IMPORTING SKILLS FROM OTHER INDUSTRIES INTO THE PUBLISHING

RENODO

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Fundación Germán Sánchez Ruipérez

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0.
INTRODUCTION

The aim of the paper is to study the capabilities and know-how that, with a view to fostering more efficient operation of the book chain, might be transferred from other industries and disciplines to professionals in the book sector.

We seek to use this initiative to drive leadership in the book sector in Spain by 'importing' work systems, tools, approaches and methodologies that are commonplace in other industries or professional activities. Research into the appeal and viability of adopting these tools will be incorporated into training strategies such as the PARIX training programme.

For definition of this project, inspiration was taken from the 'learning in a landscape of practice' concept introduced by Etienne and Beverly Wenger Trayner (hereinafter Wengers). The concept refers to how people learn and develop within the 'communities of practice' in which they participate.

1.
WHAT IS A LANDSCAPE OF PRACTICE?

A landscape or community of practice is a group of people who share a profession, work in a certain field or have a shared interest in something they engage in. According to the Wengers, communities such as these result in shared learning through participation in the shared activity. For example, librarians or virologists can form a community of practice in which they exchange information and, together, learn about best practices in professions of that kind.

According to the Wengers, communities of practice create a certain 'landscape of practice' in which members can interact, share information, resolve issues and develop skills and know-how. This landscape of practice includes not only technical knowledge and the skills needed to perform the job itself, but also the standards, values and ways of thinking that define the community of practice and turn it into something concrete with its own identity.

When one joins the 'world of books', one quickly notices that there are some terms, rules of play, a mental framework, values and a very specific mindset that are shared as the common ground in the book value chain. In the world of books, know-how and capabilities are an integral part of the landscape of practice, without which industry professionals would be unable to function efficiently in the field.

If the 'inhabitants' of a landscape of practice are to learn, this implies active participation in the community of practice, in addition to critical analysis of the practice itself and the role each individual plays in the community. In addition to learning from experts within the community, participants also learn from each other and share their experiences and know-how.

The Germán Sánchez Ruipérez Foundation (Spanish acronym FGSR) became familiarised with the consequences of this approach during a meeting with Beverly Wenger Trayner within the framework of a seminar in Seattle aimed at the world of libraries. Based on the work that the foundation has been carrying out for years to foster innovation in libraries, an interest in developing something of a similar nature for the book industry through what we have denominated 'importing skills' has emerged.

2.
IMPORTING CAPABILITIES FROM OTHER LANDSCAPES OF PRACTICE

The idea of using the approaches in the 'learning in a landscape of practice' framework concept as a means of stimulating innovation is based on the hypothesis that wide-ranging contexts and needs foster development of a range of skills but, at the same time, that diversity is compatible with the existence of challenges and equivalent needs.

In principle, almost all industries are based on the same framework: creating value to generate earnings that are shared with the members of the chain that created the value.

The idea behind this exercise, therefore, is to foster transfer and adaptation of practices and resources from one community of practice to another. That is, from other business sectors or industries to the world of books.

Our starting point faced two relevant challenges:

- Adapting the practices or resources in a given industry to the world of books entails completing a complex prior step. That is, identifying the communities of practice with interests or skills that are common to the book value chain. Similarities in the range of challenges need to be identified, even if the morphology of the other sector is very different.

- Also, it is essential to identify industrial or professional sectors in which capabilities that have proven successful in resolving equivalent or similar challenges to those of the world of books have been developed.

Transfer of knowledge and practices from other industries could prove beneficial for innovation and competitiveness in the book industry in Spain and could prove useful in defining the sector's range of training courses. This project is based on the conviction that companies can improve their efficiency, quality, sustainability and ability to adapt by adopting practices and resources from other industries, and that this can lead to competitive advantages and enhanced value for clients (readers).

It is not a search for inspiration alone; experience applying a certain competence or using a certain system, process or technological tool in other sectors could be used to learn from what worked well and, in addition, from the failures or errors that needed to be resolved during execution.

By importing skills in this way, the book industry can learn from others' experiences and perspectives, making it possible to adapt and enrich practices and resources in the publishing industry.

