

CURRENT SITUATION IN PUBLISHING INDUSTRY OF VIETNAM

X. V. Hoang

*PhD Student,
vinhhoangxuan@gmail.com,
0000-0001-5839-3458,
Vietnam Academy of Social Sciences,
Hanoi City, Vietnam*

Abstract. Practice shows that the number of trained staff is low compared to demand. In addition, the training and professional development for publishers are less interested in other positions, especially at the local level due to the perception that distribution of books is a purely business activity, not realizing that the use of publications has cultural significance. Organization of the publication market has its characteristics.

Keywords: publication; printing; distribution; traditional model; library in schools; readers; publishing industry of Vietnam; publishing company.

1. VIETNAMESE MODELING AND STRUCTURE OF PUBLISHING INDUSTRY

The publishing industry of Vietnam is based on three pillars: publication, printing

and distribution. In fact, in Vietnam today has identified three major models in the publishing sector:

Figure 1. The traditional model of the publishing sector

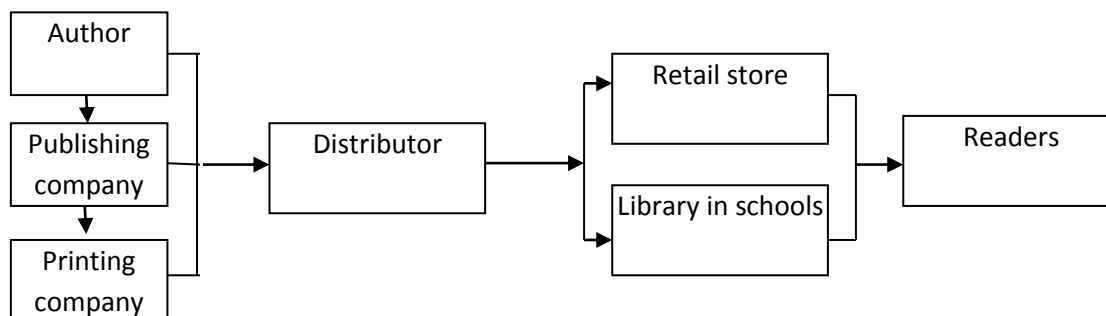


