As I departed the Tim Hotel Italie, it was a cool and crisp morning in Paris. I had just completed a very successful four day meeting of the International Color Consortium (ICC) where we organized a Digital Print Day that was attended by over 100 graphic arts professionals from around the world. March in Paris is still rather chilly and it was a dreary day and I wondered what the weather would be like in my next destination... Prague. Getting to Prague isn’t the easiest thing to do as I discovered. With no direct flights from Paris to Prague, I had to connect through Frankfurt which made for a longer day. So, as I sat in the airport van I began to focus on the activities upcoming. This would be my first of many trips to promote PRINT 09 to the printing industry around the world, and we also organized a mini-trade mission to explore the opportunities for NPES members in this country. Why go to the Czech Republic and why promote the PRINT show there? As you may recall from earlier articles, the PRIMIR “World Wide Market for Print” study found the fastest growing region in the world from 2000 to 2006 was Eastern Europe. It grew 145% over that period and was forecast to grow another 51.4% by 2011 and be a $22 billion market, although this forecast has been affected by the global economic downturn. The Czech Republic is one of the larger markets in the region and being in Central Europe (not Eastern Europe) would be relatively easy for NPES members to enter... especially if they were already established in Western Europe. So when I knew I would be in Europe for the ICC meetings, it made sense to take the relatively “quick hop” over to Prague and invite some members to join me.

The NPES global team worked with the U.S. Commercial Service specialist, Zdenek Svoboda and the leading magazine serving the printing industry Svet Tisku (World of Print) and their publisher, Martin Jamrick and editor, Ivan Dolezal to organize a luncheon to promote PRINT 09 and visits to five leading printers in Prague. Two NPES members, Delphax represented by Ian Jaggard, Managing Director, Delphax Technologies Ltd, and Fiberweb with Steve Major, European Sales Manager attended and participated in the trade mission. The reception/luncheon was attended by over 25 individuals from all facets of the Czech and Slovak printing industry. Leaders of the various printing associations, editors, educators—plus an interesting mix of companies using sheet and web lithography, flexography and digital, continued on page 3

(Foreground left to right) Ivan Dolezal and Ian Jaggard learn from Jaroslav Skudrka that a state-of-the-art Heidelberg Speedmaster is the workhorse at PB tisk.
chairman’s perspective

Hank A. Brandtjen, III
NPES Chairman
President, Brandtjen & Kluge, Inc.

Mind Over Matter

I recently turned 50. Not that I mind, but it does matter to me. Turning 50, in itself, is not a problem, since ten years ago I turned 40 and that was no big deal. So why is 50 such a milestone? When I get right down to it, it’s because I feel older. Now, when I want to read a menu or sign off on a credit card slip, I have to slip on my glasses. Before I could even write this column, I had to find my glasses just to read the computer screen. And, with any challenging physical activity, I find that it requires more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles.

However, turning 50 certainly beats the alternative. That being said, I find myself reflecting on the past and considering the future. As for the past, I’ve got no real regrets. Mistakes? Yes, more than a few. But, I believe that if you introduce me to someone who has not made a mistake, I’ve just met a person who is not willing to make a decision. So the past, mistakes and all, should be a learning experience. To paraphrase an old adage: make one mistake, move on; make the same mistake again, shame on me. Which brings me to the present and the future.

My life is focused around two main areas: home and work. But lately, with the economy and work,lately I feel like I’m carrying around a piano! Sometimes I wonder if I could even write this column, I had to find my glasses. Before I could even write this column, I had to find my glasses just to read the computer screen. And, with any challenging physical activity, I find that it requires more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles. And my back—don’t get me started—more training and that, regardless, the end result is sore muscles.

This past weekend I participated in the ‘Tour of the Unknown Coast’ in Northern California, a grueling test of my endurance that was 100 miles long with over 9,000 feet of climbing in a single day! It was advertised correctly, as I can attest) as one of the hardest century rides in America, with the last 20 miles topped off by a 14 degree climb aptly called ‘The Wall,’ followed by the ‘Endless Hills.’ Although I was riding with friends, I brought my work with me. But the best thing I did was never open it. I took time out for me. Heading home, although tired to the bone, I was mentally refreshed. What I choose to do with my mind does matter, now more than ever.