We do not expect this transfer of knowledge and practices between industries to enhance improvements in efficiency alone; we expect it to drive innovation in a sector that is characterised by long-standing inertia. In short, by adopting practices or resources from other industries, the book value chain could improve in efficiency, quality, sustainability and ability to adapt, which could give rise to competitive advantages.

3.
IDENTIFYING OTHER LANDSCAPES OF PRACTICE

If the publishing industry is able to acquire capabilities and practices that are present in other industries or communities of practice to improve its ability to innovate, adapt and generate added value for clients, the sectors or landscapes of practice (as per the Wenger terminology) from which to import skills must be identified.

The team at FGSR has worked to identify certain crucial skills or areas around which there are clusters of capabilities that could be imported from other sectors which, for one reason or another, have already developed them or have done so in a more exhaustive manner:

1. Design and user experience
2. Collaboration and co-creation
3. Sustainability and logistics
4. Communication and audience development

In recent times, technology companies have worked intensely on the first two skills.

The question of knowhows linked to sustainability and logistics is a more complex one. In terms of sustainability, the world of books does not yet seem to have accepted that it is a crucial factor for development. Discussions with a number of industry professionals (other than in the distribution industry) have suggested there is a perception that logistics capabilities are not of interest to them because their work does not entail concerning themselves with services provided by other companies. In response to these reasonable doubts, the decision was taken to group the sustainability and logistics concepts. This challenge would affect the entire value chain.

The books value chain is also a supply chain and it is possible that the books industry may find logistics and sustainability models in other sectors, particularly those that are characterised by efficient and effective management of supply chains.

Feedback on each of the four challenges was requested in work sessions and conversations with leaders from other industries. An initial review of the industries that may face similar challenges or have worked hard in this field is provided below.

1. The food industry. The food industry has managed supply chain logistics from production through to end delivery at points of sale in supermarkets efficiently. In doing so, it has developed skills in demand planning; inventory management; storage; and transportation and distribution, among others.

2. The pharmaceutical industry. If there is an industry that comes at all close to the complexity of the extensive fragmentation and number of commercial items or goods in the book industry, it is the pharmaceutical industry, even if its range of items is smaller. In addition, the pharmaceutical sector is a very interesting one because it has had to transform into a benchmark for logistics management to guarantee quality and safety in the supply of drugs. This implies expertise in skills such as inventory control, quality control, and supply chain safety.

In the case of skills linked to communication and audience development, the book industry may find work methods that are of interest in several industries that also focus on high-quality content creation and diffusion and generation of strong relationships with its audience.

1. The publicity industry. Publicity agencies work hard to create effective and persuasive messages to connect with the target public in each product or service. The publishing industry could find areas for reflection and work that have proven useful to the publicity industry in terms of defining clear objectives for each communication proposal and, above all, in terms of its ability to segment a rather sophisticated target audience.

2. The media industry. Clearly, it is the most specialised industry in this field and it has a great deal of experience in creating and disseminating content that appeals to mass markets. The publishing industry could find inspiration in the way in which the media has had to respond to the threats posed by the emergence of solutions managed by Internet users themselves. The most relevant case can be found in the television industry over the last 10 years, which has faced the threat of huge drops in younger audience numbers as a result of competition from other audiovisual content and other types of entertainment.

3. The video game industry. Over the last decade, video games have become the content industry that has grown the most. The industry has used in-house means of communication on the Internet that have created huge communities of enthusiasts. It has also managed to set up invoicing systems based on a wide range of sources and on its relationship with the communities.

4. The music industry. This industry focuses on the creation and promotion of cultural and artistic content. It could prove inspiring in terms of emotional content creation that connects with the audience, event promotion and follower loyalty.

5. The fashion industry. This sector faces growing challenges in data management for market segmentation and brand building, including subsidiary brands, as well as the relationship between the different collections and the brand.

6. There is also a link through equivalent challenges with other creative and cultural industries, such as audiovisuals, the performing arts, cultural heritage, and tourism.

For quite some time now, the Germán Sánchez Ruipérez Foundation has been calling for adoption of strategies from sectors other than the publishing sector. The first edition of READMAGINE was organised in 2006 and its main objective was described as the search for inspiration in the innovation dynamics that other sectors were implementing in response to shifts in digitalisation.