Figure 2. The traditional model of publishing sector when having internet

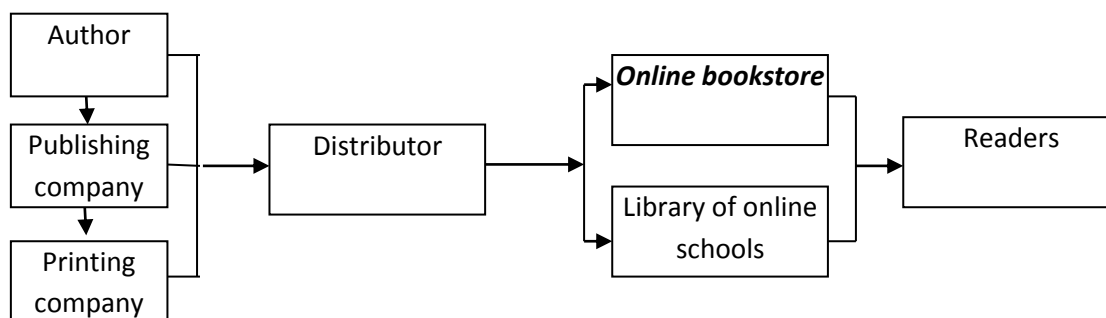
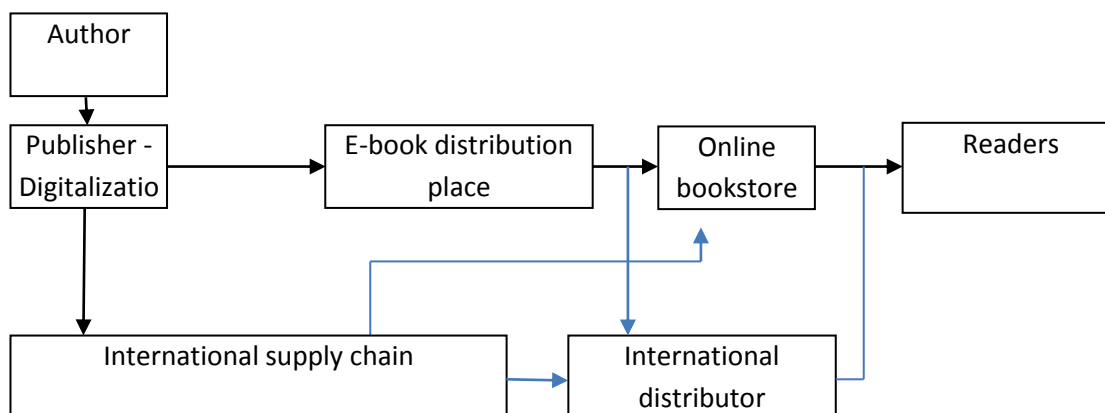
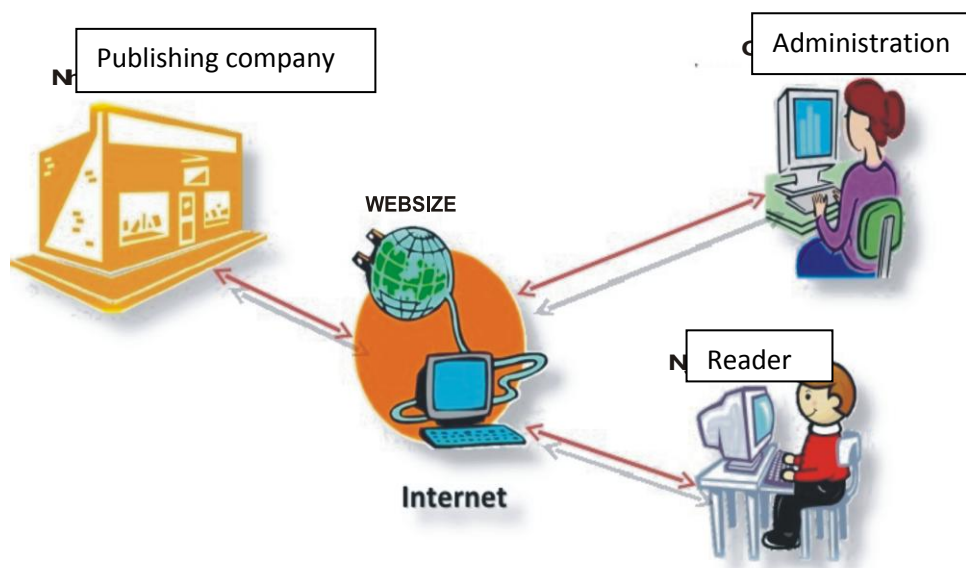


Figure 3. Electronic book publishing model



With the e-book model, books are only distributed through e-commerce and distribution through reading to readers.

Figure 4. Electronic book distribution model



2. VIETNAMESE SITUATION OF PUBLISHING SECTOR

2.1. Some achieved results

In the period from 2012 to now, the developing speed of the publishing sector has been maintained; the quality of some activities has changed positively. Targets for book

titles (including non-business documents) and printouts for each title increase [2].

Particularly, since 2015 electronic publications have been published by many publishers. Most electronic publications are transferred from paper books or published in parallel with paper books. By 2015, the number of electronic publications is 1,163 books

with 3,701,966 sales. By 2016, the number of electronic publications is 679 books (down 42 % compare to 2015) with 5,929,551 sales (up 60 % compare to 2015) [6].