SAVE THE DATE!

NPES 2009 Annual Meeting
RECOVERY 2010: STRATEGIES FOR THE ECONOMIC UPTURN

The Fairmont Turnberry
Isle Resort & Club
Aventura, Florida

REGISTER NOW!

NPES 2009 REGIONAL MEETINGS:
ON THE ROAD TO RECOVERY!

- June 12, Dayton, OH
- June 15, Chicago, IL
- June 25, Teaneck, NJ
- June 26, Boston, MA

ECONOMIC TIMES CALL FOR REVOLUTIONARY SOLUTIONS!

Aptly themed “On the Road to Recovery,” this year’s NPES Regional Meetings are relevant and revved-up for 2009 to deliver the most up-to-date economic and trend information you need to move your company forward NOW—despite the current recession.

WHAT YOU WILL LEARN

Each session will kick-off with timely and revealing up-to-the-minute presentations by industry economic ‘guru’ Dr. Joe Webb and print technologies expert Frank Romano for a one-of-a-kind learning experience. Plus—they’ll reveal the ‘hidden’ opportunities to position your company to win in the impending upturn!

TRAVEL BUDGET SLASHED?

No problem! This is the one industry event that you CAN attend because these popular and informative update events come directly to you!

PROGRAM AT-A-GLANCE

Sessions will be held from 8:30 a.m. to 2:00 p.m. and include a continental breakfast and lunch.

NPES 2009 “STIMULUS SPECIAL”

For NPES Members only: register at 50% off the 2008 program fee.

FOR MORE INFORMATION AND TO REGISTER VISIT:
WWW.NPES.ORG
Czech Republic continued from page 1

both large and small, and even the largest printer in the country were in attendance, so it was a great start to our PRINT 09 promotion in the region.

**PB tisk s.r.o.**

Our first visit was to a book printer about an hour outside of Prague. As with many printing companies in Central and Eastern Europe, PB tisk was founded in 1989, right around the time the wall came tumbling down. It’s quite hard to find a printer who has been in business longer than 20 years, although it is possible as we discovered the next morning. So, not surprisingly their facility was brand new!

Our host, Jaroslav Skudrna, explained that they print about 60% soft cover books and 40% hardcover for about 400 customers; 40% of their output is exported with most going to Germany and Austria. In 2009, they printed between 4 and 5 million books with an average run length of 1,500. According to Skudrna, their biggest challenge is finding new customers... sounds familiar doesn’t it? New equipment, organized workflow, and tidy and clean sums up their operation. From CtP to a new Heidelberg Speedmaster that fed Kolbus perfect and case binding machines, PB tisk was a state-of-the-art operation that would rival any U.S. plant.

After our hour ride back to the Imperial Hotel, it was off to find some local Czech cuisine to recharge our batteries for our four plant visits the next day. By the way, if you’re an Art Deco aficionado (like me), the Imperial Hotel is a gem and was recently restored to its late 1920s’ splendor. It was so fashionable that during the war, it was taken over by the Nazis to house their officers. During the iron curtain period, it fell into complete disrepair but was reconstructed back to its original look between 2005 and 2007... a ‘must see’ when you’re in Prague.

**Svoboda Press s.r.o.**

Day 2 began with a visit to the largest printer in the Czech Republic, Svoboda Press. Unlike PB tisk, the outward appearance of the facility was more like a state-owned, communist facility, and for the first time I felt like I was behind the iron curtain. There was a good reason as Svoboda was founded in 1950 and state owned until 1989. In 2001, the company was bought with financial equity from the U.S. and today it’s owned by a UK capital firm. It was originally formed to print hard cover books but today prints 34 titles of magazines on web-offset presses. Svoboda employs 370 people and has annual turnover of between $70 and $75 million euros. The plant operates 24/7 year round except for three days; 25% of their volume is exported to Germany, Scandinavia, UK, Poland and the Ukraine.

