



INTERGRAF ACTIVITY REPORT

2020



Your European federation for print and digital communication



Representing
the European printing industry



Lobbying
European Institutions



Informing
about industry developments



Networking
between industry experts

FOREWORD

We are living in exceptional times. **COVID-19** presents an enormous public health challenge which is profoundly affecting our personal, social and professional lives. Intergraf's member associations have been working tirelessly to support printing companies at national level since the beginning of this crisis. At Intergraf, we have been **monitoring** the situation and developments at European level, **sharing** information between our members and **communicating** information to the European Commission to support their COVID-19 response. Although some containment measures have now been eased to allow more economic activity, we are still very much in the midst of this crisis. Intergraf will continue to support our members however we can.

In amongst the disruption, 2020 has been a special year for Intergraf because the association celebrated its **90th anniversary**. Founded in 1930, we have been the voice of the European printing industry for nine decades. We are extremely proud to have served this creative and adaptable industry for 90 years and we look forward to serving it long into the future.

This year, Intergraf has followed up on various **lobbying efforts** and **campaigns** following the 2019 EU elections - meeting regularly with **Members of the European Parliament** and **European Commission officials** to promote print. EU elections also bring a brand new timetable of **new and renewed EU policy issues**. The Secretariat ensures the printing industry is always recognised as an essential part of Europe's future in all EU policymaking.

In addition to all of this, our ongoing day-to-day work has continued, with events organised in London, Bordeaux and Brussels, and a market report published following our **Shaping the Future of Print** conference in February: **Commercial Print & Catalogues - Market Report**. We have also continued to contact you about important topics via our many communications channels, like the **Newsflash**, **News in Brief**, **Annual Economic Report**, **Economic Newsletter** and **website**. Moreover, the **Intergraf Young Talent Award** was awarded to a new recipient this year, after we received a large number of superb applications addressing recruitment and the image of print - subjects which we also focus on in our new **European Social Dialogue** project: **Print Your Future**.

We would like to offer our sincere thanks to Intergraf members for all of your hard work and dedication - especially during these challenging times. We look forward to continuing our important work with you during the next year and beyond.



Cees
Cees Verweij
President



Beatrice
Beatrice Klose
Secretary General

Intergraf's 90th Anniversary drinks reception, Bratislava, 2020



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Man takes photograph at Intergraf's Commercial Print conference, Brussels, February 2020





PART 1. KEY TOPICS

“The effects of this crisis on the printing industry are very diverse: demand for packaging print has quickly and dramatically increased, whereas other parts of print have been negatively impacted by the reduction of economic activity in many fields”

Beatrice Klose, Secretary General of Intergraf



PART 1.1. PRINT'S ROLE IN POST- COVID-19 EUROPE

C OVID-19 has laid bare the fragility of many aspects of our social and economic systems. This new and enduring reality will have far-reaching effects on the European printing industry. Reflecting the diversity of print, such impacts can be positive or negative, depending on the sub-sector. The printing industry remains an essential part of Europe's ecological and digital future, but a recovery of our sector depends highly on the re-bounce of the economy as a whole



IN FOCUS

Reinforcing the post-COVID-19 role of print

Intergraf ensures that our sector is always taken into account by providing the European Commission with **weekly updates** about how the crisis is affecting the European printing industry and what the industry needs. Such contacts ensure that the EU's crisis response supports our sector and that the printing industry is seen as an **important partner** in rebuilding Europe's economy.

For more information about Intergraf's public COVID-19 response visit our website: www.intergraf.eu

Mass event cancellations, social distancing and the (re)establishment of border controls are inevitably having their **impact on print**. During this crisis, it has not been uncommon for printing companies to see increased order cancellations, or decreased order levels, of up to +/- 80%, with consequent effects on turnover. Many are relying on bank loans or government funding, with bankruptcy a risk for some of the worst affected. More positively, there are also companies for whom demand has remained stable, or even increased, like printers of packaging

for food and pharmaceuticals.

Our members are well-placed to advise companies at national level about support for which they may be eligible to get them through this crisis. There is a **multitude of support** available (governmental and otherwise) for individuals and businesses in different countries if needed.

Intergraf **shares key information** with and between our members. We also monitor **European developments** so that our members, and the companies they represent, can access the support they need. This work secured that some parts of the printing industry was defined as an "**essential service**" early in the crisis (e.g. packaging for food and medicine). Alongside other industry associations, we also quickly flagged the importance of **synthetic ethanol** and **isopropanol** for our sector, with the European Commission rapidly reacting to our call by opening new supply channels.



ANALYSIS

EU policymaking after-COVID-19

The use of use of **digital technologies** has necessarily increased due to COVID-19. A **new virtual culture** has been emerging because of the shift from physical to digital interactions to meet our social and personal needs.

At European level, this will likely result in certain issues rising on the agenda. The interplay between **digital technologies** and the **environment** (i.e. how far a green economic recovery will be prioritised amid the growing use of digital technologies), as well as **online privacy** concerns in the age of contact-tracing apps and beyond, will all be salient issues. So will **social inclusion**, which is demonstrably supported by printed products.

“Brexit has been a topic at several of Intergraf’s Economics and Statistics Working Group meetings. BPIF has been closely monitoring the impact of Brexit on the printing industry and we share our analysis with other Intergraf members. Brexit does not diminish the importance and benefit of a continuous dialogue between our associations and companies to exchange on the future of print – in fact, quite the opposite.”

Kyle Jardine, Economist at the British Printing Industries Federation (BPIF) and Member of Intergraf’s Economics & Statistics Working Group

PART 1.2. THE IMPLICATIONS OF BREXIT

Following four years of uncertainty, the transition period of the UK's exit from the European Union has commenced. However, some clarity is still required. A trade deal must now be negotiated in order to determine the future relationship between the UK and EU27.

Lengthy and complicated talks culminated in an agreement in January 2020 which sets out the terms of the **UK's exit from the EU** and Euratom. The 599-page agreement includes a **transition period** lasting until 31 December 2020, and covers the areas of money (division of assets; debt), citizens' rights, border arrangements and customs, and other applicable laws and dispute resolution mechanisms. During the transition period, the UK ceases to participate politically in the EU's institutions but still has obligations in order to remain part of the Single Market until a new trade deal is in place. The UK has been pushing for a new **trade deal** to be agreed in time for January 2021.

