

A large graphic for 'PRINT 21'. The word 'PRINT' is in white on a blue background with a dotted pattern. The number '21' is in white on a yellow-to-orange gradient background. Above the text is a blue square containing a white wireframe globe. The background features a faint, large '21' and a blue circular graphic.

The Printing Industries **Action Agenda**

PRINT 21



COMPETITIVE AUSTRALIA



Minister for Industry Science and Resources



I wish to congratulate the printing industries on the development of the Printing Industries Action Agenda.

Printing plays a vital role in all sectors of the Australian economy and society. The printing industries are set to play a substantial role in Australia's new economy through the provision of important enabling services to other industries.

The Printing Industries Action Agenda will generate a new level of strategic thinking and in these times of very rapid technological and economic change, it is important that the industry continues to adapt and grow.

The partnership approach between industry and Government fostered through the Action Agenda provides a solid basis for implementing the recommendations and delivering positive outcomes for the industry. The industry is to be commended for its significant contribution to date and its ongoing commitment of time and resources to the Implementation Plan.

I encourage all involved in the Action Agenda process to maintain the impetus for greater competitiveness which it has begun through this Action Agenda.

NICK MINCHIN

Minister for Industry, Science and Resources

March 2001

Action Agenda Chairman



Time magazine, in listing the 100 most influential events of the second millennium, chose the printing of the Gutenberg Bible as the most significant, because in creating the beginning of print as we know it today, this event changed for all time our access to knowledge and our ability to record and share information.

The printing industries today produce the most visible, most common and most effective means of communication seen in our daily lives. It is Australia's fourth largest manufacturing industry employer and a major contributor to the Australian economy.

However, Australia's printing industries are at the cross roads. The pace of technological change in the industry is nothing short of phenomenal. Long gone are the images of plastic sleeved printers stooped over typeset. The industries in Australia have moved from the traditional "ink on paper" industry to embrace an ever-increasing range of technologies and fields of expertise.

And yet as printing industries we have not always had a clear vision for our future. We don't always recognise the sophistication and size of our industry and the major role we play in people's lives and in the economy.

The **PRINT21** Action Agenda is the result of our industry working with the Commonwealth Government and, importantly, working together to develop a blueprint for our future. For the first time in our industries' history we have a plan for our future combined with the materials and tools that will assist individual companies to develop their own innovation-based strategies. It is a major achievement for our industries.

I commend the industry and the Commonwealth Government for the initiatives developed and recommend **PRINT21** to all printing businesses.

TREVOR HONE

Chairman of PRINT21

March 2001

Funding Parties



Printing Industries Association of Australia (Printing Industries) is the national association representing companies in the Australian printing, graphic arts, paper, packaging and paper products industry.



GAMA represents the interests of member companies providing goods and services to the graphic arts and related industries.



The National Paper Council of Australia represents members of the paper production and marketing industry.



Australian Paper, the marketing and manufacturing division of PaperlinX, produces some of Australasia's leading brands of paper product.



The Department of Industry Science of Resources, Manufacturing, Engineering and Construction Division

Profile - Australian printing heading into a new millenium

Printing industries are the third largest manufacturing industry employer worldwide, and the fourth largest in Australia.

The industries undertake a wide range of activities including: the manufacture of paper stationery, commercial and job printing, the provision of services to industry, publishing and printing of newspapers, books magazines and periodicals, and the manufacture and publishing of audio, video and data media.

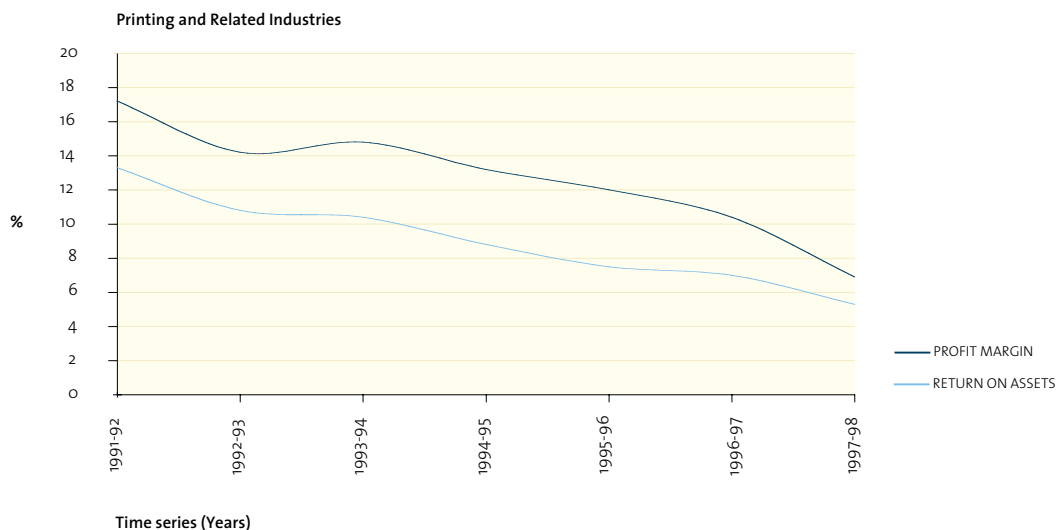
In Australia, the printing and related industries (excluding pulp and paper manufacturing) comprise of some 6000 firms.