The following were selected from among the lines or areas to which innovation might relate:

- Incorporation of processes from other industries for production, logistics or book sales;
- Implementation in the organisation itself or in book businesses of new work systems associated with digitalisation, training, talent management, quality assessment and work tools;
- The search for new tools for communication, marketing and making books visible on the Internet;
- Last of all, the idea of questioning the type of product itself in terms of formats or incorporation of add-ons and new functional elements was also raised.

Despite the time that has gone by and the fact that certain ideas linked to the dynamics in start-ups (which were more present then than now) have been left behind, the interest in observing the capabilities used by other sectors continues to be a priority for FGSR.

4.
COMPARISON OF IMPORTED CAPABILITIES WITH THOSE IN THE PUBLISHING

If we were to make a selection from the reflections derived from texts by Michael Bhaskar[1] on key skills for working in the publishing industry, the following elements might stand out as current priorities.

1. Understanding the impact and consequences of new digital technologies. Publishing industry professionals need to keep up with new technologies and their impact on production, distribution and the way in which audiences consume content.

2. Knowledge of how the market operates. Publishing industry professionals need to have a good understanding of the market and of the tastes and needs of each segment in terms of what people who buy books expect. This implies being able to identify trends and opportunities in the market and adapting to changes in content consumption patterns.

3. Access to transversal management skills. Publishing industry professionals must have management skills in order to lead teams and suitably manage the talent of team members and projects.

4. Knowledge of copyrights. Publishing industry professionals need to have a solid understanding of the regulatory framework and the meaning of copyrights and intellectual property.
   John Thompson[2] coincides in elements such as management skills and market knowledge. However, through his work, we gather that two further elements should be added.

5. Knowledge of the book production chain. Publishing industry professionals must have a good understanding of the processes involved in the book value chain, from the purchase of rights over a work to distribution and sale of books. This means understanding the processes across the different stages of the publishing process and the roles of the different players.

6. Communication skills. It is also essential for publishing industry professionals to develop communication skills to interact with authors, readers and other industry professionals.

1. Bhaskar, Michael, *The Content Machine. Towards a Theory of Publishing from the Printing Press to the Digital Network*. Anthem Press (London, 2013). And '*Los fundamentos del libro y la edición. Manual para este siglo XXI*', Trama Editorial (Madrid, 2021).
2. Thompson, John, *Merchants of Culture: The Publishing Business in the Twenty-First Century*, Plume Books (New York, 2012). These references can also be found in an indirect manner in '*Las guerras del libro. Edición y revolución digital*'. Trama Editorial (Madrid, 2022).

When we take a look at Brian O'Leary[3] (speaker at several editions of Readmagine[4]), skills in the digital domain and knowledge of the book value chain also stand out, but two additional skills can also be extracted from his work:

7. Development of effective marketing strategies. Any professional managing a publishing project should have the ability to develop effective marketing strategies to promote and sell books in a digital environment. This includes the ability to use data analysis tools to understand reader behaviour and develop marketing campaigns that focus on consumer interests.

8. Project management skills. Publishing industry professionals need to have the skills to manage initiatives that adapt to an environment that is constantly undergoing transformations. Skills of this kind include the ability to plan, coordinate and control the work being carried out by the different departments and agents involved in the production and distribution of publishing sector content.

Last of all, if we look at an expert, such as Jane Friedman[5], who focuses more on the world of authorship, we find a coincidence in terms of the importance of marketing skills when it comes to promoting books. However, when she states that knowledge of the market is crucial, she highlights a skill with a closer link to transformations in reader behaviour, and adds the detail of relationships with authors. And so, we might add two additional epigraphs:

9. Like Bhaskar, in the case of authors, Friedman focuses on knowledge and interpretation of reading trends. Professionals in the writing world need to have an up-to-date understanding of the trends among reader tastes based on changes in reading habits and preferences in terms of genre and styles of literature.

10. The ability to work with authors. Publishing industry professionals need to have the skills to work with authors, including the ability to communicate effectively, provide constructive feedback and manage author expectations throughout the process.