Our host, Martin Chalus, Managing Director, took us on a tour of their facility which houses seven manroland heat-set web offset presses. The presses are fed by Creo CtP systems and they have a full bindery with saddle and patent binding capabilities. Although most of the equipment was relatively new, they did have a 20 year-old POLYM AN press that was still operational for some jobs.

**Eclipse Print a.s.**

Everywhere you go in Prague, Warsaw, Poznan, and I am sure most other Central European cities, wide format printing abounds and Eclipse is one of the major producers of outdoor advertising and point-of-purchase displays throughout the region. With plants in Poland, Hungary, the Czech Republic and Slovenia, Eclipse is well positioned to be the leader in this marketspace.

We met with Vaclav Nosek, Managing Director who explained that their business is about 50/50 between outdoor advertising and P.O.P. With 400 employees and $30 million euros in sales, Eclipse is the largest provider of these products in the region.

A tour of their operation revealed the most eclectic mix of technologies I’ve ever seen under one roof. They had dozens of wide format printers, which you would expect, but they also had a manroland 900 sheetfed press and a SVECIA screen printing press producing extremely high quality point-of-purchase materials. Die-cutting, laminating, stitching and sewing complemented their offset, screen and digital presses.

**Branaldi, s.r.o.**

The newest and youngest company we visited was Branaldi s.r.o., founded in 1997 in Brandýs nad Labem (outside of Prague). The company is engaged in the development, processing and production of atypical products mainly from cardboard, paper and plastics used for marketing sales support (point of sale or point-of-purchase). They also specialize in the development and production of sales displays, gift and presentation packaging, advertising banners, and a comprehensive series of advertising for the sale and promotion of its products. Another spotless, state-of-the-art facility, Branaldi housed a huge KBA Rapida 162a large format offset press along with CtP, die-cutting, laminating and automated cutting.

As we left Branaldi and headed back to the old town area of Prague, Warsaw, Poznan, and I am sure most other Central European cities, wide format printing abounds and Eclipse is one of the major producers of outdoor advertising and point-of-purchase displays throughout the region. With plants in Poland, Hungary, the Czech Republic and Slovenia, Eclipse is well positioned to be the leader in this marketspace.

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GASC Provides “Economic Stimulus” Plan for PRINT 09 Exhibitors

In a decisive response to the current economic situation, the Graphic Arts Show Company (GASC) announced the PRINT 09 Subsidy Plan, a stimulus package to reduce for every exhibitor the cost of participating in this year’s global show to be held September 11-16, 2009 in Chicago’s McCormick Place. Supporting this unprecedented financial relief package are GASC partners the National Association for Printing Leadership (NAPL), the Printing Industries of America, and NPES The Association for Suppliers of Printing, Publishing and Converting Technologies (NPES).

“"I want you to know that we are very pleased with your ‘stimulus plan’... because of that we are planning to bring in two additional machines.”
—Bob Morton, President, Best Graphics, Inc.

“In these troubled times, we can’t settle for business as usual,” said Ralph Nappi, GASC President. “That is why GASC has stepped forward with the PRINT 09 Subsidy Plan to support the companies that provide equipment, products and services to the graphic communications industry. Through this subsidy plan, we will be able to present the kind of robust, comprehensive industry exhibition and conference that attendees have come to expect from PRINT and ensure a productive, valuable trade show experience for exhibitors as well.”

GASC has provided two stimulus plan options for exhibitors participating in PRINT 09. Option one is designed for companies with heavy machinery that occupies a large percentage of their booth space, which pays for unlimited machinery material handling at the show site. The second option features limited material handling, but encompasses both machinery and non-machinery at the show site.

