants

- Salaries for operators not competitive, thus go to manufacturing
- Careers remain within print industry, technicians move to other companies
- Mentoring and training in-house
- Accept that many trainees will leave company and move to others in sector
- This is a demanding occupation, with more than 8 hours a day work; newcomers can seldom cope with these demands

11.5.2.4 Scarce skills projections

- Scarcity will increase due to lack of attraction, lack of knowledge of the sector and need for advanced technological skills

11.5.3 Critical skills

11.5.3.1 Essential skills

- Problem solving, multi-tasking, deadline-driven, logistical planning
- Basic mathematics is a requirement, not provided in non-formal training
- Colour understanding, more art than science, e.g. skin tone to be natural
- Understanding ink on paper, is value decision, requires high skills
- Managers need to be creative, not technical only, step out of the box for innovative solutions
- Ability to adapt to new challenges, techniques
- Ability to think on the ground and make timely decisions
- Meeting deadlines

11.5.3.2 Match between education and training and skills needs

- Basic training by officials providers such as Cross Media Print College is sufficient as a start
- SA training providers don't know the industry; the best trainers are those working in industry'
- There is a need for trainers to consult more regularly with the industry
- Outside training is often based on outdated equipment, making candidates redundant even before they are employed
- Higher Education and Training and Further Education and Training institutions provide theoretical training
- Colleges focus on creative side, not production training
- There is a dire need for practical experience
- Much training is offered by product supplier/dealer of machines, in-house delivered
- Untrained people enter, are groomed and skilled by technical managers and supervisors who are more experienced
- Rather test people and give additional training
- On the job training becomes specialist function in larger companies

- Media24 had training facility with MAPPP-SETA, this was not sustainable
- Major institutes send staff to international seminars, workshops
- Certain makes and brands require specialist training

11.6 Sales experts, marketing

11.6.1 Industry needs analysis

11.6.1.1 Existing occupations in the industry

Depending on the size of the organisation, the following occupations exist:

- Junior Telemarketer
- Senior Telemarketing
- Section Head: Services (dependent on number of staff)
- Section Head: Vacancies (dependent on number of staff)
- Section Head: Property (dependent on number of staff)
- Estimators
- Sales Rep – going out to see customers
- Sales Managers
- Branch Manager

Managers in this sub-sector have a variety of tasks:

- Quoting, budgeting, mentoring small businesses
- Secure sales, corporate deals, tenders, accounts
- Manage staff in sales and marketing section

Managers deal with:

- Recruiting of newcomers in section
- Keeping track of changes in technology; innovation
- Retain insight into price competition, updated on daily basis on price fluctuations, import prices
- New technology, selling through networks worldwide

11.6.1.2 Skills needs and gaps

As with most departments in the print industry, people in marketing must have the right personality and passion, and knowledge of people. In terms of skills the following is needed:

- People skills
 - All people entering this business must have knowledge of the whole business; this gives confidence when dealing with clients
 - Due to stiff competition from China and India; a wide knowledge is required of what the company can offer
 - Communication skills
 - Little advantage in having formal qualifications, except at manager's level

- People's skills:
 - Increase sales through building trust and mutual understanding
 - Cultural diversity skills, especially with new leadership in government
- Organisational and technical skills:
 - Credit and risk management, analyzing metrics on total profitability, corporate cost-cutting
 - Requires special technology and materials; must speak to global branding

11.6.1.3 Critical challenges

- Find people with right aptitude
- Retain people with experience
- Prevent poaching, particularly of African managers
- Adapt to changes in technical fields, innovation for competitiveness
- Local managers etc are needed due to the increase in local tabloids. Few experienced sales and marketing people live outside cities

11.6.2 Scarce skills

11.6.2.1 Hard-to-fill vacancies

- High level deal making to secure large tenders or accounts
- Sales section is not a preferred position; no glamour; departments are pressurized for high turnover and fast delivery at outlets
- One of the most difficult roles in business; People sell to people, identify potential clients, special courses needed
- Difficult to find procurement managers, as no formal training exists for this occupation

11.6.2.2 Changing skills profiles

- More competitive people will be hired, those who can really sell or market company products and services;
- Trend to start outsourcing the sales component to advertising agents

