



**'If we don't change direction,
we might end up where we're
heading!'**

-Jodi Picoult-

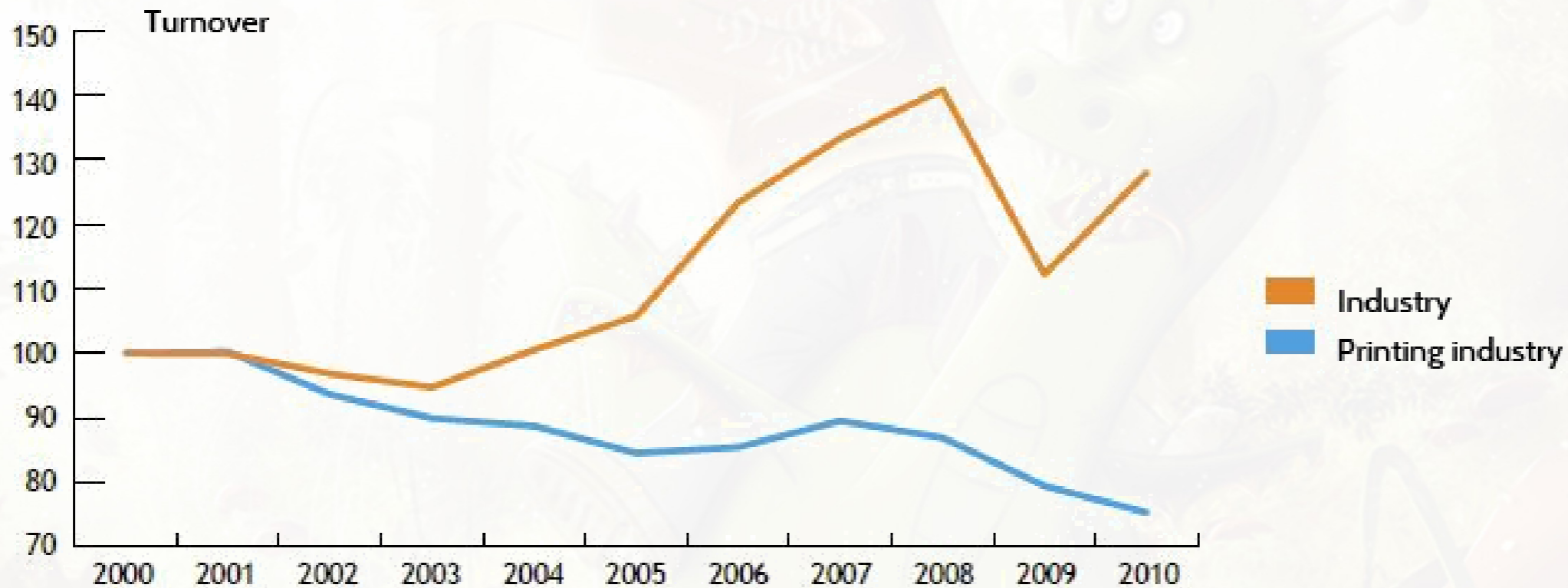
**International Circle, Toronto,
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Erik Stevens & Henk Vermeulen