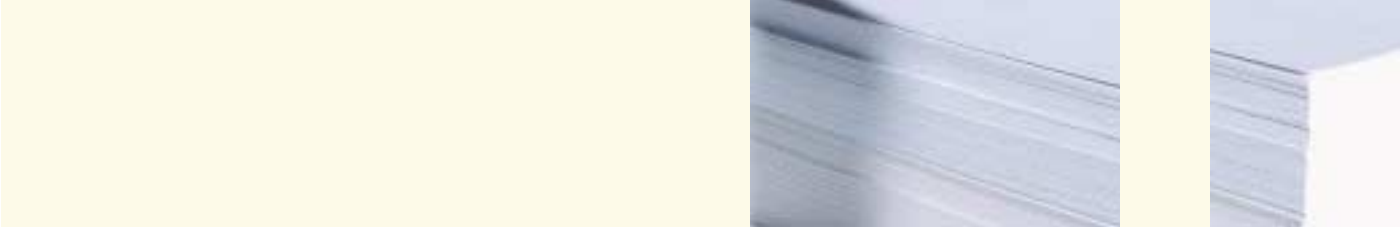
Of these, 58 are large firms (greater than 200 employees) employing 39,000 people. The overwhelming majority of firms are small and medium enterprises employing some 62,000 people.

The industry plays an important role in regional Australia. Approximately 35% of Graphic Arts establishments are located outside capital cities. There is also a significant presence of small printers in the bush (eg: local town papers).

The long term economic performance of printing industries is a cause for concern. Diagram 1 illustrates the industries' on-going slow slide in profitability and return on assets. Also see Action Agenda Background Paper No.1 for more detailed analysis of economic performance.

DIAGRAM 1





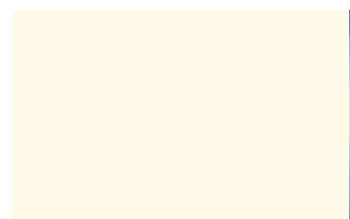
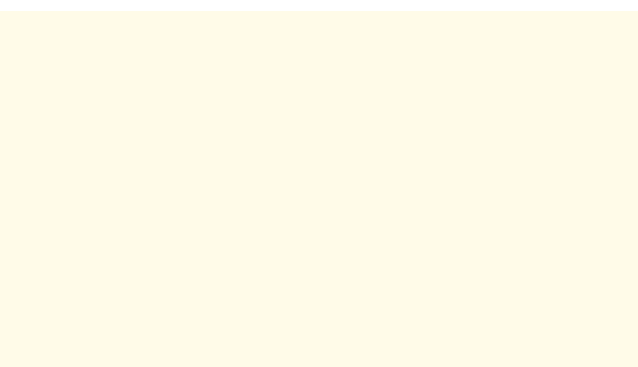
As many have commented during the Action Agenda process.....

‘...its harder to do business...’

The data confirms this situation. Prospects for Australian printing industries will not improve without a major re-think about the ways business is being done.

The future does hold lucrative new business opportunities for Australian Printing (see Action Agenda Background Paper No.2). It's no surprise that new high value opportunities will arise more and more in what is termed the market space, e-commerce and the internet.

Traditional market place, ink-on-paper business opportunities will still be available, of course. The challenge for printers lies in developing innovative business strategies that cleverly exploit complementarity between market place and market space business.