11.6.2.3 Absorption rates

- Recruitment is mainly through advertising of posts with specified criteria
- Industry is growing, needs more sales people
- Careers are generally secure for successful sales and marketing persons
- New entrants without experience cannot progress; this is a competitive sector
- The new trend is fast-tracking of careers within the company or outside. The disadvantage is that people do not get to know the

whole company, and struggle to market its various departments and services

- One problem is that experienced people leave industry after specialization
- Companies retain specialists through good salaries
- Career possibilities are also overseas

11.6.2.4 Scarce skills projections

- There are few experienced sales people

11.6.3 Critical skills

11.6.3.1 Essential skills per occupation

- People skills, sales skills, communication, negotiation skills
- Product knowledge, deal packaging
- Technical skills, to know what product can be offered to address clients' needs

11.6.3.2 Match between education & training and skills needs

- One needs no formal training to become a sales representative or marketing person
- Customer management is based on flair, comes with experience
- Cross Media College has a progressive sales programme, but not unique and competitive
- Trainers have not been trained as trainers
- Training providers don't provide for specialization and technical skills. Too much focus on soft skills
- Most training at colleges and consultants is generic, not tailored for marketing industry
- Training providers tend to react to public sector initiatives in training, not the sector itself
- In the past, apprenticeships were sufficient
- Most training takes place in-house, with seniors mentoring newcomers

12 Conclusions and recommendations

The above report is characterized by the density and detail of information. It is clear that the sector is willing to share its experience and insight. Some general trends became apparent, which are summarized below, with recommendations on their impact on future planning or implementation of training.

12.1 Role of MAPPP-SETA in the sub-sectors

- Although the larger companies knew the MAPPP-SETA and its contribution to the sector, there was a general criticism about low visibility of the SETA, and low value of its contributions. This was also visible in the problems around the use of the SETA's database. Many of the addresses and contact persons or names

were obsolete. It is recommended that the SETA update its database more regularly

- More important is the need for the SETA to make itself visible to the medium to lower categories of companies. In many cases, only the HR manager knew something about the SETA. It was recommended that the SETA organizes more short courses and workshops/seminars/ conferences on issues that are really problematic in the sub-sectors
- Many participants and respondents asked a copy of the report. It is suggested that the report be made available as soon as possible.
- There was a general appreciation of the technical training provided by the Cross Media Print College. However, there seems to be a gap between the training and the various needs of the sector, particularly with regard to modern technologies and machinery.

12.2 Diversity of the sub-sectors

- The sub-sectors Publishing and Print Media are characterized by high variety and differentiation. One finds companies with over 1000 staff members to one-person businesses, such as freelance graphic designers. Many print businesses have fewer than 10 staff members. This variety poses challenges to training providers with regard to basic education and training, learnerships, training programmes and short courses.
- Significant varieties were apparent in respondents' opinions and views, which were often highly contrasting, depending on the individual's experience. Some managers claimed that it was not hard to fill vacancies, others referred to critical shortages in the same occupation. Some spoke about massive changes in the industry, while others claimed that this was only technological.
- In terms of the markets, a similar variety exists, from national newspapers and magazines to labels and greeting card production. One finds differences and similarities between some sub-sectors, such as newspaper publishing and book publishing, in terms of content and print quality, while both make use of journalists, specialist writers and editors.
- Under the present circumstances, the information cannot be validated quantitatively or statistically, but there are a number of recurrent themes and trends which will be discussed below.
- Most participants felt the skills profiles were not drastically changing and that, in general, the same skills are needed in the areas of management, editing, design and marketing. The change that did occur was technological change, which necessitated staff being computer literate and keeping abreast of developments. The implication is that training for the sub-sectors in general needs to include computer literacy, with specialist courses for certain occupations (e.g. graphic design).