Table 1

Number of books published in the period 2012–2016

Targets	Unit	2012	2013	2014	2015	2016
Number of book titles	Book	28.052	26.933	28.326	29.120	29.475
Whereby: By publishers	Book	24.683	23.603	25.047	29.014	29.390
Number of books	Million version	301,828	279,72	368,925	363,012	329,627
Whereby: By publishers	Million version	287,915	265,161	354.013	362.791	328,337
The average level of enjoyment	Book/person	3,4	3,2	4,1	4,1	3,6

In terms of business results, publishers have step by step updated their operation methods, mobilized resources to maintain and develop their production and business according to the set plan and achieve results

better. The numbers of publishers, who can balance and contribute to the budget by themselves, are increasing while the numbers of publishers, who lost, are decreasing significantly.

Table 2

Production and business results of publishing houses in the period 2012–2016

Targets, billion	2012	2013	2014	2015	2016
Total revenue	2.158,780	1.997,304	2.038,2	2.143,878	2.201,357
Paying the budget	44,524	43,974	50,308	67,744	68,550
Profit after tax	68,646	79,3	79,222	100,357	148,986

The organizational system of publishers is maintained and stable; capacity and level of some publishers have been strengthened. Some publishers have put application software into their publication management and have a significant effect on management. By 2015, more than 90 % of publishers have a website to promote their brand and introduce books on the internet, up nearly 15 times compared to 2004, with 25 % publishers participate in eBook Publishing [3].

In the field of printing and distribution

The printing industry of Viet Nam in recent years has seen a steady growth, contrib-

uted significantly to the growth of the national economy. According to statistics, up to now, there are about 13,500 printing establishments, in which there are about 1,500 industrial printing companies.

In the field of distribution, according to statistics, now there are about 14,000 distribution establishments in around whole country. The majority of state-owned enterprises have been converted into joint-stock companies; there is only a small number of enterprises operate in the form of one-member limited liability companies with 100 % State capital or non-business units. In the field of

distribution of publications, the State shall give conditions out organizations and individuals to participate in the market, and exploit the resources of the society for investment and development efficiently. Nowadays,

the publication market has been established with the participation of all economic sectors; many supermarkets, modern book centers are invested in provincial and city centers.

Table 3

Results of implementation of some major targets in the field of book distribution

Targets	Unit	2012	2013	2014	2015	2016
Total number of distribution books	Million versions	374	371	378	396,5	414,5
Total number of distribution cultural products	Million versions	102,3	99,7	102,5	109	114
Total revenue	Billion	2.907,3	2.949,5	3.008	3.300	3.918
Total import-export turnover	Million USD	23,42	21,5	22	24,1	23,76
Where: + Import:						
▪ Books	Million versions	50	50	52	60	41,14
▪ Papers, magazine	Million pages	7,9	7,6	7,8	8,5	6,8
▪ Value	Million USD	19,8	17,8	18,2	20	19,86
+ Export:						
▪ Books	Thousand versions	365,5	371	378	392	400
▪ Papers, magazine	Million pages	6,32	6,4	6,5	6,8	6,8
▪ Value	Million USD	3,62	3,7	3,8	4,1	3,9

2.2. Current situation of human resources

In publishers, editorial teams play a very important role, especially in ensuring and improving the quality of publications. Currently, according to survey data by the Authority of Publication, Printing, and Distribution, 2016 personnel directly perform editorial tasks at 60 publishers about 1,193 editors, accounting

for about 20.7 % of the total workers in the Publishers (about 6,500 people)

According to a survey of some publishers, the editor's average editorial rate is 1.00672; In absolute terms, in 2016 only 10 more people than in 2012. This is consistent with the situation of the publishers because the proportion of editors in the total number of the labor of the publishers is quite low [8].

