

Social Dialogue Committee for the Graphical Sector Work Programme 2019-2021

Introduction

The European social partners of the graphical industry established a European sectoral dialogue committee in 2013. Before this date, the social partners had regular meetings and exchanges of information and cooperated during the past in various ways. Since beginning social dialogue, the European social partners for the graphical industry have intensified collaboration, working together on various projects and joint initiatives. For example, the successful completion of two EU funded projects on socially responsible restructuring (2010) and future skills in the European printing industry (2013/2014). In addition, two joint statements on the European Timber Regulation (2015) and skills (2018).

Due to the success of Sectoral Social Dialogue over the past 6 years, the social partners decided to continue the process of cooperation at the plenary meeting of the graphical sector's social dialogue committee in September 2018.

The European sectoral dialogue of the graphical industry will tackle subjects of importance to the sector as a whole, but will not interfere with the autonomy of the national social partners in determining terms and conditions of employment in their national contexts.

This three year work programme serves as a guideline for the activities of the European social partners for the years 2019 to 2021.

Background

The graphical industry is part of the wider manufacturing sector that focuses in particular upon the reproduction of communication material. Its products range from newspapers, books, periodicals, business documents, greeting cards, identification documents and many other materials. Printing relies on associated support activities, such as bookbinding and plate-making services. Processes used in printing include transferring data from a plate, screen or computer file to a medium, such as paper, plastics, metal. The most prominent printing techniques are offset, gravure, screen and flexographic printing. More recently, printing companies have made a significant move towards integrating digital printing into their activities, opening the market to new features such as the personalisation of print, short runs or 'on demand' printing, and web-to-print services. In recent years, printing companies have also enlarged the scope of their activities to include the integration of value added services, such as database management for clients and/or the production of e-documents or websites.

The graphical industry in the EU comprises some 113,000 companies employing 620,000 people, and generates a turnover of some 80 billion Euros (2015 Eurostat figures). The industry is dominated by small and medium sized enterprises (SMEs), with 90% of the companies in Europe employing fewer than 10 staff.

The graphical sector is increasingly affected by the growth of electronic media, imports from low cost countries, structural overcapacity, concentration at the level of paper and ink suppliers and the fluctuating cost of these materials. This requires significant restructuring or adjustments to the offer of companies and the adaptation of available skills in a general context of pressure based not only on low margins, but also increasingly on environmental and ethical considerations. The image of printed products is suffering. Print is also now more frequently challenged by other media, but it has maintained its important position in the communications mix alongside newer channels. The industry has to evolve constantly to survive in this changing environment.

Print is not only seen as traditional, but the fact that print products are paper-based leads to environmental considerations from consumers that are in fact at odds with reality. Print is often not seen as the renewable recyclable resource that it is, but instead as a forest-destroying, environmentally questionable product.

Furthermore, the graphical industry was severely hit by the 2008 European economic crisis and is only now beginning to show signs of stabilisation (not recovery...), with turnover not expected to increase to pre-crisis levels.

Work Programme

For the years 2019 to 2021, the social dialogue committee of the graphical sector will address the following issues.

1. The technological, social and economic situation and trends of the sector at EU level

The graphical sector is in an ongoing state of change and evolution. As such, it is important for Intergraf, UNI Europa Graphical and their respective members, to have a complete picture of the technological, social and economic realities of the European graphical sector in its entirety. Such an overview must be informed through an accurate picture of the situation of the sector at national level, and it is crucial that the social partners at national and European levels are regularly updated on the situation of the European graphical sector if we are to improve our ability to anticipate change and develop a clearer vision on the possibilities for future developments in the graphical industry.

In order to improve understanding and raise awareness of the situation in the European graphical industry, Intergraf and UNI Europa Graphical will use their social dialogue meetings at European level to organise regular exchanges of information on the situation in the graphical industry and discussions on the current and future trends of the sector. These exchanges of information will be organised on the basis of presentations and discussions of national reports. Expert opinions from research institutes, other sectors or other bodies will be requested when necessary.

Depending upon the discussions that take place within the social dialogue, Intergraf and UNI Europa will decide on the best form that follow-up work should take.

Different possibilities can be envisaged, such as dissemination of information, preparation of publications and reports, joint opinions/statements, conferences, around specific themes, EU funded projects, etc.

2. Digitisation

The technology used in the graphical sector has undergone major changes, evolutions and revolutions over the years. In printing companies, adaptations to the latest technologies have taken place, with processes now highly digitised. As well as the more traditional manufacturing skills, IT and computer-based competences and other related soft skills are more important to the industry than ever before. Consumer studies are also significant with regard to digitisation, because the public perception of reading on paper vs. digitally affects various print markets (i.e. books).

The European social partners may work on the subject of digitisation in the graphic industry by:

- Monitoring developments in the graphical industry in the area of “digitisation”, “IT” and “new technologies”.
- Regularly discussing issues relating to digitisation and exchanging best practices.
- Monitoring new research published about digital vs. paper learning.