12.3 People with disability and work opportunities

Few respondents discussed the potential of people with disability to enter a career in the publishing and print media industries. Employment of people with disabilities is often determined by the nature of the disability. Workshops are seldom designed for access in wheelchairs. Occupations where colour matching and visual planning is important do not allow for entry by blind people. Machine operators have to be able to move around with ease, while field reporters and managers in SMEs need mobility. On the other hand, the move to digital production offers enormous opportunities to people with disabilities. There are opportunities in the following areas:

- Writing, as this is usually done on computers, which allow people with physical disabilities to work. This also includes internet-based journalism which does not require mobility
- Journalism among people with the same disability; e.g. the use of sign language by persons with hearing disability.
- Editing and sub-editing, which is also usually done on computers
- Creative design
- Photography
- Tele-marketing

12.4 Market development

With regard to market development, in both sub-sectors respondents regularly referred to the following observations and their implications for occupations:

- The main drive of the sub-sectors is the satisfaction of existing and/or new markets. The industry is a service industry with a focus on information dissemination for a number of purposes, e.g. reporting on political, social and economic development, sport and recreation, education and training, sales and promotion, etc. The dynamics of these purposes are reflected in the media and the way these media are produced. Many respondents referred to the need for multi-media awareness, such as SMS, DVD, audio-visual, e-mail and internet provision. Training for such occupations must include building sensitivity for these media and ability to manage diversity and dynamics with sufficient understanding of the nature and potential of the media.
- Dynamics in the markets led to shrinkages in work for a number of years, but recently, markets are expanding in all directions, albeit that the expansion is often using new technologies. The shrinkage led to a decrease in posts, and particularly a low intake of new entrants. The expansion requires many more experienced workers, who are not available due to the earlier shrinkage. Part of the solution lies in multi-skilled training, including entrepreneurial skills, which allows entrants to adapt to alternative posts or start their own business or freelance.

- New market niches are explored in an ongoing way in the sub-sectors. E.g. specialist magazines, community tabloids, subscriptions to email and internet, and tele-sales. Most companies consider in-house training or internships as more effective than formal training, although many respondents emphasized the need for formal training that introduces the diversity of the markets to students, if only to enable them to plan their career better.
- The focus on market satisfaction has implications for the occupations. Markets are generally profit-driven while many writers and editors focus on professionalism, ethics and deadlines. The profit-driven nature has at least two implications:
 - Low remuneration for entrants as their inexperience limits their added value to the publication
 - High remuneration and a secure career for experienced people, particularly in occupations where appropriate skills are scarce.
- Within the global market system and underdeveloped local markets, book publishing is highly vulnerable, and requires special skills for companies to make profits. Respondents indicated that there is a need for better government policies that affect book publishing, e.g. selection and procurement for educational sector and for the promotion of a reading culture.

12.5 Other aspects of the sub-sectors

Besides 12.2 -12.4 the two sub-sectors appear to be characterized by the following:

- Delivery focused, with tight deadlines putting much pressure on staff retention
- Quality-driven to satisfy the requirements and demands of the clients and readers, requiring work ethics and above-average production skills
- Profit-driven to satisfy owners and to be able to retain experienced workforce
- Competitive, as existing companies expand their production to provide a holistic service, increasingly new companies are started (with more advanced or cheaper technology) and large companies (in other sectors) start their own publishing or printing departments
- In terms of their management, companies are increasingly people-centred with regard to:
 - Client interaction, focusing on interpersonal relationships that may lead to increased orders/accounts
 - Management of staff, focusing more on leadership by example, buy-in and encouragement of staff into new approaches, and cultivating a 'family' environment rather than a workforce determined by production statistics.
- Multi-cultural and intercultural nature of the work environment, with regard to:

- Workforce, with increasing numbers of Africans (PDI) into all occupations and ranks, which requires a multi-cultural management style
- Clientele, ranging from government officials to readers, which impacts on use of language and cultural frameworks. This requires staff that is familiar with other cultural communities and languages
- Juniorisation of many occupations in the publishing sector, due to:
 - Shortage of skills and experience due to high staff turnover in certain occupations, e.g. journalists, editors, graphic designers
 - Adherence to AA and BEE policies, providing entrance to people who have not yet had a chance to build up experience
 - Juniorisation generally leads to decrease in continuity (due to job-hopping and poaching of PDIs) and quality (due to limited experience)

12.6 Basic attitude, aptitude and skills needs

The nature of the sub-sectors leads to basic attitude, aptitude and skills requirements, which are often not fulfilled through existing training. Some of them are acquired through formal training, others through practice in the workplace.