Table 4

Number of editors of some publishers

	2012, person	2013, person	2014, person	2015, person	2016, person
<i>Total</i>	368	381	375	371	378
Whereby:					
<i>Hue University</i>	2	4	5	5	5
<i>Ha Noi of Education University</i>	7	10	9	14	16
<i>Information and Communication</i>	12	15	18	19	18
<i>Hong Duc</i>	6	6	8	8	8
<i>Political Theory</i>	7	7	7	8	8
<i>Female</i>	15	17	16	17	18
<i>National Army</i>	23	22	26	26	25
<i>Kim Dong</i>	31	35	34	34	36
<i>National Culture</i>	10	12	12	12	12
<i>Labour and Social Publisher</i>	15	12	12	12	10
<i>Viet Nam of Natural resource – Envi- ronment and Map</i>	70	65	65	60	60
<i>Agriculture</i>	18	17	17	17	17
<i>Da Nang</i>	-	-	8	7	6

On the editorial ratio compared to the total number of labors in the publishers. The percentage of editors compares to the total number of employees in the Publishing industry, there are many changes following

other directions, in which the most notable thing that is the lowest percentage in 2013, that year has the largest number of publishers in during last years (64 publishers).

Table 5

Results of the survey on the ratio of editors compared to the total number of employees of some publishers

	2010	2012	2013	2014	2015
Total labors (person)	1664	1689	174 2	167 5	1622
Number of editors (person)	368	381	375	371	378
The ratio of editors compared to the total number of employees of some publishers (%)	22,11	22,56	21, 53	22,1 5	23,30

About editorial work (seniority in the profession): Editors of publishers are formed from a variety of sources, with varying degrees, experience and age differences. There

are still some editors in the publishing industry who have worked for over 20 years, some of whom are over 10 years old. However, besides the number of editors mentioned

above, at present, in the publishers the number of editors with a seniority of 10 years or less is quite high.

About the age structure: At present, in the rooms, editorial boards of publishers, young staff force about age and age occupation is quite high [7]. Most of them are well-trained, have great achievements in work and study, and make important contributions to editorial work. However, for new editors, editorial tasks such as drafting, editing/editing the content of the manuscript, working/exchanging with the author/translator and

making sure the annotations, tables, etc. are also overwhelmed with them because of their limited knowledge of the editorial - publication is not enough to do them.

About the professional and the form of training

- Regarding professional training, according to the survey of the Department of Publication, Printing, and Distribution, the number of editors in publishers is specialized in social sciences (literature, arts, history, philosophy) account for 66.5 %, natural sciences account for 28 %, publishing majors only 5.5 %.

Table 6

Surveying results of the professional and training form of editors in some publishers

	2010	2012	2013	2014	2015
Total editors (person)	368	381	375	371	378
Editors who were trained about professional (person)	325	335	329	323	334
Editors who were trained about distribution (person)	43	46	46	48	44
Editors who graduated in the formal form (person)	320	340	333	334	341
Editors who graduated in the informal form (person)	48	41	42	37	37
The ratio of editors who were trained about professional (%)	88,32	87,93	87,73	87,06	88,36
The ratio of editors who were trained about distribution (%)	11,68	12,07	12,27	12,94	11,64
The ratio of editors who graduated in the formal form (%)	86,96	89,24	88,8	90,03	90,21
The ratio of editors who graduated in the informal form (%)	13,04	10,76	11,2	09,97	09,79

The form of training shows that the number of editors, who graduated in the formal form, has increased significantly. In 2015, the number of these editors has increased by about 6.6 % compared to 2010 while the number of editors, who graduated in the informal form, has decreased only having 77,08 % compared to 2010. Along with that, the rate of editors, who graduated in the for-

mal form, also increased, from 86.96 % to 90.21 % [2].

About assessment of the quality and effectiveness of the work: According to the results of the survey, when asked about the editorial staff at the publisher follow to 12 criteria, experts, leaders, managers of publishers are evaluated quite well (see in Table 7).

