

## External Developments Impacting on London College of Communication's Printing Education

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This paper looks at a number of factors that are impacting on printing education in the UK. It focuses on the activities of the London College of Communication, the major provider of higher education in the field of printing studies in the UK. The changes to the course portfolio over recent years have resulted in far more students studying printing as part of graphic design, publishing or marketing courses rather than courses directed at those who plan a career in a printing company.

The challenges facing printing education in the UK in general and which face LCC specifically have been analysed with the application of the Michael Porter Five Forces framework. This enables a discussion of competition, substitutes, new entrants, buyers and suppliers. Competition is not seen as major threat; substitutes in the context of alternative subjects being studied and the general image of printing education is a major threat, new entrants are not worrying; buyers of printing education in terms of the government and industry poses some real challenges as do the suppliers that we work with.

The analysis demonstrates a relatively unattractive activity to be participating in and highlights areas for LCC to focus on. It is clear that partnerships with suppliers, employers, with government related organisations and with universities in the UK and worldwide are key.

### Summary

This paper reviews the recent changes in printing education at the London College of Communication. It evaluates the external changes impacting on its activities with the application of the Michael Porter Five Forces framework and concludes that partnerships with a number of players including worldwide universities are key to future success.

A recent article in Print Week was headed 'Sad demise of print education'. This was a diary piece written by Lawrence Wallis, respected author and print historian, I quote:

"Over centuries the industry relied for recruitment and training on a system of apprenticeship. It worked effectively, though not without flaws, until neglected in the 1980s onwards. Sadly a robust replacement for systemised training has still to be found....the combination of workshop training and part-time education was efficacious and served the industry with distinction. It indicated that printing was not merely a means of making money, but engendered a vocational sense and industrial pride. Qualifications were administered and awarded by City and Guilds. In the immediate post-war period, the number of departments of printing in colleges exceeded 100 and that has been whittled down to a mere handful. Some printing faculties are still under threat. One acknowledges that the industry and technology have changed with different educational requirements, however the devastation has

been wanton and without adequate substitution". (Wallis, L. Print Week 13.9.07 p27)

What was my response? To immediately contact Lawrence to tell him that printing education is alive and well at the School of Printing and Publishing at the London College of Communication. But how alive and well is it really? What are the factors that are impacting on its development in the UK? What are the factors affecting its development at the London College of Communication? How many of these factors are internal to the university and how many are impacting on us from the external environment?

There are some internal changes. Why did the name of the College change from London College of Printing to London College of Communication? When the College arrived at its current site at the Elephant and Castle not far from Westminster in the early 1960s it was a printing college but its curriculum has diversified over the years, the School structure has changed a number of times and now spans Media (media and communication studies, journalism, film and video, photography) Graphic Design – largely two dimensional and digital, Creative Enterprise (marketing, public relations, interior design, travel and tourism) and Printing and Publishing (printing, publishing, digital media, applied arts). So the College name did need to change to reflect the wide range of communication based subjects that we offer. Most staff outside the School of Printing and Publishing welcome this change. In fact some readers

will have heard Anne Mulcahy, Chief Executive of Xerox, when asked at IPEX last year what she thought would be the biggest development that will take place by the next IPEX in 2010 replied that as printing technologies impact on the way information is communicated that a more appropriate title for the show would be ICEX: International Communication Exhibition.

Printing is now only part of the School of Printing and Publishing' portfolio, but it does underpin a wide range of its courses. The portfolio has shifted over the years from day release courses for apprentices as described by Lawrence Wallis to a portfolio more appropriate for a university. It now includes a range of bachelor degrees, postgraduate masters programmes, and doctorates. City and Guilds awards did not fit the profile of a university, and the funding regime also shifted to make running such programmes considerably less attractive from a financial perspective. So since the early 90s the footprint of the School has shifted, several printing presses have disappeared, typesetting has moved to the Graphic Design School, most of the teaching space is given over to computer facilities due to the significant growth in digital media courses.

So what is the School's course portfolio now?

There are seven printing focused programmes, from a couple of print based diplomas through bachelor programmes, a couple of masters programmes and a number of PhD students – this comes to about 130 students. But these are not the only students studying printing in the College. We have recently launched the only dedicated magazine publishing bachelors course which is offered as a single honours as well as a combined honours with a number of other disciplines including sports journalism – there will soon be around 240 students on this programme. Printing production underpins each year of the programme.

We also have a successful MA in Publishing (book, journal and magazine) again with printing production being a distinctive aspect of the course, the BA in Book Arts includes aspects of printing production and most recently we are delivering a pathway in Design for Print for the College's large graphic design degree – another 500 students a year studying printing as part of their courses. We also offer electives in digital printing (design and application) and digital colour to

all students in the College as well as a number of short courses in printing subjects – hitting another 500 students. Students from across the University want to come and use our printing facilities – from Central St Martins, from Chelsea College of Art etc.