Findings

PRINT21 - a package to help Australian printing

PRINT21 is a partnership between the Commonwealth Government and the Australian Printing Industries. The **PRINT21** package of initiatives consists of:

- The Printing Industries' Action Agenda;
- The Printing Industry Competitiveness Scheme;
- The Book Production EPICS Grants including Business Diagnostic Tools and a Client Manager Service;
- A component of the Value Chain Management Program; and
- Other government sponsored support programs.

Printing Industries Action Agenda - Signposting the Future

The purpose of the **PRINT21** Action Agenda is to provide a strategic overview of the Australian printing industries; where it is today, future growth opportunities and snapshots of possible growth pathways into the 21st Century (see Background Papers 1, 2 and 3 respectively for details).

For readers who wish to learn more about the future of various print technologies and trends in overseas print markets, an excellent reference is the recently released U.S. Printing Industry Association report entitled Vision 21 - The Printing Industry Redefined for the 21st Century.





Action Agenda Findings

The Printing Industries Action Agenda was announced by the Minister for Industry, Science and Resources, Senator the Hon Nick Minchin in March 1999, at the printing industry summit, 'Action 2000'.

The key findings of the Action Agenda come down to this:

- Australian printing industries are experiencing a slow slide in profitability and a decline in return on assets.
 - The challenge in the new millennium is to innovate, revitalise profitability and sustain industry-wide long term growth.
 - Reliance on the way business has been done in the industry up to now is no guarantee of survival let alone sustainable growth.
 - New approaches are needed for new business development and the customer is vital in this process.
 - Customers are saying they want to see more total business solution offerings from Australian printers.
- The Action Agenda provides twelve recommendations pin-pointing projects and initiatives that will position Australian printing industries to achieve long-term sustainable growth.

The recommendations underscore that profitable business development will depend on strategies that creatively integrate:

- Clever business strategy based on sound knowledge and in-depth understanding of existing and potential customer needs;
- Appropriate use of print technology; and most importantly,
- Patient investment by firms in the professional development of people.



Australian Printing Navigating the 21st Century

The 21st century — navigating complexity and flexibility

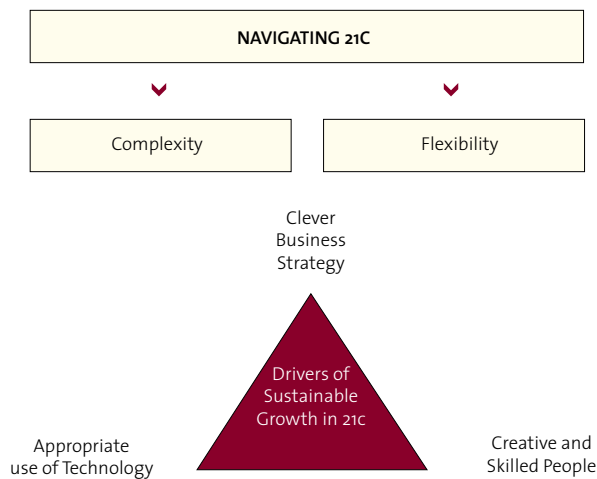
Australia's printing industries face a number of challenges as the new millennium dawns.

Rapid technological change will continue for the foreseeable future. The processes of industrial convergence will accelerate creating both opportunities and threats. Printing, information and telecommunications industries will play key roles in the new and emerging knowledge-based economy.

The future for Australian printing industries will be exciting, complex and uncertain. To borrow a nautical analogy, in this situation...

...the industry must ready itself to navigate through uncharted waters...

PRINT21 - Australian printing navigating the 21st century - aims to capture this idea of 'navigating' through the uncertainties that the new millennium brings.





The challenge in reaching the goal of sustainable long-term growth in the industries is to manage the complexities that will arise and to manage with flexibility.

PRINT21 recommends that to effectively navigate these uncertain times Australian printers must commit to innovative business planning, the appropriate use of technology and investment in people development.

Business planning would be much easier if we were able to predict with some certainty the particular direction the future were to take. We obviously can not. There are, however, methods that can be used as part of the planning process which can at least help crystallise a range of possible or plausible futures (scenarios).

Scenario planning has been applied with some considerable success in the corporate world for a number of years now. It is based on the simple idea of writing stories of plausible alternative futures based on what is known now and how far the imagination can be stretched reliably to envision futures.

Scenario planning is gaining increasing recognition in Australia. The Australian Chamber of Commerce and Industry held its 1999 National Policy Conference under the title, Scenarios for Australian Business to the year 2015.