3. *Book: A Futurist's Manifesto Essays from the bleeding edge of publishing.* Edited by Hugh McGuire and Brian O'Leary. O'Reilly Media (2012, Sebastopol, CA).
4. The conferences and documents generated over a period of more than 10 years at international meetings on innovation in reading and books can be found on the following website: https://readmagine.org/
5. Friedman, Jane. *The Business of Being a Writer.* Chicago University Press. (Chicago, 2018).

5.
SELECTING THE REFERENCE INDUSTRIES

Diagnoses of publishing industry challenges and the opinions of leading authors such as Thompson, O'Leary, Bhaskar and Friedman, have culminated in an incredibly complex and demanding scenario.

Selecting one industry or another is no more than an instrumental procedure. It serves the heuristic purposes of this series of conversations and exchanges of ideas and documents between professionals. It should not be understood as an indication of proximity to the book sector, but rather as the result of an analysis of the challenges that should be taken into account in the book world and that also exist in other sectors.

The existing dynamics in four industries that differ greatly from each other and that are also removed from the work systems and value proposals in the publishing sector were used:

1. The audiovisual industry: production and sale of television content;
2. Large supermarket chains: the food distribution sector;
3. The fashion industry: design, production and sale of clothes and accessories;
4. Video games: e-sport-related content generation;
5. Other creative and cultural industries.

There are similarities between the field of television production and generation of products with a link to e-sports and the publishing industry, since they are all part of content industries. The fashion industry shares the creative matrix and a type of value chain that is underpinned by creativity and culminates in sales networks. The food distribution sector presents similarities due to the granular nature of its articles, with a wide spread of items for sale across several channels.

Digitalisation and the Internet have had a significant impact on the television production industry. In this field, the works of academic authors such as Henry Jenkins were consulted. His book *Convergence Culture: Where Old and New Media Collide* explains the impact the Internet has had on transforming strategies in television. Work by Derek Johnson who shows how fans participate in production and distribution of television content on Internet platforms was also consulted.

Lynn Spigel has researched how television has adapted and transformed its responses to digitalisation and transmedia. Amanda D. Lotz is the author of books such as *The Television Will Be Revolutionized* and *Portals: A Treatise on Internet-Distributed Television*, which address adaptation of production strategies in television stemming from globalisation of Internet use. Jean Burgess has focussed on *YouTube: Online Video and Participatory Culture* and analysis of the way in which the YouTube platform has changed production and distribution of television content.

Several authors have studied the video game industry from the point of view of businesses strategies. From them, we gain an understanding of the action plans used in the sector. At academic level, authors such as Michael E. Porter and Mark J. P. Wolf have studied the conceptual frameworks that the video game industry employs. We also have the testimonies of executives such as David Reeves who has shared his vision of the industry's strategies based on his experience at Sony. In the field of e-sports, Scott Steinberg has published articles about trends in the field. Anita Elberse has analysed video games within the framework of a wider outlook that covers the entire content industry. She has recorded her findings in her book *Blockbusters: Hit-Making, Risk-Taking, and the Big Business of Entertainment*.

We were keen to look for references in transformations in the fashion industry based on the impact that digitalisation and the Internet may have had on the value chain and consumer behaviour. Elizabeth L. Cline is the author of leading research on this subject in her analysis of the impact of mass production and fast fashion in the digital era in *Overdressed: The Shockingly High Cost of Cheap Fashion.* In addition, in *Sustainable Fashion and Textiles: Design Journeys* Kate Fletcher addresses the sustainability challenge in the fashion industry. She also analyses the role of digital technology in production and sale of sustainable fashion. In *Fashion and Cultural Studies* by Susan Kaiser we find a very comprehensive vision of the role of e-commerce as an element that transforms the rules of the game in this industry's value chain. In *Fashionopolis: The Price of Fast Fashion and the Future of Clothes*, Dana Thomas takes a critical look at the issues posed by so-called 'fast fashion' and how digital technologies have led to accelerated production cycle processes.