But as Andrew Tribute, an important industry commentator and LCP alumnus, has said "the worrying aspect where printing technology is being taught as parts of courses in areas such as graphic design, publishing and marketing is that the buyers of print will be more knowledgeable concerning printing than the printers they are buying from" (<http://members.whattheythink.com/home/tribute.cfm>)

So why am I still worried about printing education within my university, within the UK? This is because we do feel that our printing focused courses, those that are delivering the next generation of employees for the printing industry, are facing a number of challenges in their external environments. Recruitment is not growing, particularly from UK students, on some courses our international recruitment is much stronger than domestic recruitment. Courses we ran with big numbers 10 years ago are now beginning to struggle. What is happening?

What are the challenges facing us in our external markets? As someone who has taught strategic management for a number of years I thought I would apply one of the most popular management models: Porters 5 Forces (Porter M. E. Competitive Strategy, Free Press, 1980).

### Competitive rivalry?

Who are the competitors? We have little direct competition in the UK. Napier and Watford College have closed their printing courses over the last 5 years. Leeds University has a number of part-time printing programmes including a BSc delivered in partnership with Leeds College of Technology. Leicester College has a two-year Foundation Degree in Print and Digital Media Production. UK students do not travel for their education – apart from some Erasmus exchanges largely to Germany. There is of course a lot of competition for international students. There is a lot of indirect competition. Students who might have come to us in the past are now more likely to study Business Studies, Marketing, Engineering.

### Power of Substitutes

How many school leavers (17-18 year olds in the UK) want to study for a degree in printing? This does appear to be a cultural issue, demand for printing undergraduate programmes in Germany, in Canada, in the US still seems to be strong – but may be declining, particularly in the US. Can we turn this trend round? Should we be dropping printing from our course and college names, moving to Graphic Communications, Graphic Arts? This can cause confusion in the UK as students enrol on what they believe to be graphic design programmes. How can we make printing attractive to school leavers, can we make printing attractive to school leavers? The printing industry in the UK has an image problem, it is perceived as industrial, lacking creativity and lacking dynamism. The substitutes are graphic design courses, media studies, management and engineering.

Many printing universities and colleges work with schools to raise the profile of printing. We are involved with PrintIT ([www.printit.org](http://www.printit.org)) a marvellous initiative to bring the theory and practice of printing into the classroom, enabling 14 year olds to work with local printing companies to design and print promotional materials for Fair Trade, around 450 schools in the UK are involved in this project. Our involvement this year was to print the teacher and student packs that have been distributed to the schools. We work with the Newspaper Education Trust which takes groups of school kids into a mock news room based at the Daily Telegraph's print works to be exposed to journalism and well as production aspects of newspapers, companies such as Polestar have produced DVDs on printing to help explain the technologies of printing to a wide audience. We are working with magazine publishers such as IPC and National Magazine Company on school-based projects to encourage an interest in magazine design and production.

We are participating in international debates on printing education – for example Heidelberg have hosted two global debates over the last two years, the first in New York the second in Singapore; we have participated in both. Earlier this year Heidelberg brought together six of us from around the world (UK, Australia, US, Thailand, Brazil, Germany) to discuss global trends in printing education, how to attract the best students to study printing, how we could collaborate, how we

need to develop our courses to reflect the changes taking place in the industry. We discussed the traditional image of the printing industry and the need to promote a more exciting image to school leavers, how print must be seen as being an integral part of the communication process and how this is part of a dynamic sector of the economy. We also need to promote the breadth of activities involved in printing management and what an attractive career it can provide.

The main substitute to the education we can offer to those employed in training via part-time courses is no part time course. Research undertaken in the UK shows that printing companies place little value on educating their work-force. It was only last week when visiting a well recognised medium sized magazine printer that the senior management said that they did not want to spend time and money on providing day release education for their work force because they might then leave for a better job – a very short-sighted view of workplace education and training.

So the threat of substitutes is high.

### Threat of New Entrants.

New entrants to printing education? This is not a worry, this would be good as it would help to raise the profile of printing education. We are faced with players leaving the industry not joining it. What about private training providers? But these are not really competitors to our core business of education.

Suppliers are increasingly playing a part in education, from their willingness to support our activities, e.g. Heidelberg, Xerox, Hewlett Packard, Fuji. Some of these are working very closely with universities e.g. Heidelberg who has close relationships with several. We would never have launched a new MA in Print Media Management without their support and recognition that there is a global need to address key strategic management issues for printing at masters level.