In his opening address to the conference Senator the Hon Nick Minchin, Minister for Industry, Science and Resources made a number of points in support of scenario planning for Australian business. Two are apt to **PRINT21**. The Minister noted that the future is something we create and that we need to be flexible and responsive in business planning.

Industry representatives who participated in the development phase of the Action Agenda agree that the application of techniques such as scenario planning will be useful, if not essential, in the task of developing 21st century business strategies for the printing industries.

Readers are referred to Action Agenda Background Paper No.3 which provides examples of scenario planning applied to the printing industries

"Scenarios deal with two worlds: The world of facts and the world of perceptions...Their purpose is to gather and transform information of potential strategic significance into fresh perceptions which then lead to strategic insights that were previously beyond the mind's reach"

Pierre Wack, 'Scenarios: The Gentle Art of Reperceiving', 1984

Implementing the Action Agenda

Industry and Government working together

PRINT21 marks a significant milestone in the history of Australia's printing industries' relationship with the Government. Processes have now been established for on-going discussions on issues relating to the development and sustainable growth of the industries in the new millennium.

Implementation of the Printing Industries Action Agenda will be initiated in 2001 and continue until at least the beginning of 2004.

Much has been learnt from the development phase of this Action Agenda. This knowledge will be essential to ensure that the initiatives put in place over the next four years are beneficial to the industries' growth and profitability.

The Action Agenda working group process has also demonstrated the value of input and participation from members and associates of the industry. All are to be congratulated for their generous input of time and resources into the process over the last two years.

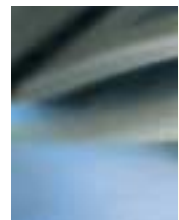
The over-riding challenge to be addressed in the forthcoming implementation phase is not only how to improve production efficiencies, it is also about broad sweeping change in all sectors of the industries towards a customer service culture.

Success in shaping a brighter future for the industries will again depend on the willingness of members and associates of the industries to participate in the implementation process.

Action Agenda Implementation 2001 to 2004

The twelve recommendations of the Action Agenda focus on developing practical solutions and ensuring results are achieved. The recommendations also detail the tasks that industry and government must undertake to achieve targeted outcomes, and assigns responsibility for these tasks.

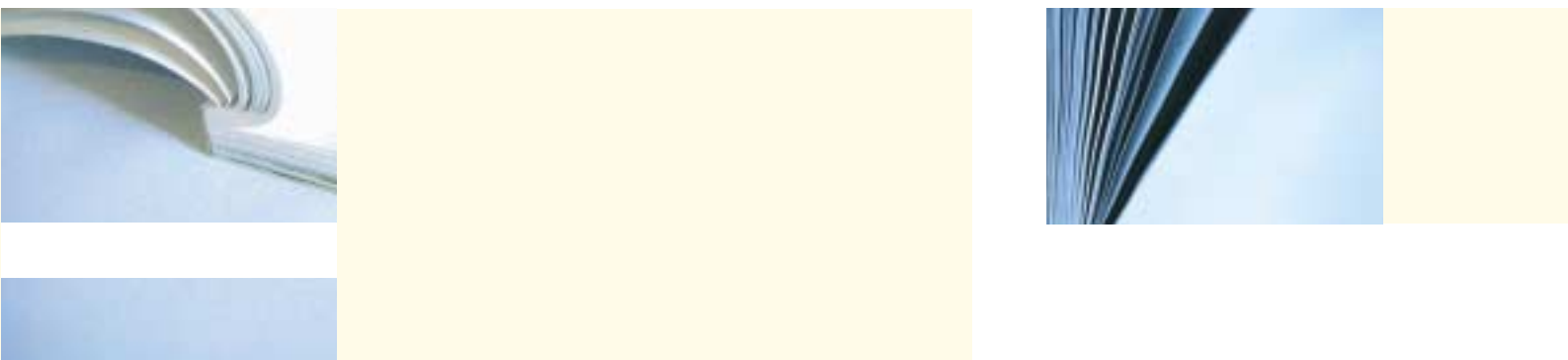
In the accompanying Implementation Program, each of the recommendations have been identified against the key drivers for sustainable growth mentioned previously. The recommendations effectively commit the industry and government to actions aimed at promoting long term culture change.





The Action Agenda and its recommendations have been endorsed by the industry bodies whose representatives participated in the development process. The Action Agenda also has whole-of-government endorsement. Commonwealth Government Departments endorsing the Action Agenda have committed to assisting the industry to address the recommendations.