Digitalisation and the Internet have also had a significant impact on the food sale industry. There are a range of approaches in the referenced sources. McKinsey studies on digitalisation in the food industry are undoubtedly helpful in understanding the way in which digitalisation is changing the supply chain and sales in the sector, including the adoption of technologies such as e-commerce and grocery shopping home deliveries. Furthermore, regular reports by Nielsen on food e-commerce provide data on the way in which consumers use the Internet and technology to purchase food and groceries on-line following the exceptional circumstances that arose during the pandemic. Marion Nestle has published books titled *Food Politics* and *What to Eat* in which she shares the results of her research into the food industry and how digital technologies have impacted sale and promotion of foodstuffs.

We used documentary sources to locate industry leaders who might be able to share their experience of each of these industries with professionals from the book industry. Within the framework of this project, we commissioned analysis documents and organised exchange sessions between sectors.

The following people were selected:

- Carlos García-Hirschfeld, Founder of La NUEZ productions
- Aurelio del Pino, Chairman of the Association of Supermarket Chains in Spain
- Clemente Cebrián, Founder of El Ganso
- Fernando Piquer, Founder of Riders
- Antonio Bazán, Director of Factoría de Industrias Creativas.

6.
THE TELEVISION INDUSTRY IN THE WORDS OF CARLOS GARCÍA-HIRSCHFELD

Since Carlos García-Hirschfeld began his career in television, there has been a process of intense fragmentation. 'Over the years, the model has been broken down into a thousand pieces, but the definitive change in the business model has been taking place recently.'

The main channels have broken down. 'I don't spend money every day on newspapers any more. How many people subscribe to printed press in the online version? How many people are registered on media platforms? People are reluctant to start handing their data over to a media source. And they're even more reluctant when it comes to paying for a subscription. Let's do the maths using the price of a newspaper in 1983. 40 Spanish pesetas. 25 cents, more or less. If we multiply those 25 cents by the 365 days in a year, nowadays that would be €91.25. Very few people are willing to pay those €90 a year to have unabridged access to a national newspaper. And we haven't taken inflation into account. If a newspaper costs €2 today, those €91 in 1983 would be €730 today. Clearly, almost nobody would be prepared to pay €730 a year, but the point is that people are not even prepared to pay €90.'

Complementary sources have also broken down. 'All is lost for advertisers. All is lost for agencies. All is lost for media centres. But all is truly lost for media itself.'

The huge change in paradigm is linked to the pay-per-view business model. According to García-Hirshcfeld, there have been two decisive events. 'The arrival of telecom providers on the content provider scene. You no longer paid to watch TV. You had fibre optics or a good telephone line and, what's more, they opened up access to pay TV. We no longer pay for TV. It comes in a bundle. The arrival of streaming platforms on which you have access to thousands of contents for very little money. Netflix in Spain led the way initially but other operators such as HBO, Apple, Amazon, Rakuten and so on quickly joined in. The last two are on-line sale platforms that add content to their range. If you have a premium account, in addition to advantages in purchases, you get the content.'

Studies of demand with the segmentation scheme based on age ranges per home according to socio-demographic and cultural elements are a lot more complex now than they used to be.

‘There is no use dividing data up by “homes” like we used to do in market research. Nowadays, if there are five people in a home, there can be five different ways of consuming information. And five different commercial profiles.’

One of the strategies that is starting to kick off is content migration to attract migration of actual audiences or potential ones towards those channels or media. This is the phenomenon that is taking place from generalist TV channels towards paid subscription platforms, and from radio companies to podcasts.

Newspapers face an even greater challenge because, since their sales and publicity have decreased so dramatically, production on paper is less and less viable. ‘The only solution is for “readers”, consumers of information and newspaper content, to also adapt to paying to read. We cannot get good journalism with inexperienced and poorly-paid journalists. There is a first step now in most newspapers; having to subscribe to read certain content.’

One of the leading strategies in the television sector is the search for global audiences. ‘The good thing is that the business has opened up to us and we can sell our content around the world. We had always been able to do it. In fact, several Spanish formats were successful in international TV shows (*El Hombre y la Tierra, Médico de Familia, Cuéntame* and, more recently, *Tu Cara me suena*). But the new platforms have opened up an unimaginable market. Without the need to do versions. *Money Heist* wasn’t particularly successful on the Spanish channel Antena 3. But it was a huge hit on Netflix. The last few episodes of the series, which were produced by Netflix, were filmed in Hollywood-style conditions and now the actors are global stars.’