From an EU perspective, Brexit represents a **significant loss** for the printing industry. The UK's share of the the printing industry is approximately 15% of the turnover of the EU28 in total. This



ANALYSIS

Trade deal timeline

Even before the **COVID-19 crisis**, EU negotiators expressed reservations about whether a broad trade deal could realistically be agreed in one year. Since the outbreak of COVID-19, which has consumed social and economic life, the **call to extend the transition period** has become louder. Trade talks were reportedly not advancing quickly anyway, with many contentious areas still under discussion. With European governments focused on controlling the crisis, it is unclear how far a trade deal will be prioritised in the coming year.

EU27+UK



98,000
companies
+ 11,000 from UK



505,300
employees
+ 97,700 from UK



67 billion
turnover
+ 12 billion from UK

New profile of the European graphical sector

share is similar for the number of companies and employees.

The consequences of Brexit on **trade** are still very uncertain. More than 40% of UK trade of printed products is within the EU. More than one third of the total EU traded printed products is exported from or exported to the UK.

More detailed information about the impacts of Brexit on trade is available in **Intergraf's Annual Economic Report**.



NEXT STEPS

Finalising Brexit

Once an agreement has been found between the negotiators, the **trade deal** can only be finalised upon confirmation of the UK and European Parliament and the governments of the remaining EU member countries. Some countries have laws which require a vote on trade deals in their parliament – or all five regional parliaments in the case of Belgium.

“[S]mall and medium-sized enterprises (SMEs) are finally getting the attention they deserve” in the EU’s SME Strategy. “There are 25 million SMEs in the EU. Two out of three employees work in SMEs. They are the backbone of our economy. It was long overdue for their interests to be taken more seriously”

Jens Gieseke MEP (Germany, EPP Group)

PART 1.3. RELATIONSHIP- BUILDING IN THE EUROPEAN PARLIAMENT

Strong relationships in the European Parliament help to secure an optimal regulatory environment for printing companies. Building such relationships is especially important following a European election, as there was in May 2019.



IN FOCUS

Promoting print to MEPs

Members of the European Parliament (MEPs) sit on different Committees and have different interests, so some policymakers are **more relevant** than others for the printing industry.

Following the 2019 EU election, Intergraf initiated a series of meetings with the most relevant new and returning MEPs. These relationships **amplify the voice** of printers when EU legislation is considered, securing the **best possible conditions** for printing companies.

Our contact with the 705 Members of the European Parliament (MEPs) necessarily begins with a **brief introduction** of the graphical sector, for those who may not know anything about print. In summer 2019, following the EU election, we **reached out** to all MEPs with a letter showcasing our sector.

The message of our first communication has since been **reinforced** via further contacts with relevant MEPs, such as those on Committees relating to competitiveness and the environment. We have also had contact with MEPs who have an interest in consumers and social inclusion via the Keep Me Posted EU campaign.

In these follow-up meetings, we discuss the **most pertinent issues** for our sector in more detail, securing that the printing industry is always taken into account when relevant legislation is considered in the European Parliament.

DIGITAL LOVES PRINT

AND PERHAPS YOU NEED PRINT MORE THAN YOU THINK?

THINK PRINT HAS NO PLACE IN YOUR LIFE?

Print surrounds us and plays a lasting role in our daily life. Print is the things we love, such as books, newspapers and magazines, as much as the things we need, like packaging, advertising, labels, transportation tickets etc. We also need to receive notices, through posters, art and wallpaper. Although digital provides quick and easy solutions, print continues to be a timely, reliable and tactile part of our lives.

THINK READING FROM A SCREEN IS THE BEST OPTION?

Print is tangible and accessible by all. It plays a vital role in promoting culture, democratic debate, social inclusion, civic engagement and education in Europe. Research shows that learning and the retention of information is more effective in print – especially for school students.

THINK PRINT IS NOT ENVIRONMENTALLY FRIENDLY?

Don't believe the myth that paper desktops forgo. European forests are growing by an area of 1.5 million football pitches every year. Paper is one of the few truly sustainable products – and one that doesn't need electricity to use after purchase. It's one of the most recycled materials in the world and Europe is the global paper recycling champion.

THINK THE JOBS OF THE FUTURE ARE ALL IN BIG TECH?

Employers in the printing industry are increasingly looking for people with creative, digital and technical skills to combine new technologies with manufacturing and design. In the EU, it is a single-scale industrial sector with more than 100,000 companies, 100,000 to 150,000 jobs, which are evolving and providing the jobs of the future.

Intergraf's introductory letter to Members of the European Parliament



ANALYSIS

European industrial strategy

To support MEPs' work on the new Industrial Strategy for the EU, we presented **Intergraf's Industrial Strategy for the Printing Industry** to MEPs working on this file. The four top priorities for our sector are:

- Support for **SMEs**
- Accelerate work on **skills and recruitment**
- Reinforce the role of print in Europe's **digital transformation**
- Support companies' transition to **sustainable and circular production**

Intergraf's Industrial Strategy for the Printing Industry:

www.intergraf.eu/policy/competitiveness/industrial-policy

“The fundamental question is: what is the default of a mailbox if there is no sticker to indicate a preference for door drops or not?”

Dick Naafs, President of KVG0 (Netherlands)



PART 1.4. CHALLENGING RESTRICTIONS ON ADVERTISING

Intergraf members are observing increasing pressure on unaddressed printed advertising (door drops). In some countries, authorities have proposed fiscal measures targeting door drops. In others, they are proposing a move from an 'opt-out' approach to an 'opt-in' approach. This means that citizens need to actively affix a "yes" sticker to their mailbox in order to receive door drops.



ANALYSIS

The implications of regulating door drops

The **European Unfair Commercial Practices Directive** is a key piece of legislation in the discussion around door drops. It regulates unfair business practices in the EU. In particular, it prohibits Member States from introducing general restrictions on commercial practices intended to protect consumers' economic interests, other than those listed in the legislation. The Directive bans unsolicited advertising by remote media if it is persistent and unwanted. However the Commission has already communicated in the past that **an opt-in scheme seems to go further than this ban**.

Bans or restrictions on **door drops** directly and hugely impact the European printing industry. Most commercial printing companies rely significantly on the production of local, unaddressed printed advertising. Having rapidly grown in importance for printing companies and national printing associations lately, actions on this topic have likewise increased at Intergraf.