Notably, it is recommended that an Implementation Group be established to coordinate and integrate the range of actions and recommendations arising from the Action Agenda. It is envisaged that the Implementation Group will also determine future actions in the medium to long-term, including re-visiting the processes of the Action Agenda to profile the industry, identify opportunities and develop pathways to industry growth.

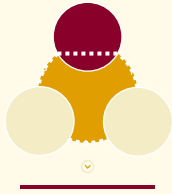


PRINT21

Implementation Program
Recommendations, Projects and Initiatives 2001 to 2004



AUSTRALIAN PRINTING - KEY DRIVERS FOR COMPETITIVE ADVANTAGE



KEY DRIVER

Sell total business solutions

Recommendations

- 1. Collate industry information
- 2. Develop international markets
- 3. Respond to future trends
- 4. Identify regional opportunities
- 5. Provide business tools
- 7. Encourage innovation

Recommendation	Tasks	Implementation Responsibility	Timing - from date of launch	Funding Source
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Recommendation 1: COLLATE INDUSTRY INFORMATION

Develop, implement and maintain an information system to assist in monitoring the industry's performance across a range of financial and operational parameters including growth, profitability, competitiveness, resource and material use in printing processes.

Collate industry wide statistical information on a quarterly basis:

- Investigate the current sources and levels of value-adding in the industry;
- Produce and disseminate annual reports on industry performance;
- Develop key operational benchmarks to assist firm based planning and adjustments.

This may involve:

- Surveying the industry for relevant data and information; or
- Developing and validating parameters for the industry and its sectors.

Industry
12 mths
Industry

Recommendation 2: DEVELOP INTERNATIONAL MARKETS

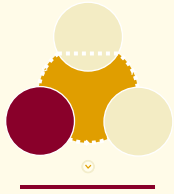
Develop market opportunities, responding to and meet international competition.

Study the potential for Australian industry to reverse the trade deficit in printed products and disseminate the findings to industry and government.

- Undertake a study into the factors that have led to successful exporting activity in some sectors of the industry with a view to developing an export culture in those sectors where opportunities may not have been fully exploited, and disseminate the findings to industry and government.
- Undertake a study of the approaches other Australian industries have taken, or are taking, to lift their international competitiveness. These industries could include the Wine Industry (for export growth) and the Building and Construction Industry (small and medium emerging exporters).
- Undertake a study of the approaches other national printing industries and selected overseas firms have taken to lift their export performance in those countries whose industries have a significant impact on the global printing industry and those countries whose industries have similarities (and notably differences) with the Australian industry.

Industry/ Government (ISR/DFAT, Austrade)
6 months
Industry/ Government

Recommendation	Tasks	Implementation Responsibility	Timing - from date of launch	Funding Source
Recommendation 3: RESPOND TO FUTURE TRENDS				
Develop industry information and knowledge to enable the industries to respond to emerging scenario issues and trends	<p>Develop a service to the industry to gather, interpret and disseminate information and knowledge on emerging issues and trends, both domestic and international, that may impact in the medium and long term.</p> <p>Conduct annual or bi-annual review of possible scenarios for industry's future growth and development, and disseminate to industry.</p>	Industry	24 months	Industry
Recommendation 4: IDENTIFY REGIONAL OPPORTUNITIES				
Assess opportunities in regional Australia	<p>Undertake a study to identify opportunities for the printing industry in regional Australia and to identify ways in which the printing industries can contribute more to regional Australia. The study will include the development of scenarios for dissemination to the industry.</p>	Industry/ Government (ISR, DTRS)	3 to 6 months	Government/ Industry
Recommendation 5: PROVIDE BUSINESS TOOLS				
Assist firms in the printing industry to develop effective business strategies and strengthen relationships with their customers and suppliers	<p>Provide enterprise development tools and initiatives to help firms implement business strategies and plans, focused on customers' needs, through available industry and government support programs.</p> <p>Find and/or develop successful demonstrations of value chain/ supply chain management practices, as well as networks and other linkages, within the industry. Promote these demonstrations throughout the industry.</p> <p>Survey customers' needs and disseminate findings to firms within the industry.</p> <p>Printing Industries to develop an Action Plan, based on the PRINT21 strategic framework and diagnostic tools, for providing enhanced service and facilities to continue and sustain industry culture change.</p>	Industry	24 months	Industry



KEY DRIVER

Invest in your people

Recommendations

6. Provide people solutions

7. Encourage innovation

Action & Recommendation	Tasks	Implementation Responsibility	Indicative Date of Completion	Funding Source
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Recommendation 6: PROVIDE PEOPLE SOLUTIONS

Assist printing firms to increase their investment in people to achieve solution-oriented sales and marketing functions and improved business management practices.