Altogether, GASC expects to offer up to $3 million in credit through the PRINT 09 Subsidy Plan. Nappi estimates average exhibitor savings will range anywhere from $550 to $165,000, depending on the size of exhibitors’ booth space.

GASC received immediate favorable responses to the plan from numerous PRINT 09 exhibiting companies including Bill Owens, Product Marketing Director, Xitron, Inc. who states, “The PRINT 09 stimulus program shows the GASC Board understands the challenges faced by our industry and has taken action to provide direct assistance to the membership. The program will allow Xitron in turn to focus more on promotion and incentives for our dealers and prospects attending PRINT 09. We appreciate the support provided by the entire GASC team and its Board.”

Bob Morton, President, Best Graphics, Inc. advises that, “I want you to know that we are very pleased with your ‘stimulus plan’... because of that we are planning to bring in two additional machines.”

Adding her enthusiastic support for the plan, Nancy French, Manager, Trade Shows & Events for Videojet says, “As a long standing exhibitor at GASC shows, I was more than thrilled to receive the news about the offerings under the economic stimulus plan being offered. My company, Videojet, is in the middle of the spectrum of exhibitors—not small but not huge either. It was exciting to learn that GASC is a true partner and fashioned the subsidy plan to cover all exhibitors.”

For complete information about the PRINT 09 Subsidy Plan, visit: http://www.print09.com/Exhibiting/Why-Exhibit/Economic-Stimulus-Plan.aspx

Prague, it was clear to me that print is alive and well in the Czech Republic. The PRIMIR “World Wide Market for Print” study proclaimed Central Europe an exciting and fast growing region for print and everything we saw supported this. Despite the global economic recession, Central Europe is still growing, although at a slower rate than before. In fact, according to a recent study by Ernst and Young in Poland, only seven of 24 European countries experienced growth in the 4th quarter 2008 and five of them were from Central/Eastern Europe (Bulgaria, Romania, Poland, Slovakia and the Czech Republic). It stands to reason that when the global recession ends, this region will return to its fast-paced growth trend as before.

For this reason, NPES is organizing a Central and Eastern European Print Industry Summit, November 17-18, 2009 in Warsaw, Poland. Co-organizing the event are Vidart and Print Partner magazines, the leading publications to the printing and print buying industries in Poland. The purpose of the program is to provide a superior networking forum for NPES members to meet distributors and printers from the region and begin, or accelerate business there. Economically priced sponsorships are available to NPES members interested in this exciting market. For more information including a prospectus, contact NPES Global Team staffer Pernilla Jonsson at e-mail: pjonsso@npes.org.
2009 Postal Summer Sale

In an effort to increase Standard Mail volume, the United States Postal Service (USPS) has filed with the Postal Regulatory Commission (PRC Docket R2009-3) a Standard Mail Volume Incentive Pricing Program that will roll back postage rates on Standard Mail letters and flats from July 1 through September 30, 2009. To be eligible for the ‘Summer Sale,’ mailers must have dropped more than one million Standard letters and/or flats between October 1, 2007 and March 31, 2008. The Direct Marketing Association estimates that this criterion will make approximately 3,250 mailers, which account for about 75 percent of Standard Mail volume, eligible for the sale.

Eligible mailers will pay full postage during the summer sale period, but will receive a 30 percent credit on the average per-piece price on the incremental volume of Standard Mail letters and flats recorded during the program period, over a specified threshold.

The threshold is calculated by comparing the mailer’s volume between October 1, 2008 through March 31, 2009 with volume during the same time period a year earlier, and applying that factor to volume mailed during the ‘Summer Sale’ period. For example, if a mailer sent 1.1 million pieces between October 2008 and March 2009, compared to only 1 million between the same dates a year earlier, the mailer’s threshold would be 10 percent above the volume sent between July 1, 2008 and September 30, 2008.

In order to prevent mailers from shifting previously planned mailings from October 2009 into the ‘Summer Sale’ period, a mailer’s rebate will be reduced if its October, 2009 volume is less than the average volume increase calculated above. Rebates will be credited to the mailer’s permit account before December 31, 2009.