The first serious attempt to regulate door drops took place in the city of Amsterdam, where an '**opt-in**' approach was introduced. This quickly spread to other cities and regions in the Netherlands,

although different approaches were taken across the country. We have since seen similar pressure on door drops spread to other countries.

Since the issue arose, Intergraf has **documented the different arguments** used for and against door drops and shared such information between our members. We also organised an expert panel on door drops at our Commercial Print conference in February.

As the topic has progressed in different countries, so has our advocacy at European level. In April 2020, we prepared a **position paper** on door drops, explaining why such regulation of the sector is disproportionate, as well as legally questionable. The paper highlights economic and social impacts, as well as focusing on the environment. The document will be used to further our advocacy efforts towards European institutions.

Addressed advertising is also subject to pressure. Intergraf has joined a joint industry initiative to secure a fair interpretation of the provisions of the **General Data Protection Regulation (GDPR)** impacting direct mail. In some countries, national regulators tend to restrict in practice the legitimate interest of the controller to collect data for direct marketing purposes - in particular to reach out to prospective customers. The industry platform is reaching out to the European Commission to advocate for a fair interpretation.

In addition, we have contributed to the 2020 **evaluation report of the GDPR**, calling for a more pragmatic implementation of the Regulation, particularly for SMEs. For instance, the duty to information and the record keeping of processing activities generate burdensome administrative work, in particular for printing companies which in general do not process high-risk data.

“For Intergraf and FTA Europe, our key aims are to ensure a fair conversation around all substrates and to secure that any new obligations are reasonable and workable”

Annie Scanlan, Membership & Information Officer at Intergraf and FTA Europe

PART 1.5. FUTURE REQUIREMENTS FOR PRINTED PACKAGING

Everyone is rightly concerned about pollution, in particular waste ending up in the oceans. This has led to particular scrutiny of the packaging sector. The European Commission's approach to stimulate industry action has so far primarily been to introduce extended producer responsibility schemes (EPR) and rules on packaging design. As part of the printed packaging chain, printers are implicated by these restrictions, particularly as some EU countries consider that printers "place" packaging on the EU Single Market.

Towards the end of the previous term of the European Commission and European Parliament (2014-2019), increasing public pressure meant that a more heavy-handed approach emerged. The quickly adopted **Single Use Plastics Directive** (2019), which bans certain products that are commonly found in the oceans, is indicative of what can be expected during the new term. Printers active in this sector must be hyper alert for new market restrictions. The ongoing European Commission **review of regulation applicable to food contact materials (FCM)** will also be important to monitor. Resulting regulation could assign packaging converters new obligations regarding chemical migration to food.

As the Commission has not yet produced legislative proposals on packaging during this current term, Intergraf's work has been focused on **monitoring** the EU institutions, and actively contributing in **cross-industry groups**. This ensures that the printing industry is well informed of activities across the value chain – essential for position development and sharing ideas. Intergraf has also signed **position papers** directed at the European Commission, which have been particularly effective during the COVID-19 crisis, during which packaging has been proven to be an essential product.

A new **Task Force on Food Contact Materials** within Intergraf is an important ongoing project. The broad aim is to gather knowledge from across Europe on the current reality for printers producing FCM and help the industry react to potential new regulation. This Task Force will build on the work which has taken place in the **Environment Working Group**.



NEXT STEPS

Key future developments

- Update to the essential requirements set out in the **Packaging and Packaging Waste Directive** (2005) to improve packaging design to minimise environmental impact – expected 2020 (legislative)
- **EPR schemes** nationally for packaging producers – by 2025 (legislative)
- Guidelines on **fee modulation in EPR schemes** (differing fees for producers dependent on materials and environmental impact) – expected 2020 (non-legislative)
- Results of **review of regulation applicable to food contact materials** – expected 2021/22 (possibly legislative)
- Guidelines on the application of the **Single Use Plastics Directive** – expected 2020 (non-legislative)



ANALYSIS

Regulatory approach at European level

The EU's regulatory approach forces producers to take responsibility for the entire **life cycle** of their product, beyond the point of purchase. The essence of the message which the European Commission is sending to producers? **Recyclability** by design; **reduce** the amount of packaging used to wrap a product; **improve** innovation and reusability.

“In addition to discussing the heavy environmental agenda of the new Commission with our Environment Working Group, Intergraf will produce technical guides in 2020 on the new industrial emissions limit values, the new conditions of use of chromium trioxide in gravure printing, and on the new EU Ecolabel criteria for printed products”

Laetitia Reunaud, Policy Adviser at Intergraf

PART 1.6. REINFORCING PRINT'S ROLE IN THE ECOLOGICAL TRANSITION

With the adoption of a New Green Deal in December 2019 by the European Commission, environment remains a core element of the work of Intergraf. In particular, circularity is a key principle that will be implemented in several areas. The Circular Economy Action Plan, presented in March 2020, promotes climate neutral and circular products.

Sustainable product policy is a key element of future EU legislation. Tools incentivising producers to consider the eco-design of their products include the strengthening of **extended producer responsibility schemes** and ecolabels. On the latter, the review of the **EU Ecolabel for printed products**, initiated in January 2018 and coming to an end in 2020, fits into that objective. Intergraf has extensively participated in the revision process for the Ecolabel. Alongside agreeing to provide more environmental ambition to the scheme, we secured that the criteria remain achievable for companies that are willing to make the efforts to be licensed.

The priorities of the new Commission also include deforestation. This supports Intergraf's continuous advocacy for the inclusion of printed products in the **EU Timber Regulation**.

To achieve climate neutrality by 2050, reducing industrial emissions will be part of the equation. By



ANALYSIS

European paper recycling key data

- **71.6%** paper recycling rate
- **83.6%** EU paper & board recycling rate
- **58.7 million tonnes** of paper recycled
- **82 million tonnes** of paper consumed
- **47%** increase in paper recycling since 1998

(source: EPRC, Monitoring Report 2018, 2019)



IN FOCUS

Carbon footprint of digital products

Electronic communication services have been identified as sector where the European Commission will expect more transparency on its **environmental impacts**. In particular, on the circularity of ICT equipment.