*Table 7***Evaluating editors follow to some criteria**

No	Criteria	Bad, %	Fair, %	Good, %	No answer, %
1	About quality in general	0	13,8	79,3	6,9
2	Understanding about Law on Publication and related legal documents	3,4	34,5	58,7	3,4
3	The understanding process of draft	0	17,3	79,3	3,4
4	Understanding clearly about target audiences of books that they are editing.	0	20,7	75,9	3,4
5	Understanding about basic skills of draft editing	0	13,8	82,7	3,4
6	Ability to exchange content with collaborators	0	34,5	62,1	3,4
7	Negotiation ability with collaborators	0	51,7	44,8	3,4
8	Ability to coordinate teamwork	3,4	55,2	37,9	6,9
9	The spirit of learning, improving the level	0	20,7	75,9	3,4
10	Responsibility	0	6,9	89,7	3,4
11	Professional ethics	0	0	93,1	6,9
12	Love of job	0	31,1	65,5	3,4

Of the 12 criteria for the editors mentioned above, criteria that require time to accumulate, are underestimated such as the ability to work together in a team that is underestimated, then capacity of negotiation with collaborators, ability to exchange content with collaborators; the criteria belong to quality of editors are not the as high as the spirit of learning, improving the level, knowing the object of the book they are editing, the sense of responsibility. Besides, some professional criteria such as understanding about Law on Publication and related legal documents, the understanding process of

draft, understanding about basic skills of draft editing are not highly rated, pretty average. This partly reflects the weakness of self-improvement. These are the issues that need attention when evaluating the quality of editorial staff at publishers [6].

- Current status of human resources in printing and distribution

With nearly 50,000 employees, printing workers are increasingly approaching modern and advanced equipment. The leaders of the units and print enterprises are also trained in professional skills to master their equipment and machinery.

Table 8

Labor Statistics for Printing in 2016

Labor				Educational level				Skill level				
				Bachelor		College						
Total	Female	Manager	Worker	Printing	Others	Printing	Others	Grade 2-3	Grade 4	Grade 5	Grade 6	Grade 7
43320	18465	5647	37673	1150	3050	2880	7499	20000	12051	12051	2450	13220

The above data show that highly educated and highly educated labor in the printing sector is very low. Due to the process of converting the printing technology from Typo to offset printing, senior technicians of the old technology will not be skilled in the new printing technology. Technical staff in the previous period was mainly trained staffs abroad (the Soviet Union or Germany). In recent years, these staffs are not significant. Now we have trained ourselves in printing technology. Thus, in both quantity and quality, human resources in the printing industry

are now relatively weak, not commensurate with the development of the sector.

* Human resources in the field of distribution

In contrast to the human resources of editors, human resources in the field of publishing and reprint are relatively abundant, with the supply of training from the University of Culture, College of Culture Ho Chi Minh City, or through joint venture training of schools, annual human resource in the distribution sector is about 16.000 person.

Table 9

Labor statistics of the distribution sector in 2016

Explanation	Labor classification					Remarks
	Total	Graduate	Undergraduate	Intermediate	Not education	
Culture – information sector	3.540	36	1.130	1.040	1.334	
Education and training sector	1.956	39	625	680	552	
Other economics sectors	10.900	21	3045	3.180	4.654	
Total	16.496	96	4.800	4.900	5.796	

According to the above statistics, the number of non-state book publishing laborers is high (over 60 %), the number of laborers in publishing sector of private economics component without training also comprise a high percentage (35 %)

However, the practice also shows that the number of trained staff is low compared to demand. In addition, the training and professional development for publishers are less interested in other positions, especially at the local level due to the perception that distribution of books is a purely business activity, not realizing that the use of publications has cultural significance, the organization of the publication market has its characteristics.

CONCLUSION

The study clarified a number of issues such as:

- The role of IT in the development of the publishing industry in Vietnam.
- Research on the structure and model of the publishing industry in Vietnam.
- Policies affect the publishing industry.
- Research on the impact of science and technology on the publishing industry today.
- Research and evaluate the current human resources of the publishing industry.

These contents will be an important premise to be able to study and propose solutions to "Develop human resources in Vi-

etnam publishing industry in the trend of integration" in the following topics.

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