Having regard to existing training arrangements and reforms supported by industry, industry and Government (ISR, the Department Education, Training and Youth Affairs and the Australian National Training Authority) should:

- Review and develop training and education initiatives, in conjunction with training providers, to provide the skills and training needed by printing firms in the future.
- Present this review and possible new initiatives to the National Printing Industry Training Council (NPITC) and other training providers for feedback and discussion.
- Provide training and education initiatives, in response to the review and feedback, through the training bodies and through available industry and government support programs.

Assess the relevance to the industry, particularly small to medium businesses, of template style workplace agreements.

Establish an annual awards program for customer service and satisfaction, judged by non-industry professionals, e.g. major printing customers.

Industry/ Government (ISR/ DETYA)	6 to 9 months	Industry/ Government
Industry/ Government (DEWRSB)	6 months	Industry/ Government
Industry	18 months	Industry

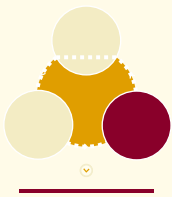
Recommendation 7: ENCOURAGE INNOVATION

Assist firms to increase their R&D and innovation and encourage development of innovation centres in new technologies and business management

Undertake a study of R&D and innovation issues for the industry, including approaches to encourage firms to increase their innovative activities through networking, cooperative research centres, centres of excellence, training centres and business management schools.

Industry/ Government (ISR)	6 to 9 months	Industry/ Government
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Recommendation	Tasks	Implementation Responsibility	Timing - from date of launch	Funding Source
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KEY DRIVER

Manage your technology

Recommendations

7. Encourage innovation

8. Assess low capacity utilisation

9. Improve capacity utilisation

10. Leverage technology and IT

11. Promote Industry Capability

Recommendation 8: ASSESS LOW CAPACITY UTILISATION

Assess the nature and extent of low capacity utilisation

Develop an accurate measure of capacity utilisation
Assess whether there is a sub-optimal or misallocation of capital investment in the industry viz., the opportunity cost of current levels of investment in technology.

Industry

6 months

Industry

Recommendation 9: IMPROVING CAPACITY UTILISATION

Determine a range of actions that could be taken in the industry to improve capacity utilisation

Investigate mechanisms to address industry over-capitalisation and the degree of urgency for implementation.
Disseminate across the industry, information on the issues and implications of industry over-capacity, and the suggested mechanisms for its management.

Industry

6 months

Industry

Recommendation 10: LEVERAGE TECHNOLOGY & IT

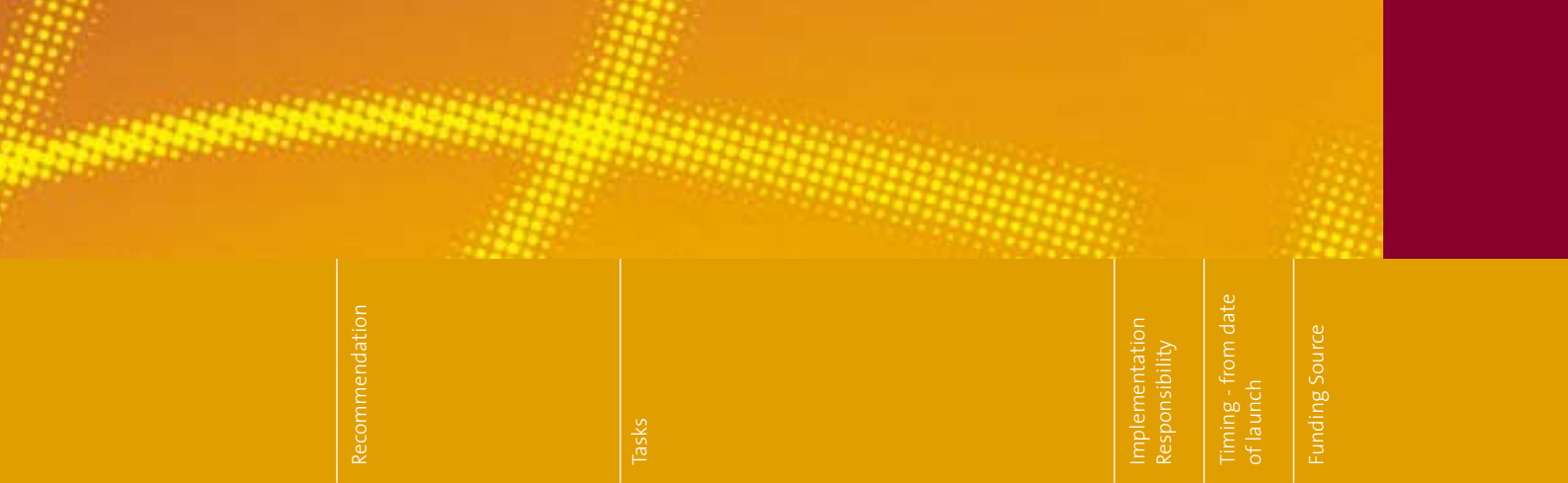
Assist firms in the printing industry to manage technology and leverage IT competencies