Recent studies show that the **direct footprint** of the production and use of ICT equipment has been increasing by 9% every year. And the share of ICT in global **greenhouse gases emissions** has increased by half since 2013, rising from 2.5% to 3.7% of global emissions (Source: The Shift Project, Lean ICT – Towards digital sobriety, 2019).

the end of 2020, the revised requirements for permit conditions of large printing plants, i.e. the **Best Available Techniques Conclusions** applicable to solvent users in heatset, flexo and gravure printing, will be available. Following the advocacy work we have carried out since 2017, we will publish a guidance document for heatset printing companies.

Among the chemicals used in the printing industry, **titanium trioxide (TiO₂)**, used as white pigments in inks, and **chromium trioxide (CrO₃)**, used in gravure printing, are both under EU scrutiny. Intergraf has been working on both files with fellow industry stakeholders. Thanks to industry advocacy, TiO₂ reclassification will only impact our industry to a limited extent.

“The findings of the E-READ research are striking. They show clearly what a critical role print plays in education alongside digital technologies.”

Alison Grace, Communications & Policy Officer at Intergraf

PART 1.7. CAMPAIGNING FOR PRINT

One of the biggest challenges for the printing industry, and for Intergraf, is to promote the image of print in a society which harbours misconceptions about our products. For such vital topics, there is great strength in unity. We work closely with other associations on various campaigns - NGOs and trade unions, as well as industry associations.



ANALYSIS

The image of print

Printed products in Europe are **circular** and **highly recycled**, as well as promoting **social inclusion, democracy** and **literacy**. Print is also **culturally significant** and proven to be highly complementary in many ways to digital forms of communication.

We in the sector understand **how important print is for much of modern life**. But because it is a long-established product in a new and exciting **digital world**, its many benefits are all-too-often overlooked. In fact, print is such an integral part of life that the public often does not even notice that it is all around them - in their wallets, homes, workplaces and communities.

TWO SIDES

Two Sides is a not-for-profit initiative of companies from the print supply chain. Their common goal is to promote the sustainability of our supply chain and dispel common environmental misconceptions by providing users with verifiable information on why print and paper is an attractive, practical and sustainable method of communication. Intergraf is on Two Sides' **Sustainability Committee**.

www.twosides.info

KEEP ME POSTED EU

Keep Me Posted EU is a citizens' rights campaign promoting the **right to choose** how to receive important communications - on paper or digitally. The campaign calls on European policymakers to ensure that no citizen is left behind in the digital transition - whether by choice or necessity. Alongside other campaign coordinators, Intergraf has promoted the Keep Me Posted EU campaign in meetings with various new MEPs following the 2019 European elections. The campaign is also working to grow its NGO supporter base.

www.keepepostedeu.org

THE FUTURE OF READING

Printed learning materials play a vital role in the **future of education** in Europe – even for so-called 'digital natives' – and there is a wide, and growing, body of independent academic research proving this. Intergraf is promoting these findings across all of its work.

One such research initiative is **COST Action E-READ**. This large meta-study of 54 studies with more than 170,000 participants found that reading comprehension is "stronger when reading on paper than on screens", and that "such screen inferiority effects have increased, rather than decreased, over time, regardless of age group and of prior experience with digital environments".

www.ereadcost.eu/stavanger-declaration



NEXT STEPS

Promoting reading in print

Intergraf's work to promote the results of the **E-READ initiative** is in its infancy. We have already brought up the research with multiple EU policymakers and will continue to do so in all relevant fora.

“The children of today are the students and workers of tomorrow; the workers of today are a tremendous and precious source of knowledge: we have to work for the present as well as for the future, over 1, 5 or 10 generations, because that is how our image will evolve in society’s mind.”

Bastian Combeau, Winner of the 2020 Intergraf Young Talent Award



PART 1.8. PRINTERS OF THE FUTURE

Intergraf is committed to the future of the graphical sector. This entails a focus on the future workforce. In 2020, we began the 'Print Your Future' project, which will support and enhance recruitment efforts across Europe. The Intergraf Young Talent Award also feeds into this project. Applicants to this year's award all submitted papers about improving the image of our sector - an important topic to address in any recruitment activities.

PRINT YOUR FUTURE PROJECT

Intergraf is the co-coordinator of the EU-funded project '**Print Your Future**', alongside our Social Partner, UNI Europa Graphical.

The 18-month project (plus a 6-month extension due to COVID-19) is about attracting a new skilled workforce for quality jobs in the European graphic industry. It will address **skills and recruitment issues** in the European printing industry, proposing and testing possible solutions based on best practices.

The project focuses on Estonia, Germany, the Netherlands and Portugal, but it will develop pilot initiatives and a toolbox of materials which will also be applicable in other countries. Because of this, the project has a **high relevance for Europe** as a whole.

We have set four specific objectives to achieve in our project:

- diagnosis;
- identification of best practices;
- capacity building and implementation;
- communication campaign.

Print Your Future will conclude with in a final conference at the end of 2021. Outcomes of the project will include a website, video interviews of young people in the sector, collected best practices about recruitment, and Young Workers Day events in each of the focus countries.

www.printyourfuture.eu



IN FOCUS

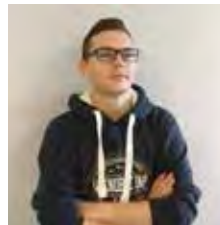
European Social Dialogue

Attractiveness of the sector and the image of print are both high on the agenda of the graphical sector's **European Social Dialogue Committee**, making up an important part of our 2019-24 Work Programme.

For more information about Intergraf's work as a European Social Partner please visit:

www.intergraf.eu/policy/social-affairs/social-dialogue

YOUNG TALENT AWARD



Bastien Combeau

Intergraf celebrates one talented young person in print media annually for their outstanding contribution to the future of the sector. This year's **Young Talent Award** winner was Bastien Combeau, engineering student at Grenoble INP - Pagora, France.

Each entrant addressed the issue of **recruitment** by submitting their ideas on **how to attract young people** to the sector. As well as recognising excellence, our Young Talent Award aims to amplify the voices of young people in discussions about the future of the printing industry. As the sector's workforce of tomorrow, young people's views are invaluable in shaping the future of print.

www.intergraf.eu/image/young-talent-award

“If you’re not re-inventing your business model, I suspect you won’t survive”

Sean Smyth, Smithers, speaking at Intergraf’s Commercial Print conference

A photograph of a man with grey hair, wearing a dark suit jacket over a light blue shirt, speaking at a wooden podium. He is wearing a small lapel microphone. In the foreground, the backs of two audience members' heads are visible, looking towards the speaker. To the right, a red backdrop with the 'INTERGRAF' logo is partially visible. The background features large windows with dark curtains.