3. Demographics

Despite its use of modern technology and web-based services, the European graphic industry is currently characterised by an ageing workforce and lack of qualified labour. The average age of staff in printing companies is frequently older than 50, and younger generations often display a lack of interest to take up a job in manufacturing. The resulting demographic imbalance leaves the sector at risk for staffing shortfalls when older employees retire and are not replaced by new staff. Consequently, the demographic composition of the sector has a considerable impact on many of the topics dealt with in social dialogue. As demographic issues progressively become more urgent for the graphic industry, it is crucial for the European social partners to address this topic.

At the end of 2018, the social partners adopted a Joint Statement on Skills and Training in the Graphic Industry. The central skills challenges faced by the sector, as identified in this Joint Statement, all relate to demography:

1. The graphic industry suffers from an aging workforce and is already today lacking skilled workers.
2. With a decrease in demand over the past years educational institutes and organisations have reduced their offer, so that it becomes difficult to educate young people to become a printer. Thus the graphic industry is lacking the traditional skills to work at the machines.
3. It is difficult to attract young workers to the Graphic Industry which is erroneously not perceived as a modern and future-oriented industry.
4. For the new technologies that are used in our industry (IT skills, web design, databases...), the younger generation is very well educated to work in the

graphic industry, however, they do not choose this sector for their career.

The European social partners may work on the subject of demographics in the graphic industry by:

- Monitoring developments in the graphical industry in the area of “demographics”.
- Encouraging young people to take the VET path.
- Cooperating on current and future skills needs (see section 4, below).
- Cooperating on relevant image campaigns (see section 6, below).

4. Skills and Follow-up of the 2013/14 joint EU project “Future skills in the graphical industry”

It is crucial for the graphical sector's social partners to continue to analyse current and future needs for skills in the sector. The social partners therefore agree to further explore possibilities to cooperate on this issue. Work has been carried out under the previous Work Programme (2016-18) to follow up on the recommendations from our future skills project, such as the agreement of a Joint Statement on Skills and Training in the Graphic Industry (2018). However, many challenges identified still exist, so a continuance of this work is necessary.

The European social partners may work on the subject of skills in the graphic industry by:

- Addressing the relevant recommendations made in the 2013-14 future skills project.
- Promoting the report drafted during the 2013-14 future skills project.
- Monitoring developments in the graphical industry in the area of “skills”.
- Exploring further possibilities of cooperation between Intergraf and UNI Europa Graphical as well as the European Graphic/Media Industry Network (EGIN).
- Closely monitoring the development of skills needs of the sector in order to anticipate changes in skills requirements.
- Regularly discussing education and training needs, exchanging best practices.
- Regularly inviting educational experts to Social Dialogue meetings to share and exchange views.

Discussions on skills needs will cover the entire spectrum of traditional printing activities, as well as new services increasingly offered by printers – ranging from database management, to the creation of electronic documents, websites and interactive links between print and electronic media, etc. Consumer behaviour will also be addressed to ensure that the graphic industry can better anticipate future trends.

5. New business models and follow-up of the 2010 joint EU project on “Best practices in socially responsible restructuring of printing companies”

During the course of the previous Work Programme (2016-18), the social partners reviewed the 2010 joint project (consisting of a study and toolkit) about socially responsible restructuring, finding that the report is still of relevance to printing

companies.

The European social partners may work on the subjects of new business models and socially responsible restructuring in the graphic industry by:

- Addressing the relevant recommendations made in the 2010 socially responsible restructuring project.
- Promoting the report and toolkit drafted during the 2010 socially responsible restructuring project.
- Further updating and reviewing the materials developed within the framework of the 2010 project.
- Monitoring developments in the graphical industry in the areas of “socially responsible restructuring” and “new business models”.
- Developing other tools or actions to support social partners of the industry at all levels in dealing with restructuring in a socially responsible manner.

6. State aid and unfair competition

It has been a point of concern among Intergraf’s and UNI Europa’s membership that European structural and social funds could be used as illegal state aid which would result in unfair competition.

As a result, UNI Europa and Intergraf will monitor any complaints raised with the European Commission and may investigate the use of EU funds in different EU member states.

7. Image and Environment

The environmental sustainability of print products is important when it comes to the future of print and its public acceptance. Greenwashing (promoting the perception that a company’s digital processes are automatically more environmentally friendly than paper, which is not necessarily the case) is a common occurrence. In reality, paper is a highly recyclable and renewable resource, with 71.5% of paper in Europe recycled (European Paper Recycling Council, EPRC). The environmental sustainability of our industry is also supported by various certification systems.

The image of the graphical industry with regard to digitalisation is also crucial for the sector’s development. As a traditional manufacturing industry, print is frequently perceived as an old fashioned and not digitised industry. In reality, this is not the case. With the advent of new technologies and industrial restructuring following the 2008 economic crisis, print rapidly became a highly digitised and future-looking sector which offers many exciting and creative opportunities to young employees entering the job market. The social partners want to promote this.

The European social partners may work on the subjects of image and environment in the graphic industry by:

- Monitoring developments in the graphical industry in the areas of “image” and “environment”.
- Cooperating in existing print-positive campaigns, such as Two Sides and



Keep Me Posted.

- Exploring the possibility of further collaboration in a new attractiveness campaign.

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Signatures:

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