Promote the need for appropriate technology management within the industry through the Action Agenda communications strategy, ongoing surveys, regular reports and seminars.
Investigate the need for investment and development of communications networks and bandwidth infrastructure to support more efficient data transmission and storage. Liaise with the appropriate government agencies (e.g. DCITA) and telecommunications companies to address these needs.

Industry/
Government (ISR)

6 to 9 months

Industry/ Government



Recommendation	Tasks	Implementation Responsibility	Timing - from date of launch	Funding Source
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Recommendation 11: PROMOTE INDUSTRY CAPABILITIES

Assess and promote the printing industries' capabilities and promote these to potential customers

Undertake a capability audit of the industry, including a technology audit, to identify the products, services and expertise available in Australia.

Develop and implement a communications plan to promote the capabilities and role of printers to customers and the broader community

Produce a package of promotional material, named "**PRINT21** — Australian printing Navigating the 21st century" that incorporates the Action Agenda initiatives and communications plan, as well as other appropriate industry and government programs.

Industry
6 months
Industry

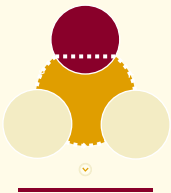
Recommendation 12: ESTABLISH IMPLEMENTATION GROUP

Establish an implementation group to carry out the Implementation Program

Establish an implementation group, beyond the Action Agenda process, to implement the current recommendations of the Action Agenda and to articulate and implement the subsequent phases. The implementation group will provide a coordinated approach to the firm based and industry-wide activities.

The implementation group will identify projects and activities that may be eligible for funding under the Government's Book Production EPICS Grants scheme and other Government programs.

Industry/ Government
3 months
Industry



KEY DRIVER
Sell Total Business Solutions
Recommendations
 12. Establishment of Implementation Group

Implementing the Action Agenda

Printing Industry Competitiveness Scheme (PICS)

The Printing Industry Competitiveness Scheme (PICS) has been designed to compensate book printers for the costs of duty on paper inputs. Its objective is to improve the competitiveness of the Australian book printing industry by reducing the effect of negative assistance encountered as a result of the termination of the Book Bounty in 1997.

The scheme is to operate for the period 1 January 1999 until 30 June 2003. It will cover paper used in the production of eligible books completed on or after 1 January 1999 but before 1 July 2003.

Book printers will be able to claim payment of 4% of their paper purchase price to compensate for the effect of duty on their paper inputs. All paper used in the production of eligible books, whether actually imported or not, and whether duty was actually paid or not, will be eligible under the scheme.

Book Production EPICS Grants

A further initiative of **PRINT21** is the Book Production - Enhanced Printing Industry Competitiveness Scheme (EPICS) Grants. The Government has committed \$48 million over four years to EPICS to assist industry achieve the goal of becoming more competitive.

EPICS has two elements:

- An Enterprise Development Fund (EDF) to assist firms involved in book production by encouraging the use of innovative technologies, improved business practices, training and skills development.
- An Infrastructure and Industry Growth Fund (IIGF) which will provide assistance for proposals aimed at delivering industry wide benefits.

The primary objective of EPICS is to revitalise the Australian book production industry. EPICS have been developed bearing in mind the findings of the Action Agenda.

Implementing the Action Agenda - *Support Programs*

Self Help Business Diagnostic Tools

For the first time the Australian printing industry has available to it a set of diagnostic tools specifically designed to deal with the highly dynamic circumstances in which printing industries around the world now operate.