Another of the strategies that really took a hold as a result of the exceptional circumstances we experienced during the pandemic was much lower production costs. ‘It is much cheaper to make a news programme nowadays than it was three years ago. You can interview people live on Skype, Zoom or Meets. You can air declarations people have recorded on a mobile phone… Rubbish audiovisuals that nobody would have taken on before get accepted now. It’s all a lot cheaper to produce. You realise that you can produce a programme. You incorporate methods that you had never even thought about before and go with whatever you’ve got. Nowadays it’s all about agility and the ability to adapt. By being agile and adapting, we were able to come up with a minimum viable product. And TVE took us up on it.’

7.
THE SUPERMARKET SECTOR IN THE WORDS OF AURELIO DEL PINO

Aurelio del Pino provided us with a good description of existing dynamics in large general merchandise companies: 'Large companies do not focus solely on selling products; they also focus on being present and providing solutions and services for whatever consumption needs a person may have. This means that each company uses the organisation's strengths to try and develop different sales policies that make them stand out from the rest.'

This is how we would define the sector: 'The food distribution sector in the shape of supermarkets is a mature sector, but one that is constantly changing and evolving. The huge competition between formats, channels and companies means that businesses are constantly analysing their results and adapting their strategies. We are talking about consumer staples in food, perfumery and personal hygiene products that everybody needs to have in their homes. We might be inclined to think that sales are guaranteed and that there are limits to what people can consume, but companies fight on a daily basis to win not only a larger share of the market but also grow the market itself larger by incorporating new products and services that add value.'

Sustainability is a key topic of our times since it is no longer seen as an added value within a company's range of products and of the products themselves, but as a starting point. According to Del Pino, 'Companies do not have the option of choosing to not have a clear sustainability policy. The challenge lies in using those objectives to improve company management and financial results and the confidence of consumers and investors.'

The consequences of the demand for sustainability lead to specific strategies:

1. Guaranteeing sustainability in supply chain traceability, and accounting for environmental certification, animal wellbeing, social wellbeing, and so on;
2. Getting involved in the viability of agricultural production, collaborating with local producers and incorporating organic products into the product range;
3. Introducing measures to prevent waste generation, reduce the carbon footprint and even be an active agent in controlling the flow of waste from supermarkets.

In addition to this environmental challenge, companies with large shop floors are rolling out the following strategies to grow their market share and improve profitability.

1. Product range policies. Knowing what they need in terms of the depth and breadth of their product range in order to attract consumers. Searching for stand-out features of specialisation.
2. Promotion policies. Generating interest by offering consumers special seasonal conditions.
3. Omnichannels. The ability to provide different formats and models, online purchases, guaranteed coherence across all channels and home delivery.
4. Opening hours. Adapting opening hours while adhering to legal restrictions and managing peak and off-peak hours.
5. Improving consumer knowledge is key. Compared with the relative homogeneity of families some decades ago, we now find a great deal of heterogeneity among consumers who each have their own demands, generations of people with very different behaviour patterns, an increasingly ageing population, a greater percentage of people with allergies, food intolerances, and food trends. Business opportunities and new trends must be identified. In order to do this, the sector has very detailed information provided by large companies who carry out market research.
6. Use of new technologies to improve knowledge and business management. Use of these technologies is good for sales but also for communication with consumers who, as a result, are more empowered than ever.

When asked about the impact of the pandemic, Aurelio del Pino selected the following trends which arose or intensified as a result of the special circumstances at the time.

1. Competition with the hospitality sector for 'stomach share' meant distribution formats and hospitality itself became more hybrid in nature. This was a result of restrictions on movement, and working from home.
2. Publicising companies' contributions towards improving conditions for vulnerable families and collaboration with food banks and NGOs.
3. Taking on an even more active role in the transition towards new consumption habits and healthier and more sustainable eating habits.
4. Fostering processes to improve online purchases.
5. Introducing additional supply guarantee measures.
6. Adding new healthcare solutions (face masks, hand sanitiser, etc.) to the product range.
7. More active management of institutional relations departments.