PART 1.9. THE ‘UBERISATION’ OF PRINTING

Companies should re-invent their business models to better meet customers' changing needs and demands. This was one of the key messages communicated at our Commercial Print conference. In effect, this means owning the customer relation, rather than the manufacturing - or in other words: the 'Uberisation' of print - a model that is very applicable to the print sector.



IN FOCUS

Intergraf's market reports

We published the **Intergraf Commercial Print and Catalogues - Market Report** in February 2020. As well as presenting market data (compiled by our partner, Smithers), this report gives a strategic analysis of the sector based on expert presentations given at our **Commercial Print conference**.

Discover all of Intergraf's market reports on our website:
www.intergraf.eu/communications/market-reports

Regular collaboration with **Smithers**, Intergraf's research partner, gives us exclusive insights into the European printing industry - both as a whole and concerning specific sub-sectors. Our many **market reports** presenting such insights are available **FOR FREE** for members of Intergraf. Recent reports include:

- Annual Economic Report (2020)
- Commercial Print and Catalogues - Market Report (2020)
- Printed Packaging Trends - Market Report (2019)

The sharing of knowledge and information is a vital part of our industry's development. One of the

foremost ways Intergraf facilitates such dialogue is through organising **international events**. Speakers at our events present a broad range of views from both inside and outside of our sector. Our events are focused on Europe, but participants attend from all over the world.

Conferences in our **Shaping the Future of Print** event series are always accompanied by an exclusive market report prepared by our market research partner, Smithers. These reports are offered to participants as part of their event package. This event series provides insights into **specific sub-sectors** of the European printing industry. In 2020 the focus was commercial print, in the past it has included packaging, magazines, direct mail and books.



NEXT STEPS

Upcoming Intergraf events

Our upcoming **Shaping the Future of Print** event in February 2021 will focus on the book market. As usual, this event will be accompanied by an exclusive market report from Smithers.

Our annual **Print Matters for the Future** event, which focuses more generally on the sector as a whole, will be organised in June 2021.

For more information about our events you can visit our website:
www.intergraf.eu





PART 2. OUR WORK

2.1. POLICY

More legislation than ever before is decided upon at European level. This affects the day-to-day running of a printing company. It is vital that the European graphic industry is **strongly represented** at the European Union. Intergraf ensures that concerns of the graphic industry are heard when legislation is discussed. We work on a wide variety of **EU policy** matters which impact the European graphic industry.

COMPETITIVENESS

- Taxation (*VAT on printed products vs. digital publications; VAT reform*)
- Data protection
- Production costs (*evolution of paper prices; consumable prices; energy costs; postal rates*)
- Limitation to advertising (*through taxation or legislation*)
- Digitalisation (*e-government; e-invoicing; consumer policy*)
- Image of print
- Copyright issues (*reprography requirements impacting digital printing*)
- Postal infrastructure and services
- Online selling (*e-commerce; payment services*)
- Cross-border selling (*VAT; geo-blocking*)
- Industrial policy
- Labelling requirements
- Trade (*paper duties*)
- Sectoral statistical classification
- Money laundering
- Cash control
- Packaging security features
- State aid and unfair competition
- COVID-19

ENVIRONMENT

- Industrial emissions (*Best Available Techniques Reference Documents; BREFS*)
- Environmental labels (*EU Ecolabel; national schemes*)
- Ecodesign/recyclability/deinkability
- Timber/forest management (*Timber Regulation; chain of custody certification - FSC, PEFC*)
- Carbon/environmental footprint of printed products
- Carbon/environmental impact of digital
- Food contact material (*mineral oil*)
- Waste policy
- Paper recycling
- Single use plastics
- Chemical policy (*titanium dioxide; chromium trioxide*)
- Energy efficiency
- Corporate social responsibility

SOCIAL AFFAIRS

- Social Dialogue
- Employment (*trends; new business models; labour law; wage-setting*)
- Skills and qualifications (*education and training systems; vocational education and training (VET); qualification frameworks; upskilling; lifelong learning; recruitment; demographic change; digitalisation; image of print*)
- Moving and working in Europe (*free movement of workers; social security coordination*)
- European Pillar of Social Rights (*equal opportunities; health and safety; gender equality; work-life balance; non-discrimination; fair working conditions; social protection and inclusion*)

2.2. ECONOMIC INFORMATION

Economic data is the key to revealing the condition of and outlook for our sector. Intergraf provides **economic information** to our members in a variety of different ways.

Since the sharp increases in graphic paper prices in 2017-2018, we have provided monthly updates in the one-pager **Economic News**. Three times per year, a more extended **Economic Newsletter** provides short-term data on turnover, paper consumption and prices. This regular information is **available for free** to all members of Intergraf and their member companies.

Once a year, we publish our **Annual Economic Report** which provides extensive economic information on the sector. It provides an overview of available data on the European graphic industry (e.g. turnover, number of employees and companies, production values, and trade), as well as highlights about the economic development of sectors which are relevant to the printing industry (ink, paper, publishing, books, press, energy and postal markets). It also shows historical developments and comparisons between countries. The report features a contribution from our partner **Smithers**, the **European print market review**, which includes a 4-year forecast. Information on current trends in selected European countries is provided by Intergraf's member federations.



Source: Intergraf Economic News, March and May 2020 (extract)



Source: Intergraf Annual Economic Report 2019 (extract)

2.3. EVENTS

Intergraf organises a variety of annual events - both internal and external. For our members, there is the **General Assembly** and the **Directors' Conference**. We also organise two events every year that are attended by our members alongside external participants: **Print Matters for the Future** and **Shaping the Future of Print**. These conferences are supplemented by smaller events throughout the year, like the **Social Dialogue Plenary**.