- The following attitudes are required to address the challenges of the sub-sectors:
 - High work ethic as shown in commitment, loyalty, quality contribution and sticking to agreements
 - Creativity, with regard to solving problems, innovative thinking and planning, new products and processes, positive surprise element in products, and exciting services
 - Entrepreneurship, with regard to finding best ways to deliver services or products, contribution to increased delivery and opening of new markets
 - Attention to detail, to ensure that the worker's contribution fits the total production chain in the best way, and with appropriate finesse
 - Emotional maturity, as shown in interpersonal relationships, ability to work under pressure and reflected in the products and services within a general social relationship framework
 - Accountability for one's actions, be it in terms of production or interpersonal relations
- The following skills were mentioned as important in most occupations in the industry:
 - *Language proficiency*, primarily English and Afrikaans, but increasingly in African languages, in the publishing sector (text books, recreation, journals, magazines) and in printing (advertising)

- *Structuring one's thoughts*, particularly for those who deal with planning and communications, e.g. managers, writers, editors, marketing and sales people
- *Specialist skills*, in view of the increase in niche markets and specialization of publications. For example, several respondents indicated that it would be better first to qualify in a specialist areas (law, health, construction) and then take courses in writing and editing
- *Multi-skilling* (particularly in small companies) in order to take responsibility for several occupations or tasks
- *Communication* (interpersonal and writing) for internal functioning and relationships to clients and audiences
- *Time management* to ensure efficiency in contribution to full chain of production or service delivery
- *Networking* in order to get access to relevant information, build relationships with others within or outside the sub-sector, and expand markets
- *Computer skills*, from general Word processing to advanced machine tending
- *Research skills* to ensure valid and reliable information on subjects or markets is acquired and processed

12.7 Critical and scarce skills

The following critical and scarce skills were identified in the various occupations

12.7.1 Publishing

- Management:
 - Entrepreneurial aptitude and skills
 - Financial management
 - Multi-cultural management
 - People-centred management
 - Change management
- Authors, technical writers, journalists:
 - Language proficiency (writing, reading)
 - Research/investigative through electronic, verbal and published sources
 - Sense of numbers
 - Creative ability to construct story with word economy
 - Ethical maturity
 - Specialist writing, e.g. legal, health, construction, politics, technical, business
 - Afrikaans language proficiency
 - African languages proficiency
 - Sign language and Braille
 - Time management
- Editing:
 - Economic writing skills
 - Newsroom management
 - Special subject editing, particularly sub-editors

- Proof reading
- Editing, sub-editing and proof reading in African languages
- Copyright enforcement
- Translators
- Illustrators, graphic designers, photographers:
 - Artistic and creative communication of concepts through visuals
 - Layout
 - Knowledge of full production chain in publishing (end-product orientation)
 - Awareness of global trends
 - Specialist areas illustrations
 - High quality imaging for African language groups
 - Entrepreneurship for freelancing
- Marketing:
 - Communication skills
 - Entrepreneurial
 - Use of new platforms, such as tele-sales
 - Subscription recruitment
 - Online skills
 - Knowledge of full chain process

12.7.2 Print media

- Management
 - Knowledge of industry sector
 - Financial management
 - People-centred management
 - Procurement management
 - Entrepreneurial flair, business logic and negotiation skills
 - Passion
- Graphic design studios
 - Creative ability to visualize concepts
 - IT conversant, with different platforms and software
 - Colour sense
 - Client liaising
 - Costing and time management
- Technical
 - Pre-press operators
 - Press operators
 - IT conversant
 - Time management
 - Basic mathematics
- Sales and marketing
 - Communication and negotiations
 - Passion
 - People skills
 - Intercultural interaction

- Knowledge of full production chain
- Costing and estimating

12.8 Training in the Publishing sub-sector

In general, respondents indicated that

- Most occupations required a professional/academic training as a general basis for performance.
- This was even more applicable to specialist occupations, such as, journalists, specialist writers, graphic design and editing
- Entrants into formal education should be properly informed on career opportunities.
- Persons interested in a career in publishing should preferably start with a first degree specializing in areas such as law, medicine or economics, and then take journalism training
- In-house training was generally more effective for production, as experience and mentorships linked theory to practice
- In-house training should be complemented by short courses and seminars
- Improvement of formal training would have to provide opportunities for practical experience
- Formal training needed a holistic approach, combining practice and theory, and placing the occupation within a total production chain framework
- Formal training should adhere to performance criteria that are accepted in the industry
- There was an ongoing need for placements and internships, but selection or recruitment procedures were often problematic