A mailer’s volume threshold will be calculated by aggregating mail from all of its permits, ghost permits and subsidiaries and business names. Mail entered under a mail service provider permit will also be credited to the mailer, provided it documents its volume entered under the permit. However, mail service providers themselves have been excluded from the program in order to ensure that the anticipated volume increase will be new growth and not simply shifts in existing volume.

The Postal Service will send eligible mailers their individual thresholds as calculated by the USPS data system. Mailers may enroll in the program on the Web on or before July 1, 2009, after they receive their eligibility letter. Mailers who are not notified, or who do not agree with their calculated threshold, may appeal to the USPS.

The Postal Service expects an incremental revenue gain of between $38 million and $95 million (net of the 30 percent rebate). Costs to administer the program are calculated to be less than $1 million.

In its PRC filing the Postal Service pointed out that “the program is a prime example of how the Postal Service can utilize the pricing flexibility provided under the PAEA (Postal Accountability and Enhancement Act of 2006) in order to encourage increased mail volume and take advantage of the Postal Service’s excess capacity during the typically low-volume summer months.” Additionally, “the ‘Summer Sale’ incentive program will help to counteract the effect of the current economic recession on business mailers, and provides a boost to a key customer segment.”

PRC rules require action within 45 days of the May 1 filing, with a decision expected no later than mid-June.

For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.

NPES Opposes Union Power Grab: Urges Congress to Vote “No” on Employee “Free Choice” Act

NPES The Association for Suppliers of Printing, Publishing and Converting Technologies has strongly urged the 111th Congress to preserve the secret ballot in union organizing elections by voting “No” on the so-called Employee “Free Choice” Act (EFCA) also known as ‘Card Check’ legislation, S. 560 and H.R. 1495. In opposing organized labor’s top political priority, NPES represents the interests of over 450 member companies that supply more than 38,000 printing establishment customers, who together employ over one million workers nationwide.

Under current law, workers have the right to join or form a labor union and to collectively bargain over wages, hours and working conditions. However, in what would be a radical change in labor law, EFCA would permit a ‘card check’ system in union organizing campaigns that would allow a majority of a bargaining unit’s employees to privately or publicly authorize union representation without the protection of secret ballot elections.

This misguided legislation would overturn longstanding principles of fairness and balance in labor law; undermine U.S. economic growth and competitiveness under the guise of protecting free choice. In short, thousands of American jobs could be lost at a time when the economy is already in the greatest distress in anyone’s living memory.

Equally bad or worse is the legislation’s “binding arbitration” provision that undercuts the employer/employee relationship by putting government arbitrators in the workplace to mediate labor agreements. Under EFCA, if an employer and a union cannot reach agreement within a 120-day period, either party could call for a federal arbitration panel that would set binding (unchangeable for at least two years) language regarding wages, benefits and work rules.

Although EFCA proponents claim that union members support “Card Check”, according to a recent poll by the Coalition for a Democratic Workplace, cited by the National Association of Manufacturers, three out of four union households themselves actually strongly oppose the measure. And what was once thought to be a quick and easy victory for organized labor with the advent of the Obama Administration and large Democrat majorities in both house of Congress, has in fact turned into a major political battle between business and organized labor leaders with a political agenda, the outcome of which is uncertain at this time. In order to insure victory for democracy in the workplace NPES will continue to vigorously press the case against ‘Card Check.’

For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.
Ex-Im Bank: A Valuable Partner for NPES Members Seeking to Export

While industry suppliers may be leery of competing in the global marketplace during the current economic recession, the truth is that exports are more important than ever in these difficult times. In fact, many companies cannot afford not to export. Just as many U.S. companies are being forced to lay off workers—many others are maintaining or even adding jobs by exporting. NPES members can get the financing support they need to export from a valuable partner—the Export-Import Bank of the United States (Ex-Im Bank).