The design of these diagnostic tools draws on international experience. Similar tools have been successfully deployed by a number of European printing industries.

Business success is more likely to follow if the following conditions can be met:

- The firm has a clear idea of why it is in business.

- The firm has a clear understanding of how it fits in the broader scheme of things, viz., the economy, the industry, etc. It continuously monitors and re-assesses the implications of change that will inevitably occur in its operating environment.

- The firm knows exactly who it is competing with.

- The firm has a deep understanding of its customers; what needs they have; how customers' preferences may be shifting or indeed, understand how customer preferences may be shifted to the firm's advantage.

- The firm understands where value is, or can be created, within the firm. The Action Agenda has shown that so often, areas that can create value in printing firms are either undervalued or not valued at all.

- The firm has an understanding and has in place, appropriate systems and methods for financial analysis and planning.

- The firm is able to identify and manage to best effect, all resources within the firm that add or create value. Here value creating resources will include: human capital, organisational capital, relationship capital (eg. formal and informal networks)

- The firm is able to articulate strategies which favourably position it with respect to the competition.

EPICS Client Manager Service

A Client Manager Service has also been established to assist Australian book producers to develop proposals and applications for EPICS funding and to help improve access of firms to other relevant government sponsored industry support programs.

Value Chain Management Program

The Value Chain Management Program is part of the Australian Government's commitment to creating stronger, sustainable and internationally competitive Australian industries. The Program helps fulfil the Government's commitment to increase the effective exploitation of knowledge by industry, build durable partnerships between successful firms and assist specific sectors to capture emerging business opportunities and overcome barriers to growth.

The purpose of the Value Chain Management Program is to demonstrate how effective value chain management can benefit Australian industry by increasing competitiveness of individual firms and assisting the pursuit of growth opportunities within specific industry sectors. The Value Chain Management Program will also demonstrate the commercial benefits that can be obtained when companies at different points in a value chain co-operate to use the knowledge and information they share in highly productive and innovative ways.

There are currently six to eight projects in the printing and publishing industries being undertaken as part of this program.

In addition to the Value Chain Management Program, there are a number of other government sponsored support programs able to be accessed by firms in the printing industry. These programs are administered by AusIndustry and include:

The R&D Start Program


The R&D Start Program is a competitive, merit-based program which supports firms to undertake research and development and related activities.

This program has total funding of \$1 billion over eight years from 1998-99. It is expected that there will be new grants and loans approved to the value of \$180 million this financial year.

The Technology Diffusion Program

The Federal Government's Technology Diffusion Program helps industry and researchers to access and adopt new and leading edge technologies developed in Australia and overseas. By promoting innovation, the Program will help Australian industry to become more competitive.

The Program commenced on 1 July 1998 and will run until June 2002. Over this period about \$90 million will be provided to industry and the research community.



The program has two elements - Technology Alliances and Technology Transfer:

- Technology Alliances identifies opportunities for technology diffusion and industry innovation flowing from Australia's involvement in global science and technology.
- Technology Transfer improves access for Australian industries to the best available technology opportunities and develop pathways to industry growth.

Austrade

Austrade also offers a range of assistance to firms that are looking to begin exporting. Further information can be gathered from the Department's website www.austrade.gov.au or by calling their Export Hotline 13 28 78.

Export Market development Grants (EMDG)

This scheme is designed to encourage Australian exporters to seek out and develop overseas markets. Details of the scheme and eligible expenditure categories may be obtained from the Export Hotline or website (above).

Access USA

Austrade has also developed a program called Access USA. It provides Australian business with a professional resource for business intelligence and consulting services.

Export Access

Export Access assists Small and Medium Enterprises (SMEs) to become sustainable exporters.

Export Access is not a grant scheme. Export Access provides SMEs with a flexible package of training and practical assistance which guides firms to success in developing export markets.

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Web Graphics

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(Steering Committee, **PRINT21** Marketing Committee)
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Victorian State Manager
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Mr Matthew Penfold

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Managing Director
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Mr Jordan Reizes

(Working Groups 2)
Business Development Manager
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Ms Anni Rowland-Campbell

(Steering Committee, Working Groups 2
and 3, **PRINT21** Marketing Committee)
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Graphic Arts Merchants Association of
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Mr Angus Scott

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President Graphic Arts Merchants
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General Manager
Art Roller Coverings

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Mr Rod Spencer

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Mr Laurie Strickland

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Mr Hagop Tchamkertenian

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Mr Arthur Williamson

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