12.9 Training in the Print media

Respondents indicated that

- In-house training and apprenticeships are still the most effective ways of learning print trades
- In-house training should be complemented by short course, seminars, etc.
- Formal training should expose students to the most up-to-date technology and machines for simulation
- Training should be holistic and place the specific occupation within a total business chain.
- The sub-sector has to promote the occupations among youth to attract a new workforce

12.10 Conclusion

The research provided an overview of existing occupations, critical and scarce skills and general trends in the Publishing and Print Media sub-sectors. Responses from the industry varied considerably, due to the differences in size of companies and their share of the market,

and the different experiences of respondents in their own careers and workplace. It is clear that the two sub-sectors have gone through considerable change over the past decade, particularly with regard to technology and market diversification. On the other hand, those who were seniors in their companies, representing the majority of respondents, indicated that the right person with the right attitude, aptitude and skills could find a secure job in a dynamic sector. Clearly, there is stiff competition between companies due to skills shortages in most occupations, which allows for faster careers in a variety of companies. On the other hand, the sub-sectors are highly competitive and demand the maximum skills and commitment from staff. In this regard, the sub-sectors are similar to most sectors in a growing economy such as South Africa, with its legacy of a population that has received weak or no education and training, and which has a low level of entrepreneurship and business acumen. Besides the basic skills needs that formal training can offer, specialist training at an advanced level is required, preferably before entering the industry. However, such advanced training should have a practical experiential component, such as in learnerships. With the need for specialist formal training as a start, the next step would be logically to provide placements and internships to as many promising graduates as possible. In this way, a sufficient pool of knowledgeable, committed and experienced workers will be available to this expanding sector.

ANNEXURE A

LIST OF RESPONDENTS

| | Name of respondent | Company name | Company department | Size of company L = Large M = Medium S = Small |
|---|----------------------|------------------------------|---|---|
| Managers of publishing companies | Marie-Louise McLaren | Puisano Business Development | Head of Media Relations & Human Resources | S |
| | Tshaks Masemola, | Umgangatho | Publisher | S |
| | Sammy Naidoo | On Time Printers | Media | S |
| | Jason Muller | Independent Photojournalist | | S |
| | Richard Booysen | Cape Printing (Pty) Ltd | Print Shop Foreman & Manager | S |
| | Asher Abitz | Albion Press (Pty) Ltd | Managing Director | S |
| | Gerard Garner | Brooke Patrick Publications | Publisher & Director | M |
| | Gerard Robinson | DALRO | Copy Right Manager | M |
| | Natasha Bothma | Succeed Magazine | Manager/Editor | M |
| | Gerald Garner | Brooke Patrick Publications | Manager/Editor/Sales & Marketing | M |
| | Ilyana van Tonder | DALRO | Publisher | M |
| | Anelda Schreuder | Carpe Diem | Human Resources & Office Manager | M |
| | C Tonkin | Touchline Media | | M |
| | Greg Clarke | Omega Art 2000 (Pty) Ltd | Print Press & Litho Dept. Manager | M |
| | Kneale Caine | Trident Press (Pty) Ltd | Financial Manager | M |
| | Themba Molefe | SOWETAN | Manager/Dep. Editor | L |
| | Colin Pretorius | Paarl Post Media (Pty) Ltd | Print & Production Manager | L |
| | | | | |
| | Rhoo de Odendaal | Van Schaik | Publishing Dir. | L |
| | Solly Mkgehle | JohnCom | HR manager | L |
| Government | | | | |
| | Leah Madalane | GCIS | Director Training Services | L |
| Union/networks | | | | |
| | Nhlanhla Ngubane | Publishers Association of | Publishing Director | L |