8.
CHALLENGES IN THE FASHION INDUSTRY IN THE WORDS OF CLEMENTE CEBRIÁN

This sector has one of the most intense competition scenarios, which makes identifying and defining potential clientèle key to appropriate brand positioning as the basis for client uptake and loyalty. This identification process must account for changes in consumer demand which experienced a turning point during the huge shift in fashion consumption patterns that came with the pandemic, increasing the demand for comfortable and casual clothing and decreasing the demand for party and formal clothes. Brands have to adapt to these changes in consumer preferences.

Changes in demand in this industry also depend on changes in trends and seasonal changes. Fashion used to have defined seasons but an increasing number of brands are adopting 'fast delivery' models that satisfy immediate consumer demand. This can be a challenge in terms of planning production and managing inventories.

Excessive consumption is another factor that has a relevant impact on the dynamics of the industry. Fast fashion has led to an accelerated production cycle and excessive purchase of clothing which increases textile waste. Consumers are beginning to reassess their purchasing habits and buy better quality, more durable clothes.

In addition to the aforementioned factors, there is a context of global competition. Globalisation has led to increased competition in the fashion industry in which brands from around the world compete in the same markets. To stand out, companies must differentiate and have a solid brand strategy.

In this context, among others things, survival means implementing product strategies that can give brands a differentiation factor, managing communities efficiently through promotion and privilege policies, capitalising on physical shop locations (brand stores or retail concessions) and making online promotion and sales more efficient. In the case of the latter, it is absolutely key for brands to really know what they are doing in two areas.

- Technological innovation. The fashion industry is adopting technology more comprehensively, from 3D printing to augmented reality and artificial intelligence. Incorporating these technologies is a challenge but they also pose an opportunity for improving efficiency and customer experience and for decreasing stocks through the implementation of 'single stock' formats, meaning that an item is available across all sales channels.

- Digitalisation and online commerce. The increasing importance of e-commerce and digitalisation has presented challenges for fashion brands in terms of data management, logistics and online marketing (with the arrival of LinkedIn, Instagram and TikTok, although it has been determined that a balanced use of content and advertising channels is necessary since excess information tends to confuse and even annoy customers). Furthermore, piracy and counterfeit products are growing issues in digital environments.

Other examples of relatively recent initiatives that help to diversify what fashion companies offer are associated with:

- Removing production intermediaries and turning the archetypal buyer into a hybrid buyer/designer (a trend that the world of advertising already got one step ahead on with the fusion between teams of copywriters and account managers).
- Alliances with the entertainment sector through the generation of capsule collections for large international tours and large audiovisual productions.

Last of all, we must highlight how the fashion industry is paying increasingly more attention to complementary strategies that help cement brand image and send clients positive messages that are linked to the following:

- Environmental sustainability. Fashion is one of the most contaminating industries in the world. It consumes elevated amounts of natural resources and generates lots of waste. The pressure to adopt more sustainable practices and decrease environmental footprints is a key challenge. This is linked to the adoption of circular economy models in which the focus is on ‘eco-design’, replacing materials that contaminate with sustainable ones, decreasing waste, implementing more efficient production processes in terms of energy consumption, and using technologies that facilitate raw material traceability, from extraction through production to distribution.
- Social responsibility. Concern for working conditions along the supply chain in the fashion industry, particularly in developing countries, has grown. Consumers demand greater transparency and ethical production, and this has led to a focus on social corporate responsibility and justice for workers.

9.
OTHER CREATIVE AND CULTURAL INDUSTRIES

The many sectors that fall within the framework of creative industries work within a general context of huge transformations linked to accelerated digitalisation fostered by the post-pandemic context. They are clearly boosting transformation of their business and management models, with some common features and, above all, certain individual approaches in each discipline that could be a source of inspiration for making improvements to certain processes within the publishing world.