Consider this recent example: the Tensor Group, Inc., a small business with 45 employees in Woodridge, Ill. Tensor, one of the last web offset printing press manufacturers in this country, is exporting a printing press and accessories to a Turkish commercial printing company, backed by an Ex-Im Bank guarantee of a medium-term loan from UPS Capital Business Credit, Windsor, CT. Fully 99% of Tensor’s printing presses are comprised of parts made in the United States. “Ex-Im Bank’s support will allow us to keep our employees and to keep using our suppliers,” says Tensor Group Controller Ray Godbout. “Most of the suppliers are small businesses located within 50 miles of Woodridge. Through this transaction, we’re keeping a lot of people employed.”

The Tensor Group also has been a long-term customer of Ex-Im Bank’s Working Capital Loan Guarantee Program, selling printing presses to smaller newspapers in Europe. “In 2004, Ex-Im Bank helped us put together the export to Turkey of the largest single-width web offset printing line in the world,” Godbout says. “But Ex-Im Bank’s help goes beyond sales. Our local bank, which provides the loan, also benefits from Ex-Im Bank’s guarantee.”

**Foreign Buyers—an Untapped Vein of Gold**

Tensor is not alone in depending on export sales to maintain U.S. jobs. Approximately one in 10 U.S. jobs are now dependent on exports, and statistics from the U.S. Commerce Department show that export-related jobs on average pay better.

Although in the past, businesses could turn to private insurers for their lower cost and efficiency, it is true that lending standards have been tightening at many banks over the past year as private insurance companies pull back to reduce exposure. And, without coverage of their receivables, companies are bound to limit their international efforts. However, NPES members can turn to Ex-Im Bank for the financing tools to help them break into or expand their business in global markets.

Ex-Im Bank is the official export credit agency of the United States. For 75 years, its mission has been to help finance the export of U.S. goods and services to international markets to help U.S. companies expand their business overseas in order to create or maintain jobs for workers here at home.

Ex-Im Bank does not compete with private sector lenders. It provides export financing products that fill gaps in trade financing to keep trade flowing to emerging markets. In other words, Ex-Im Bank assumes credit and country risks that the private sector is unable or unwilling to accept, complementing the efforts of commercial lenders and helping them expand their business in emerging markets. Ex-Im Bank also helps level the playing field for U.S. exporters by matching the financing that other governments provide to their exporters, in short, supporting exports that otherwise would not go forward.

Ex-Im Bank is active in about 90 countries supporting every kind of export from capital goods associated with large infrastructure projects, to exports by thousands of small businesses including consumer products and services. We are legally mandated to find a reasonable assurance of repayment in every transaction we authorize.

**Ex-Im Bank Financing Tools**

- **Working Capital Loan Guarantees:** Ex-Im Bank’s working capital loan guarantee covers 90% of the principal and interest on working capital loans for pre-export costs.
- **Export Credit Insurance:** Ex-Im Bank’s export credit insurance protects mostly small-business exporters and their lenders against the commercial and political risks of a foreign buyer
defaulting on payment.  

*Loan Guarantees:* Ex-Im Bank's commercial loan guarantees enable American firms to offer foreign buyers competitive credit to win a sale of equipment and services.  

*Financing Enhancements:* Ex-Im Bank has enhanced several of its trade finance products to help counter the tightening of credit and the lack of liquidity in the export marketplace.  

*Korean LOC facility:* Ex-Im Bank also has approved a special delegated authority facility providing $2.9 billion in insurance cover involving letters of credit issued by 11 Korean financial institutions to help meet increased demand to insure U.S. lenders' confirmation of Korean bank letters of credit.

In summary, in these uncertain economic times, Ex-Im Bank can be the financing source for international sales by helping you:

- boost your borrowing power
- speed cash flow
- expand your sales
- enter new markets, and
- mitigate losses

To learn more about Ex-Im Bank financing products, key transactions, export opportunities, available training, insurance brokers that work with Ex-Im Bank and more, visit: www.exim.gov or phone: 1-800-565-EXIM (x-3946) to reach one of the eight regional offices nearest to you.