| | | | | |
|--|----------------------|----------------------------------|---------------------------------------|--------|
| | | SA (PASA) & Heinemann Publishers | | |
| | Faiza Abrahams-Smith | MISA-SA | Consultant | S |
| Editors, copy readers, sub-editors, commissioning editors | Edward Tsumele | Tsumele Publishing | Editor/commissioning | S |
| Editor/Publisher | Russel Martin | Juta & Company Publishers | | S |
| Managing Editor | Marc de Chazal | Today Magazine | | S |
| | Vuyani | Isizwe News | Founding Editor | |
| Assistant Editor | Bronwen Dyke | Big Issue | | M |
| | Janet Heard | The Argus | | |
| | Mathatha Tsedu | City Press | Editor | L |
| | Michael Loewe | East Cape News Agency | Founding Editor | L |
| | Gavin Stewart | The Daily Dispatch | Editorial Consultant | L |
| | C Madlala | Umafrika | | L |
| | S Jones | Natal Witness | | L |
| | D Chetty | Univ of KZN | Corp Comms | L |
| | Peter Sullivan | Independent Newspapers | Group Editor-in-Chief | L |
| | Themba Molefe | SOWETAN | Editor | L |
| | Victor Mecoawere | SOWETAN | Sub-Editor | L |
| | C Madlala | Umafrika | | L |
| | Guy Rogers | The Herald | Sectional Editor | |
| | Sam Mkokeli | The Herald | News Editor | |
| | S Jones | Natal Witness | | L |
| | | | | |
| Authors, technical writers, journalists | Marlin Padayachee | Green Gold Africa Communications | | S |
| | Anon | KZN Industrial and Business News | | S |
| | Palesa Mazamisa | IBOVU RED OCHRE PUBL. | Journalist/technical writer /manager/ | S I |
| | Thembeke Dlungwane | Independent | | S |
| | Edward Tsumele | Freelancing | Journalist | S |
| | | | | |
| | Damain du Toit | Rising Sun | | M |
| | Victor RW Mecoawere | SOWETAN | Journalist/manager | L |
| | M Challenor | Univ of KZN | | L |
| | Osita Ezeliora | Wits University | Author/trainer | L |
| | Louise Grantham | Wits University | Trainer/manager | L |
| | Themba Molefe | SOWETAN | Journalist/trainer/m | |

| | | | | |
|--|----------------------|--------------------------------------|-----------------------------------|---|
| | | | anager | |
| Journalist | Michael Morris | Cape Argus | | L |
| Journalist/ Feature Editor | Samantha Page | Opera | | L |
| Journalist | Karen Breytenbach | Cape Times | | L |
| | Lorraine Cohen | The Herald | Deputy Chief Reporter | |
| | Nicky Williamse | The Herald | Reporter | |
| | Sipho Masondo | The Herald | Senior Reporter | |
| | Dineo Matomela | The Herald | General Reporter | |
| Illustrators, graphic designers | | | | L |
| | Michalen Anandan | Independent | | S |
| | Tsietsi Letshikgwane | Bacchus Books of Media | Graphic Design | S |
| | Keshina Thaver | The Daily Dispatch | Designer | L |
| | | | | |
| Graphic Designer | Bryony Bronch | Africa Geographic | | M |
| Graphic Designer/Production manager | Nozuko Mbanja | Big Issue | | M |
| | Llewelen Cowie | House & Home Magazine | | L |
| | Palesa | Johnic Magazine(left) | Graphic Design and journalist | L |
| | Alan Eason | The Daily Dispatch | Chief Photographer | L |
| Supervisor | Carl Germishuis | Cape Ads | | L |
| Marketing and sales managers, distributors, advertisers | Allen Naicker | On Time | | S |
| | Merle Heber | Heber Marketing | | S |
| | Lorne Maclaine, | Independent Newspapers Kwazulu-Natal | | L |
| | Nadine Timothy | The Daily Dispatch | Advertising Manager | L |
| Managers of printing workshops | Richard Booyesen | Cape Printing (Pty) Ltd | Print Shop Foreman & Manager | S |
| | Asher Abitz | Albion Press (Pty) Ltd | Managing Director | S |
| | Perry Padayachee | On Time Printers | | S |
| | | | | |
| | Greg Clarke | Omega Art 2000 (Pty) Ltd | Print Press & Litho Dept. Manager | M |
| | Kneale Caine | Trident Press (Pty) Ltd | Financial Manager | M |
| | | | | |