- General Assembly, London 2019
- Print Matters for the Future, London 2019
- Directors' Conference, Bordeaux 2020
- Intergraf 90th Anniversary, Brussels 2020
- Shaping the Future of Print: Commercial Print, Brussels 2020



Intergraf Directors' Conference, Bordeaux, September 2019



Intergraf Commercial Print conference, Brussels, February 2020



Intergraf Print Matters for the Future conference, London, June 2019

PRINT MATTERS
FOR THE FUTURE
by INTERGRAF

INTERGRAF 90TH ANNIVERSARY



2.4. COMMUNICATIONS

By now, Intergraf's communications will again be familiar, following our extensive **re-branding** exercise in 2018-19. Our **strategic communications** reach a wide audience - within Intergraf's membership and beyond. We inform you about our work through a variety of channels, including:

Public

- Annual Activity Report
- Monthly Newsflash
- Website
- Social Media (LinkedIn)
- Press Releases
- Post-event video: Commercial Print conference

Members only

- Annual Economic Report
- Economic Newsletter (x3 per year)
- Monthly Economic News
- Members' Area on website
- Bi-weekly News in Brief
- Factsheets
- European Commercial Print & Catalogues - Market Report
- European Printed Packaging Trends - Market Report

Sign up for our monthly Newsflash at:
www.intergraf.eu



FACTSHEET



Contact a member of the team to access our **Factsheets**, which are **exclusively available** for Intergraf members.

- Social Affairs (July 2019)
- Packaging: Food Contact (August 2019)
- Door Drops (September 2019)
- Chromium Trioxide (November 2019)
- GDPR (November 2019)
- Titanium Dioxide (November)
- Door Drops (January 2020)
- Industrial Emissions (January 2020)
- Minimum Wage (January 2020)
- The Future of Reading (March 2020)



Follow us on LinkedIn: www.linkedin.com/company/intergraf-the-european-federation-for-print-and-digital-communication

2.5. PROJECTS

- Print Your Future project (Co-Coordinator)

2.6. AWARDS

- Intergraf Young Talent Award

Intergraf's **Young Talent Award** celebrates excellence in print media from young people in the sector, with the winner awarded a cash prize. As well as recognising **excellence in the field**, the Young Talent Award amplifies the voices of young people in discussions about the future of the European printing industry. As the sector's workforce of tomorrow, young people's views are invaluable in shaping the future of print.

The theme of the 2020 Young Talent Award directly addressed the problem of **recruitment**, a pressing issue in many printing companies, by asking entrants to submit their ideas on how to attract young people to the printing industry. We received a large number of notable entries from all over Europe which addressed this topic in many different and innovative ways – so much so that the judging committee exceptionally decided to award more than one entry, offering second and third prizes, in addition to first.

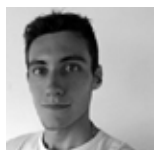
1st



2nd



3rd



Bastien Combeau, engineering student at Grenoble INP – Pagora, France, was awarded first prize, with his entry: "How to attract young people to the printing industry". The judges gave special recognition to two runners up, with second place awarded to the entry from **Sedef Kasim and Kevin Gnabry** (Hochschule der Medien – Stuttgart, DE), and third place to **Cédric Dumont** (Grenoble INP – Pagora, FR).

2.7. CAMPAIGNS

- Two Sides (on Steering Committee)
- Keep Me Posted EU (on Steering Committee)
- The Future of Reading (unofficial campaign)

*“We were very impressed with all of the entrants to our **Young Talent Award** this year. Attracting young people to the printing industry is consistently highlighted as one of the main challenges companies across Europe need to overcome. Feedback from young people on this topic is vital.*

Beatrice Klose, Secretary General of Intergraf

2.8. EUROPEAN NETWORK

One of Intergraf's key strengths is our **relationships at European level**. In order to effectively influence EU policy, such contacts are critical - both within the European institutions and outside of them.

The printing industry does not exist in isolation. We are a user of products and services from, as well as a supplier to, many other sectors, as well as operating within the same wider social and economic system. Because of this, the policy areas Intergraf covers are wide-ranging, as well as their content being vast and often complex. EU legislation does not only affect one sector.

Pooling knowledge and resources between different associations in **European platforms and networks** allows us to be more effective advocates for the printing industry. As well as our regular contacts with individual associations, we are a member of, or interact regularly with, the following platforms at European level:

- Print Media Group (PMG)
- Industry4Europe Coalition
- European Paper Recycling Council (EPRC)
- Packaging Chain Forum
- Packaging Ink Joint Industry Task Force (PIJITF)
- XSG (cross sector group) on food contact materials
- European Solvents Downstream Users Coordination Group (ESVOC)
- European Platform for Chemicals-Using Manufacturing Industries (CheMI)
- BusinessEurope (e.g. European Employers Network)
- European Graphic/Media Industry Network (EGIN)

2.9. PARTNERSHIPS

FTA EUROPE

Since 2015, Intergraf has shared its Secretariat in Brussels with its sister association **FTA Europe**. FTA Europe represents and promotes the **flexography printing** sector.



FTA Europe representatives, Brussels, June 2019

A key activity of FTA Europe is the **Diamond Awards**, which recognises exceptional flexo printers from across Europe. The next edition takes place on 22 April 2021, alongside drupa in Düsseldorf.

FTA Europe has also produced an **e-book on best practices for flexo machine operators**, which is available on Apple Books in English and Italian, and soon in Dutch, French, Spanish, and Portuguese. FTA Europe, in particular its Technical Committee of experts, will work closely with Intergraf in the **Task Force on Food Contact Materials**, due to the shared interest of the packaging sector.

www.fta-europe.eu

SMITHERS

Intergraf has collaborated with **Smithers** on a multitude of activities since our partnership began in 2013. Smithers is the **global authority** on the packaging, paper and printing industry supply chains. We work primarily with the division **Smithers Information**, which delivers in-depth market data, as well as technical and business information.

Every year, Smithers contributes a review of the European print market to the **Intergraf Annual Economic Report**, supplementing the information provided by us and our members. We also work together on the event series: **Shaping the Future of Print** (focusing in 2020 on the commercial print market), for which Smithers provides a detailed market report about different sub-sectors. So far, this has included commercial print, packaging, magazines, direct mail and books. A representative from Smithers presents their data at every event.

www.smithers.com

UNI EUROPA GRAPHICAL

As the **European Social Partner** representing employers in the graphical sector, Intergraf works regularly with our counterpart trade union, **UNI Europa Graphical**. Since 2013, we have engaged in sectoral **Social Dialogue**, supported by the European Commission. In 2019, we published a new Work Programme, committing to work on sectoral trends, digitisation, demographics, skills, new business models, state aid and unfair competition, and image and environment.