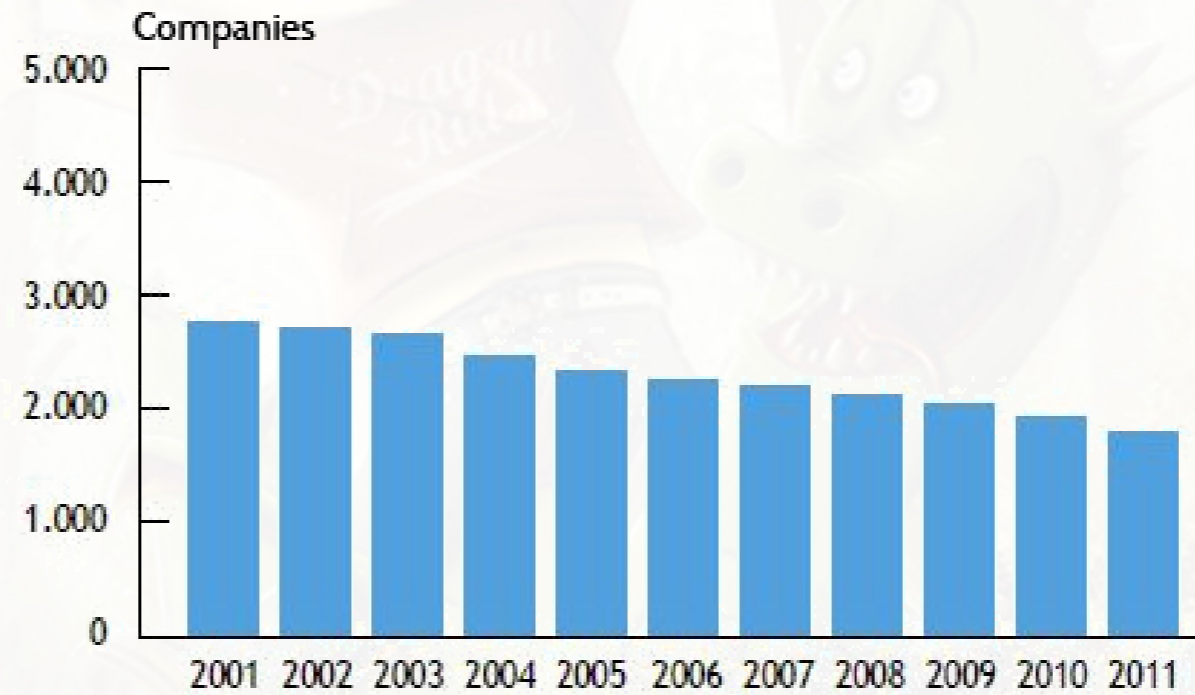
Introduction: What can you expect from us?

1. Why this presentation? The changing playing field for graphical companies in The Netherlands.
2. Why this presentation? The changing playing field for graphical education in The Netherlands.
3. Conclusions: what could this mean for you?