| | | | | |
|---|--|---|--|--|
| | Brett Durrant | Durant & Viljoen | CEO | L |
| | Johan Swanepoel | Durant & Viljoen | Publishing Director | L |
| | Colin Pretorius | Paarl Post Media (Pty) Ltd | Print & Production Manager | L |
| | | | | |
| | Victor Mecoawere | SOWETAN | confused by PRINT MEDIA (but agreed to be interviewed) | |
| | Solly Mokgehele | Johncom | HR Manager | L |
| | Dolf Els | Media 24 | Manager: Editorial Development | L |
| Sales experts, marketing | Ruby Chetty | On Time Printers | Media | S |
| | Nicky Davids | Highway Mail | | S |
| | Elton Marney | Grocott's Mail | Adverting sales rep. | |
| | Niki Bryce | Natal Witness | | L |
| | Said company info is with the Print College. Did not want to stay. | Shaffie | Interpak | L |
| | Cathy van Heerden | Caxtons (Westrand) | Manager, Sales & Marketing | L (Caxtons is L, but Westrand Branch is M) |
| | Pieter Bruwer | Media24 Die Burger (Admin) | Sales & Marketing Manager | L |
| | Ashley Poobalin | The Daily Dispatch | Sales Manager | L |
| Other | | | | |
| | Sheila Goodwin | Media24 | Senior Talent Manager | L |
| | D Chetty | Univ of KZN | Corp Comms | L |
| Managers of graphic design studios | Joe Raman | On Time Printers | | S |
| | Raphael Hector | AMAC | Graphic Designer | S |
| | N Soobben | Centre for Fine Art, Animation and Design | | S |
| | V Maharaj | Rising Sun | | M |
| | Liz Perkins | Signs UN-LTD | Manager (Designer) | M |
| | Donnay Oosthuizen | Grocott's Mail | Senior Designer | M |
| | Brett Durrant | Durant & Viljoen | Representing his graphic designer because he did that before he moved up | L |
| | Stuart Slater | Hirt & Carter (Pty) Ltd | Managing Director | L |

| | | | | |
|--|-------------------|---|--|---|
| Technical staff, production, unions | Anon | Highway Mail | | S |
| | Troye Joosten | Alternate Labels & Printing (Pty) Ltd | Technical Manager | S |
| | John Waddicor | Mills Litho | Production Manager | M |
| | Martin Hiller | Grocott's Mail | Production Manager | M |
| | Cyril Diko | Grocott's Mail | Printer | M |
| | Similo Papu | Grocott's Mail | Printer | |
| | Peter and Vusi | Neo Media and Tribute (same stable) | (also left before we started with the discussion; confused by PRINT MEDIA) | M |
| | F Paruk | Universal Printers | | L |
| | | | | |
| | Neville Poulter | Media24 Magazine | Technical Operations & Production Manager | L |
| | Simon Thornberry | Hirt & Carter (Pty) Ltd | Operations Manager | L |
| | Chris van Heerden | The Daily Dispatch | Printer (Production) | L |

**MAPPPSETA
SCARCE AND CRITICAL SKILLS IN THE MAPPPSECTOR
PRINT MEDIA SUBSECTOR**

OCCUPATIONS:

- i. Managers of printing workshops
- ii. Managers of graphic design studios (attached to larger publishing houses and BEE emergent businesses), graphic designers
- iii. Technical staff, production, unions
- iv. Sales experts, marketing

See also list of occupations in the Print Media attached

This question schedule is provided to guide discussions at focus group meetings and during semi-structured interviews. It is suggested that the facilitator initiates the discussions with a short (5 minutes max.) overview of the research, as provided in the general Terms of Reference of the overall project Scarce and Critical Skills in the MAPPP Sector. Participants should be made aware of the fact that this focus group/interview deals with the subsector Print Media. The facilitator must guide the discussions with reference to specific questions listed below, but at the same time must be sensitive to critical issues that are highlighted by the participants, who are deeply involved in the subsector. It is important to remember that experiences in the subsector vary depending on the size of the company that the respondents/participants represent and the specialization/focus of the company. A large printing company with a variety of technologies will obviously view the scarcity of skills differently from those of a small business that focuses on one or two technologies. The facilitator must keep in mind that both views are important to the MAPPP SETA as the larger companies lead the subsector, but the smaller and emerging businesses have needs and challenges that have to be addressed if these businesses are to grow and become important roleplayers in their geographical and trade areas.