Some of the sectors that clearly exemplify these circumstances are indicated below:

Audiovisuals, with initiatives underpinned to a large extent by European funding programmes that seek to foster Spain as an audiovisual hub in Spanish, through steps that focus on:

- Technology as a catalyst for innovation at the service of production and post-production of audiovisual material. A range of artificial intelligence applications come into play here. They optimise the creation of animations and the creation of a catalogue of cloned voices that facilitate automated production of voice-overs and narrative voices (with copyright management integrated into the service). This streamlines production deadlines and helps to centralise copyright management. These benefits are complemented by the implementation of tools that facilitate delocalised post-production.
- Boosting the generation of an innovative financial ecosystem at the service of audiovisual production which, with the support of the aforementioned technologies, has the more explicit effect of bringing production costs down.
- The drive to create alliances with other sectors, music and sound production.

The performing arts, including music, theatre, dance, circus and the lyric arts, with two main areas of activity:

- Digital and environmental transformation of performing arts and music management structures.
- Innovation and infrastructure updates in performing arts, with particular emphasis on ecological transition of equipment (light, sound and air conditioning) and digitalisation of management processes (ticketing, CRM and ERP).

Within these, four focal points of innovation have been identified:

- After the performing arts gave up digital distribution of content, the strategy in many companies has been to focus on use of distribution platforms as added value components for production and live performances. Two examples clearly illustrate this:
    - Platforms for generation of added value layers in scenic distribution which include reinforcement content (interviews with actors, stage directors and playwrights) or generation of didactic units as add-ons to the director's work with the aim of opening up a secondary market for sales generation.
    - Withdrawal from destination platforms and the return to open platforms with conversion through sponsorship, distribution in unconventional spaces (penitentiary units, care homes) and advertising.
- Generation of communities, with a return to open linear programming on generalist digital platforms or on micro-video social media, Tik Tok.
- Backing production models with development of a) productions that specialise in exhibition in unconventional spaces without the 'four wall' technical setup or for secondary, education channels; and b) generation of production spaces and artistic residences.
- Alliances with the tourism industry and fostering of complementary content such as dramatised visits distributed on digital platforms, or the development of complementary dramatic content with culinary experiences.

Setting aside technological innovation models (in which the industry is already far ahead of other disciplines), in the particular case of music, the following stand out:

- New types of festivals and promotion of projects in rural environments, such as ECOS, which create a single programme by grouping performances by children, generalist performances, professional events, and residence and creation centres.
- Once again, collaboration with the tourism industry to develop tourist routes linked to immaterial music culture and festivals held in unconventional locations.

Cultural heritage and tourism, which prioritises refurbishment and enhancement of heritage as a tool for creating added value in connection with other industries. This translates into:

- Transformation of cultural spaces categorised as tourist spots.
- Use of technologies and experience generation, with a specific focus on the creation of themed routes with a link to culture. These routes are, in particular, the backbone of packages in depopulated areas of Spain.

The focal points of innovation are underpinned by the following:

- Technology applied to the visit or the experience. Historical recreations in virtual reality or augmented reality models, fostering the development of digital twins thanks to photogrammetry as a preservation tool and as an element for generating delocalised visits to the landmark.
- Technologies linked to the production of tourist guides using artificial intelligence, generating chat box across multiple channels and platforms.
- New projects and models for visitor centres linked to the generation of immersion visits that can create a physical presence in visitor centres (that is, the place of destination) and generate content that can attract visitors from within the visitor's source market.

We can extract some strong ideas from this range of lines of innovation that outline the trends in cultural business models and that could be used in the publishing industry to optimise certain processes and management models in the book value chain.

1. Technology as the force behind innovation and as a channel for process, in which extended realities and artificial intelligence predominate as support tools for production rather than as the final product.
2. New platforms as a means of generating communities with a return to the generation of schedules on multi-platforms, including traditional ones and social media.
3. Alliances. In this field, between culture and industries that facilitate promotion and use of assets and experiences in culture sectors (tourism, entertainment and education).
4. Experience exchanges. In this sense, the case of what we might call 'reverse imports' is significant when we refer to the transfer of the on-demand printing model in the book industry to the world of fashion and sales.
5. The fight against accelerated product obsolescence and stock elimination, striving for delayed product obsolescence in all cultural activities. For example, in staging. Avoiding stocks as a deficiency in the production process.
6. The circular economy as a tool for change in products and in elements of production.

RENODO