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# Print Buyer Behaviors Impact Printers and Suppliers

Changes in print buyer behaviors have trickle down effects on all participants in the graphic communications industry. In the past, most print buying was a ‘local’ activity, mainly supported by ‘local’ or ‘regional’ print firms who, in turn, were supported by ‘local’ dealers or distributors. The Internet and customer-facing web portals have exacted game-changing impacts on all participants in the graphic communications industry.

The changing dynamics of sourcing behavior prompted PRIMIR to commission Sherburne & Associates, in partnership with Print Buyers International, to evaluate the changing roles and practices of ‘print originators’ (from 2003 through 2013) to establish impacts throughout the print value chain. For the purposes of the study, a print originator is a marketer or a dedicated print buyer.

The study found that many print buyers are seasoned, tenured professionals who have a passion for print, understand the technologies, are involved in peer networks to stay abreast of the industry, and have long-standing relationships with their printers. On the down side, however, many of these individuals are viewed by their management as ‘print centric’ and are often not involved in the upstream marketing decision about which media to use for a campaign.

As the current economic crisis exacts its toll on corporations across the globe, the research team found that many of these ‘print buyer’ roles are being eliminated. The media purchasing responsibility then shifts to the marketing departments—often to individuals who are not savvy about print media, who are much younger, and who likely favor alternative electronic media. This alone has far-reaching implications for members of PRIMIR and NPES, with print volume already in a decline before the recent economic turmoil.

With the responsibility for print buying moving to the marketing department or to various business-line managers, it is increasingly difficult for the print sales representative to find the individual responsible for making those decisions. These new buyers need education as to the value proposition of print, when to use print-on-demand, opportunities from variable data promotions, and more. Out of sight, out of mind, print stands to lose even more market share. These new buyers perceive newer online media as ‘free’ or at least less costly than print—with no real data to support the actual ROI of that medium.

When print is called for, these new buyers will look to the Internet to source print, finding printers who have customer-facing web portals with benefits and offerings clearly defined. The sophisticated printer will actively pursue this new customer with a sales representative establishing a relationship to learn more about their business and develop solutions that involve print or the other value-added services they offer, as part of the media mix.

“Suppliers need to ensure that printers and their customers understand the ROI of adopting new technologies.”

The new relationships forged often remove geography from the equation. Print sourcing may, or may not be local—especially when the application is not time-sensitive.

There are several major implications for manufacturers of equipment and suppliers to the graphic communications industry. According to the study, “when articulating the value of new technologies, not only must suppliers ensure that the print service provider understands the return on investment for his own business, but suppliers must also help printers understand the return on investment these new products and services can deliver to their customers.”

Manufacturers need to be involved in a partnership with their printer customers (and on their own) providing education to the print originators and marketers about the various technologies and benefits of new technologies or processes, for example: print-on-demand, versioning, mailing and fulfillment, or one-to-one marketing. They might also provide education on reengineering their business processes to save time or money.

NPES members providing software solutions designed to make the buying and selling of print more efficient will continue to see opportunities as web-to-print, MIS, color management, and remote/soft proofing, and workflow solutions demand increases.

It should be noted that with geography becoming irrelevant, it will be more difficult for manufacturers to assess capacity needs, supplies demand, or dealer or territory requirements. One can no longer assume that because XYZ corporation is located in a specific region, that printing support for their products will remain in that region.