New entrants can only help raise the profile of printing education so this is not seen as a threat.

### Power of Buyers

Who are the buyers? The students? Industry? Government? In the UK students have no bargaining power over price, our fees are fixed by the government at the moment. But this is likely to

change and universities will start to compete on price. This is actually happening to a small degree with Foundation degrees, these are 2 year degree programmes introduced by the government about 10 years ago to provide vocationally focused programmes for 18 year old school leavers with only 1 A level to undertake a course with a considerable amount of work based learning, either at the work place or offered by the university or college. There must always be the option to progress to a third year and hence an obtain an honours award. There is a difference in course fee between Foundation degrees offered by Universities and offered by Colleges of Further Education. We have a Foundation Degree in Printing and Publishing Production.

In London our demand from international students remains high, it is the UK student that we are most worried about. This is linked to the fact that the UK printing industry does not value employing graduates or is willing to release students for part-time study any more.

Who are the students? Those who want a printing qualification, those who want to learn about printing. It is the latter which represents the growing market for a University in the UK.

What is industry's involvement? How is it determining what we do? We all have industry forums who have a key role in determining our curriculum and now through the UK government's Sector Skills Councils (SSCs) have in theory a direct route to determining content and structure of our qualifications. There are 25 employer led organisations, funded by the Government whose aim is to reduce skills gaps and shortages; improve productivity, business and public service performance; increase opportunities to boost the skills and productivity of everyone in the sector's workforce and improve learning supply including apprenticeships, higher education and National Occupational Standards (NOS). Proskills is the SSC that includes printing in its footprint.

The Government's agenda on future development of much of higher education is now driven by the results of the Leitch Review. Lord Leitch produced a substantial review of the UK's skills base 'Prosperity for all in the global economy – world class skills' in December 2006. This review concluded that the UK faces a huge challenge in order to be a world class player by 2020 both in terms of what is happening in the workplace but

also what is happening in colleges and universities. The newly created Department for Innovation, Universities and Skills published its response 'World Class Skills: Implementing the Leitch Review of Skills'. This provides the framework for future funding of much of higher education with a key focus on the need for universities to work closely with their target industries (via the Sector Skills Councils) and to focus on the growth of 2 year foundation degrees. One of the Leitch recommendations is to 're-balance the priorities of HE institutions to make available relevant, flexible and responsive provision that meets the high skills needs of employers'.

So this provides some new challenges for us, not only do we need to work with the Quality Assurance Agency for Higher Education we now also need to work with a number of Sector Skills Councils.

Proskills research has highlighted the extent of the skills challenge faced by the printing sector, the extent to which training is largely now 'on the job' and in-house. The research showed a significant lack of value placed on printing qualifications – strange as the majority of print bosses have undertaken printing qualifications at the beginning of their careers. Employers are only interested in training their workers to do specific tasks. Proskills response to this is to support the move of government funds from supporting college based courses to the employers to offer short courses in the workplace. Proskills seems happy to see 'class-room based teaching in the printing industry die'.

It is important that Proskills recognises LCC's role in higher level printing education which we offer in part-time mode to those who are employed in printing companies. We are developing part-time versions of our bachelor and masters programmes aimed at those who are already working in the industry. It is vital that Proskills recognises and communicates these developments and includes them in any UK-wide mapping exercise.

Student bargaining power is at the moment relatively low, but bargaining power of industry and government is much higher.

### Power of Suppliers

Who are our suppliers? The printing equipment manufacturers, the software suppliers, the computer hardware suppliers. We have no bargaining power to determine what price we pay for printing supplies, we work closely with the suppliers to negotiate good terms because the manufacturers chose to offer those terms, because they can see the benefits of supporting universities. We have some bargaining power with our purchase of computer software and hardware because of the huge volumes that we purchase.

Teaching staff can be seen as suppliers. Here we have a problem in recruiting appropriately experienced printers with teaching skills. We are constrained by our salary scales so can't usually offer over the odds to attract the right people out of industry into teaching. However we have recently advertised for a printing technician and I am very pleased at the quality of the candidates, we will shortly be interviewing around 6 well qualified printers, some with previous teaching experience, all with training experience.

What are the conclusions of this analysis?

- Rivalry among players: relatively low
- Threat of new entrants: low, new entrants are good
- Threat of substitutes: high
- Power of buyers: students low, government and industry high
- Power of suppliers: high

### Attractive or not attractive?

This analysis demonstrates a relatively unattractive activity to be participating in, and highlights areas for us to focus attention on. It is clear that partnerships are key: partnerships with suppliers, with employers, with government related organisations, with other universities in UK and world-wide.



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