2020 also saw the launch of our joint project (funded under Social Dialogue): **Print Your Future**. This project will provide solutions to image and recruitment issues affecting the graphical sector.

www.uni-europa.org

WORLD PRINT AND COMMUNICATION FORUM

Intergraf is a founding member of the **WPCF** (World Print & Communication Forum), the leading collaborative platform for the world's major national and transnational printing associations. We also administer the platform's **Secretariat**.

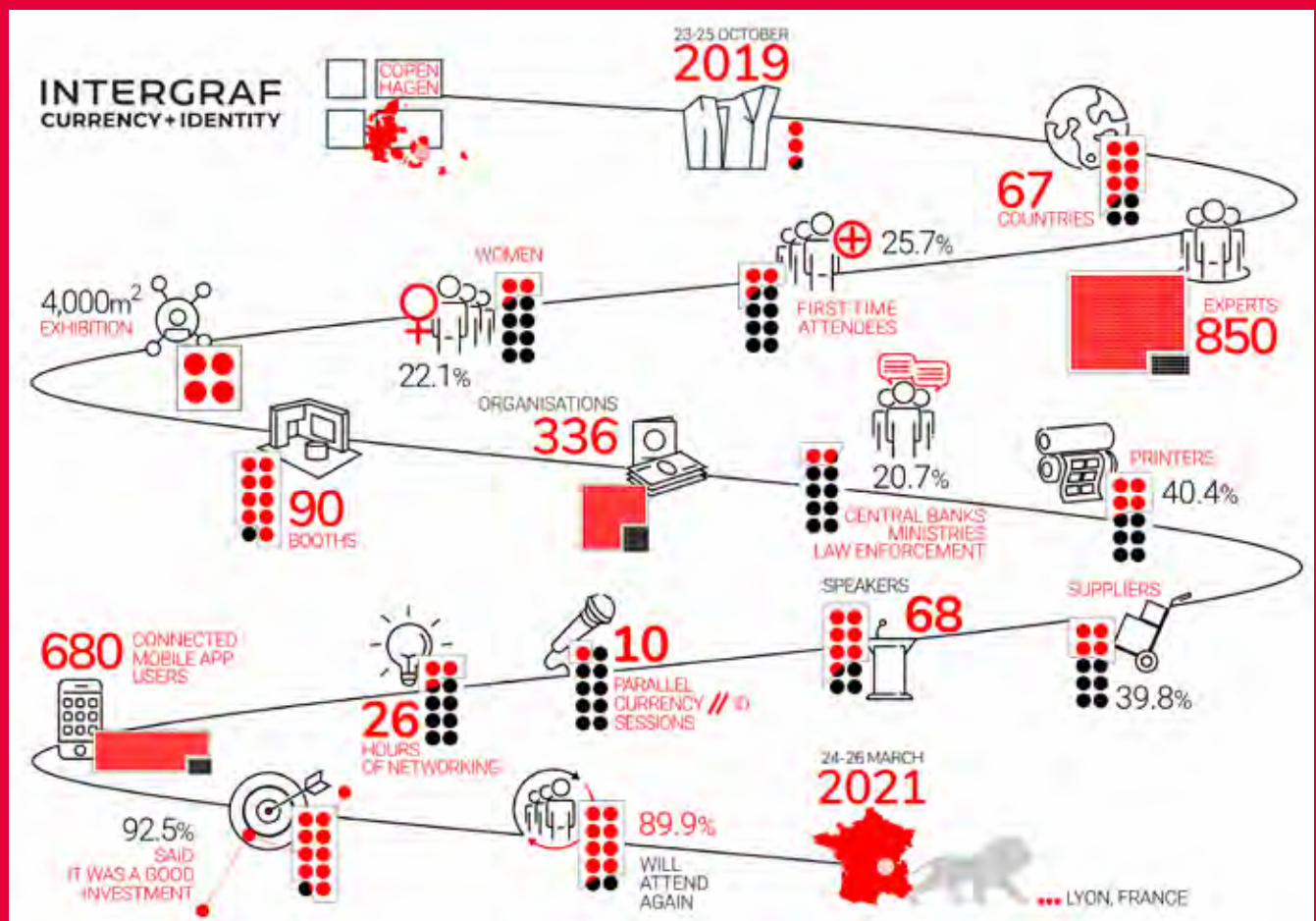
In January 2020, Intergraf attended the **World Print Forum** in Mumbai, India, hosted by our fellow WPCF member, the All India Federation of Master Printers. WPCF members also used this occasion for a board meeting. This year was noteworthy because the platform welcomed two new members: Nepal and South Africa. Following this event, the **WPCF 2020 Economic**



Report was published, presenting key data about the global economy, print markets and focused country reports about WPCF members.

Every two years, the WPCF supports Intergraf's **Print Matters for the Future** event, adding a global perspective to our European event. A record 76 international delegates from 26 countries met in 2019 in London, UK. The next Print Matters for the Future event that will also be supported by the WPCF is due to take place in 2021.

www.worldprintforum.org



2.10. INTERGRAF CURRENCY+IDENTITY EVENT

Since 1976, Intergraf has offered security printers, suppliers and end customers all over the world an independent platform to discuss what is next in the world of currency and identity documents.

Its latest conference and exhibition, organised every 18 months in different cities across Europe, took place in Denmark in October 2019. For three days, 850 delegates from 67 countries, representing 336 organisations, converged in Copenhagen to learn from 68 speakers and engage in constructive dialogue with 90 exhibitors.



Intergraf Currency+Identity, Copenhagen, October 2019

Intergraf is already busy preparing the next event, scheduled in Lyon, France in March 2021: **Intergraf Currency+Identity**. The name will be new and the scope broader to reflect rapid technological change and include industry-specific digital solution providers, but the goal will remain the same: to connect a global community united around making our currencies and identity documents more secure, more convenient, and more sustainable.

Intergraf members enjoy **discounted registration fees** for Intergraf Currency+Identity.

www.intergrafconference.com

2.11. INTERGRAF CERTIFICATION FOR SECURITY PRINTERS



ISO 14298



CWA 15374

The year 2019-2020 has been very successful for Intergraf's certifications. We currently have over 150 certifications in 55 countries worldwide and 20 applications that are in the process of being assessed.