The area of investigation focuses on three interlinked and interdependent components. These components will form the basis for the format of the end report:

1. An analysis of the industry needs, such as
 - a. What types of occupations constitute the industry?
 - b. What are the skills needs and gaps?
 - c. What are the critical challenges to the industry to maintain necessary skills?
2. Identification of scarce skills
 - a. What hard-to-fill vacancies exist?
 - b. How are skills profiles changing, e.g. due to new technologies or changes in demand/markets?
 - c. What are the absorption rates of the industry, with regard to specific skills?
 - d. What are the scarce skills projections?

3. Identification of critical skills
 - a. What are the essential skills per occupation?
 - b. What career paths exist per occupation?
 - c. In how far is there a match between education and training provided, and the skills needed?

Each of these questions can lead to further questions and analysis.

SPECIFIC QUESTIONS FOR FOCUS GROUP DISCUSSIONS AND INTERVIEWS:

1. This focus group consists mainly of representatives from the occupation in the Print Media subsector. Could some of you highlight the most important characteristics of this occupation/these occupations?
2. Have the characteristics or elements of this occupation/these occupations changed over the past few years? If so, how have these changes influenced the type of skills that are required for the occupation(s)?
3. What is the future outlook of this occupation? Will it change significantly? If so, how, and what are the implications for training and career opportunities?
4. Career paths are important in any industry. First, how did you (respondents) arrive in the position that you have? Second, how do newcomers enter or reach this occupation, in other words, what influences or facilitates the placement of people in this occupation? In how far is the way you have reached your occupation replicable (the same) for newcomers and upcoming people in the industry?
5. From the address lists of your subsector it appears that work opportunities in your subsector are limited to specific geographical areas. In how far are these opportunities concentrated in major cities, and will this remain the same in future?
6. Could we discuss the current employment environment of your occupation in relation to changing skills needs. What is typical of the current employment environment, e.g. job growth, specialization due to changes in technologies? Do training providers address the needs of the sector?
7. Do you expect any drastic changes in the employment environment of your occupation over the next decade or two? If so, what are the reasons for your expectation?
8. Do current training providers address the expected changes in the employment environment? If so, how, if not, why not?
9. How are new entries into the subsector, and particularly your occupation, recruited from society? Particularly, how does the industry acquire scarce skills and retain them in the industry?
10. What would you consider as the scarcest and most critical skills in your occupation? (i.e. not the subsector in general, although this may be mentioned at the end of the discussion)
11. What do you consider to be the main deficiencies in skills in relation to the requirements of the industry? Are people in your occupation generally well skilled? Where are the main deficiencies and what is the impact on the functioning of your occupations in the industry?
12. What education and training is currently available for your occupation? In how far does this education and training match the real needs of your occupation in the Print Media industry?

13. What are the key focus areas of an education and training that effectively addresses the skills needs in your occupation?
14. How secure is entry into the industry/your occupation when people have received formal training, as discussed under the previous question?
15. What career opportunities do people have in your occupation, if they had non-formal training opportunities, such as on-the-job training? What crucial skills are usually not obtained through non-formal training?
16. What are the future trends in the subsector Print Media which will significantly impact on skills needs and training provision?
17. Is there any other matter that you consider as important for the design of training opportunities, which has not been discussed during this focus group meeting?

**MAPPPSETA
SCARCE AND CRITICAL SKILLS IN THE MAPPPSECTOR
PRINT MEDIA SUBSECTOR**

**OCCUPATIONS THAT SHOULD PREFERABLY BE PRESENT PER FOCUS
GROUP:**

- v. Managers of printing workshops:
 - a. Executive managers
 - b. Owners of small businesses
 - c. Foremen
 - d. Floor manager

- vi. Managers of graphic design studios (attached to larger publishing houses and BEE emergents)
 - a. Senior graphic designers
 - b. Graphic designer

- vii. Technical staff, production, unions
 - 1. Machine printers
 - 2. Finishers
 - 3. Pre-press maintenance
 - 4. Lithographers
 - 5. Compositors
 - 6. Book binders
 - 7. Screen printer
 - 8. Small offset printer
 - 9. Printing table worker

- viii. Sales experts, marketing
 - 1. Estimators
 - 2.

ANNEXURE C