This PRIMIR study “Sourcing Behavior of North American Print Originators 2003-2013” will be published in late May and circulated exclusively to PRIMIR members.
news and notes

NPES CALENDAR

June 2009
TC130 Working Group 5
June 24 • Portland, Oregon

NPES Regional Meeting
June 12 • Dayton, Ohio

NPES Regional Meeting
June 15 • Chicago, Illinois

ICC Meetings
June 15-18 • Tokyo, Japan

NPES Regional Meeting
June 25 • Teaneck, New Jersey

NPES Regional Meeting
June 26 • Boston, Massachusetts

July 2009
PRIMIR Summer Meeting
July 20-22 • Asheville, North Carolina

CGATS/USTAG Joint Meeting
July 29-30 • Grand Rapids, Michigan

September 2009
PRINT
September 11-16 • Chicago, Illinois

GASC & GAERF Board of Directors Meeting
September 12 • Chicago, Illinois

TC130 Working Groups & Plenary
September 21-26 • Beijing, China

October 2009
NPES 2009 Annual Conference
"Recovery 2010: Strategies for the Economic Upturn"
October 24-26

Fairmont Turnberry Isle Resort & Club
Aventura, Florida

November 2009
ICC Meetings
November 5-7 • Albuquerque, New Mexico

Central and Eastern European Print Industry Summit
November 17-18 • Warsaw, Poland

March 2010
ICC Meeting
March 3-5 • Tokyo, Japan

May 2010
IPEX
May 18-26 • Birmingham, UK

June 2010
ICC Meetings
June 21-24 • TBD

NPES Member Booth and Pavilion
EXPOPRINT Latin America 2010
June 23-29 • Sao Paulo, Brazil

HURLEY’S TRADE-WISE DO TELL INTEL

Global Plan for Recovery and Reform—decisions made by the leaders of the world’s largest economies on April 2, 2009 at the London Summit

Leaders of the world’s largest economies agreed on a $1.1 trillion package of measures to restore growth and jobs and rebuild confidence and trust in the financial system. “This is the day that the world came together, to fight back against the global recession. Not with words, but a plan for global recovery and for reform and with a clear timetable,” said British Prime Minister Gordon Brown at the end of the London Summit of G20 countries on April 2.

The fiscal stimulus measures that countries have already announced would amount to some five trillion dollars by the end of next year, and would include a trade finance package worth $250 billion over two years to support global trade flows.

The G20 Summit Declaration set out six pledges that the 21 nations and the European Commission had agreed upon, as follows: restore confidence, growth, and jobs; repair the financial system to restore lending; strengthen financial regulation to rebuild trust; fund and reform our international financial institutions to overcome this crisis and prevent future ones; promote global trade and investment and reject protectionism, to underpin prosperity; and build an inclusive, green and sustainable recovery.

Principles to reform the global banking system included: bringing the shadow banking system, including hedge funds, within the global regulatory net; new international accounting standards; regulation of credit rating agencies; and an end to tax havens that do not transfer information on request.

Leaders of the big emerging markets unani mously expressed their support for and confidence in the Global Plan for Recovery. Dmitry Medvedev, President, Russia, stated, “Twenty or 25 years ago it would be impossible to imagine a situation when so different nations, with so different economies, various mentalities and historical traditions could sit down at the same table and be able to agree on how to act in such a complicated situation, and to do it fairly fast!” Luiz Inácio Lula da Silva, President, Brazil, said, “It was good, not only for Brazil or any single country, but for the hopes and the future of humanity.”

Hu Jintao, President, China, asserted, “We have the enabling conditions to tackle the financial crisis. As long as we strengthen confidence and work together, we will tide over the difficulties and achieve our shared goals.” Manmohan Singh, Prime Minister, India, manifested, “The G20 Leaders Summit has shown a way forward. Given the goodwill and the meeting of minds among leaders that was possible in London over the last two days, the world has a basis to begin solving the crisis. The international community can and must work together to do so.”

Commenting on the most important business development result of the Summit, Robert B. Zoellick, President, World Bank Group, announced the launch of the Global Trade Liquidity Program for developing countries, “a timely and targeted solution that will provide trade finance to support businesses across developing markets.”

Representatives of multinational and regional banks providing new trade finance have been invited to participate in the NPES Central and Eastern European Print Summit, to be held November 17-18 in Warsaw, Poland. For further information about registering for the Summit and sponsorship opportunities, contact Mike Hurley, International Trade Director at phone: 703/264-7212 or e-mail: mhurley@npes.org.