Most of these certifications are of security printers and hologram manufacturers with **ISO 14298**. The second certification system is for suppliers to the security printing industry in order to secure the entire supply chain (**CWA 15374**). Both certifications are production site-related and ensure state-of-the-art security management of the facility.

In addition to the official ISO 14298 standard Intergraf has developed the detailed **Intergraf Certification Requirements (ICR)**, which help companies to achieve a high level of security measures. Contrary to the public standard ISO 14298, the ICR is proprietary to Intergraf and reviewed annually to ensure up-to-date security requirements.

Our two independent certification bodies, VPGI (NL) and SQS (CH), have qualified and trained auditors that carry out the audits worldwide.

As part of the **Intergraf Currency+Identity** event, a workshop with specific ICR topics is regularly offered to our certified companies. When the topic of business continuity management was discussed last October, nobody knew how much everyone would have to deal with this issue in the near future!

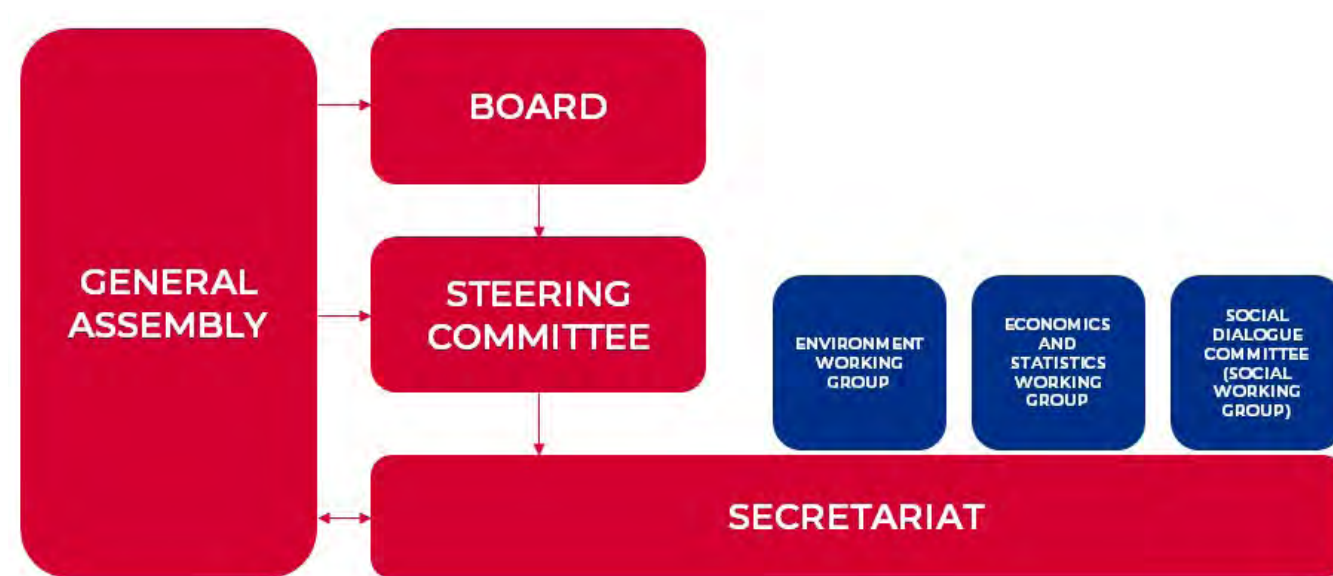
www.intergraf.eu/certification





PART 3. GOVERNANCE

3.1. WORKING STRUCTURE



The broad strategic direction of Intergraf is decided by the **Board**, a group of nine company representatives appointed by Intergraf's member associations. Countries currently represented are Denmark, Germany, Italy, Latvia, the Netherlands and Portugal. FTA Europe also has a seat on the Board.

Strategic decisions of the Board are carried out by the **Steering Committee**, a body comprising of Directors and other high-level representatives from national printing associations. Countries currently represented are Denmark, Germany, Hungary, Italy and Portugal.

The Intergraf **Secretariat** is made up of three teams: European Affairs, Security Printing and Accounting & Administration. All three teams are managed by the Secretary General. The Secretariat carries out the day-to-day work of the association.

Intergraf chairs two active **Working Groups**: the Economics and Statistics Working Group and the Environment Working Group. These groups contain experts from national associations. They meet regularly to discuss all relevant EU policy issues. There is also a third, currently inactive, Social Working Group. Social affairs issues are discussed instead amongst members of the Social Dialogue Committee.

Intergraf's annual **General Assembly** is the association's main decision-making body, where members approve the work and income/expenditure of Intergraf. The General Assembly also grants discharge to the Board and Steering Committee to carry out their work during the upcoming year.

3.2. SECRETARIAT

EUROPEAN AFFAIRS



Beatrice Klose
Secretary General



Laetitia Reynaud
Policy Adviser



Alison Grace
Communications &
Policy Officer



Annie Scanlan
Membership &
Information Officer
(Intergraf and FTA Europe)

ACCOUNTING, HR AND ADMINISTRATION

Reka Sipos, Accounting, HR & Administration
Officer

SECURITY PRINTING

Intergraf's **Security Printing Team** organises the Intergraf Currency+Identity Event and manages Intergraf's Certifications.

- **Doris Schulz-Pätzold**, Customer Relations & Certification Manager
- **Simona Barbulescu**, Event Coordinator
- **Corinne Durand**, Web & Digital Communications Officer
- **Cristina Muntenu**, Exhibition Coordinator
- **Manfred Goretski**, Editor of Infosecura Magazine

TEMPORARY STAFF

Thank you to **Marsida Bandilli**, Temporary Communications Assistant (maternity cover) in the European Affairs Team in 2019.

Thank you to **Sophie Plattard**, Temporary Conference & Exhibition Assistant in the Security Printing Team in 2019.

3.3. MEMBERS

Thank you to all of our Members for your expertise and dedication over the past year! Intergraf's mission is to promote and protect the European printing industry at EU level. We could not do this without you. Your voices help to bring us (and issues which are the most important to printers) visibility and influence at the highest levels.

Would you like to become a member, or associate member, of Intergraf? Find out more:

www.intergraf.eu/members/how-to-join



united in graphics



PRINTING INDUSTRY UNION
OF BULGARIA

GRAKOM



Gt

graafinen teollisuus ry



union nationale des industries de l'impression et de la communication

bvdm.

Bundesverband
Druck und Medien e.V.







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