The market: how the Dutch graphical industry is dwindling

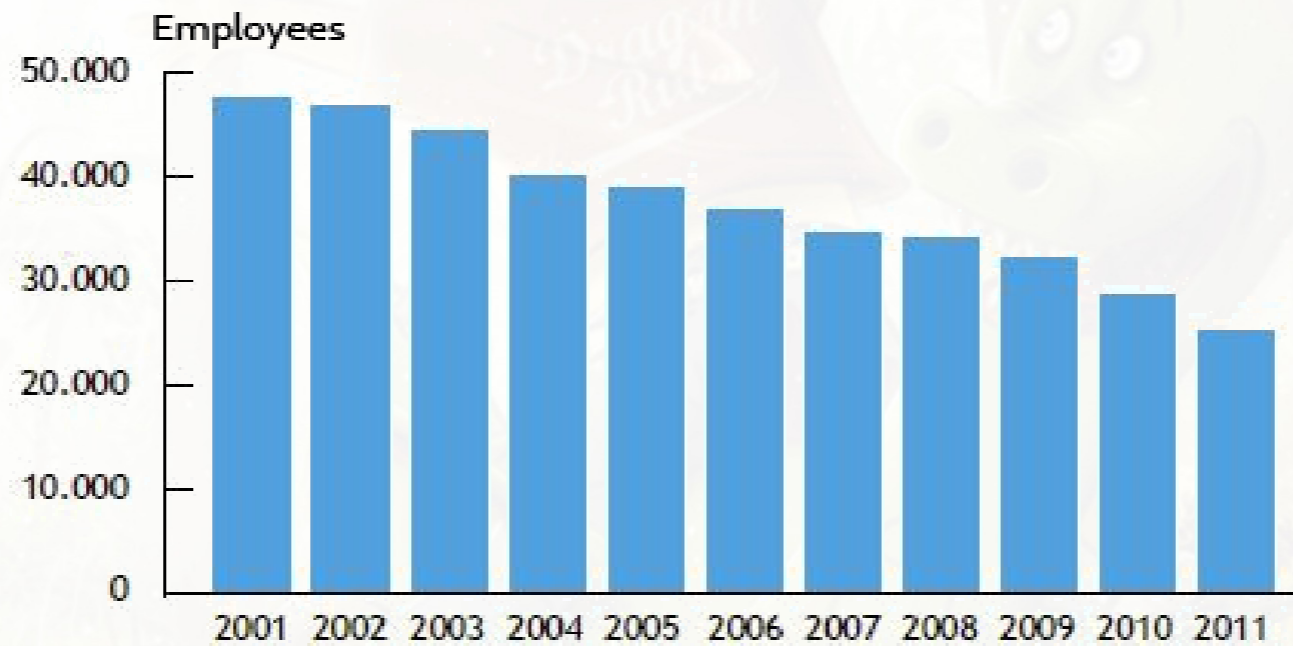


The market: how the Dutch graphical industry is dwindling



	2010	2011
Prepress	170	165
Printing	1.403	1.315
Afterpress	139	125
Other	217	201
Total	1.929	1.806

The market: how the Dutch graphical industry is dwindling



	2010	2011
Prepress	1.276	1.137
Printing	21.100	18.726
Afterpress	3.284	2.962
Other	2.867	2.369
Total	28.527	25.194

The market: how the Dutch graphical industry is dwindling

The figures for the next 3 years are identical. We expect a further drop of 10% per year.

Main causes:

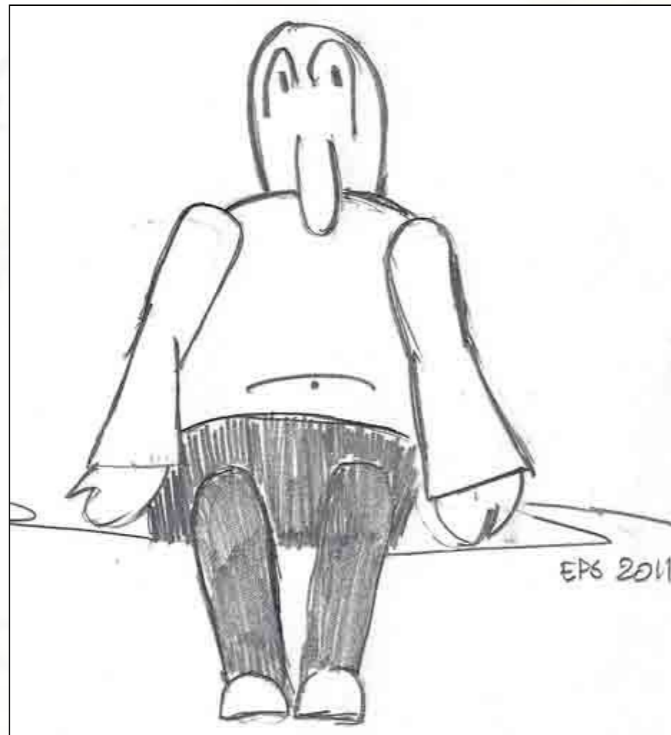
- internet
- Substitution
- Cross media campaigns
- Wrong strategies

In this shrinking market...

The main reaction of graphical companies is a PAVLOV reaction:

- Internal focus
- Improve efficiency
- Invest in higher productivity (machines)
- Cut costs (labour)

The result? Less customers...



ers? We do our best!

“we have modern press capacity”

“We realize ultra short production time”

“We guarantee a high quality level”

“We have short lines in our organization: one contact who is responsible and always takes responsibility”

In a shrinking market...

In this context, a graphical company can focus on:

“Doing the things right”



High(er) Efficiency



Low(er) Cost

In a shrinking market...

Or the company can focus on:

“Doing the right things”



High(er) Effectiveness



More Added Value
(NEW SERVICES)

On the **RIGHT** track with new concepts:

- Graphical companies can get back on track by:
- **REDEFINITION**: “We are not (only) a production company but part of the **CREATIVE INDUSTRY**”
- This new focus leads to: **CREATIVE PROBLEM SOLVING** & a **BROADER SPECTRUM of POSSIBLE SERVICES**

An example: The RETAIL specialist

- Small graphical company, retail chains as customer
- Logistic Services: delivering the exactly needed in-store material per outlet
- The real problem of retailers: realizing more traffic to every shop/outlet
- New services targeted on realizing more and loyal traffic, e.g. narrowcasting system with 'advertising' by local clubs and associations in combination with a system for making donations

Part 2:

The changing playing field for graphical education in The Netherlands.

The market: how the Dutch graphical education is dwindling

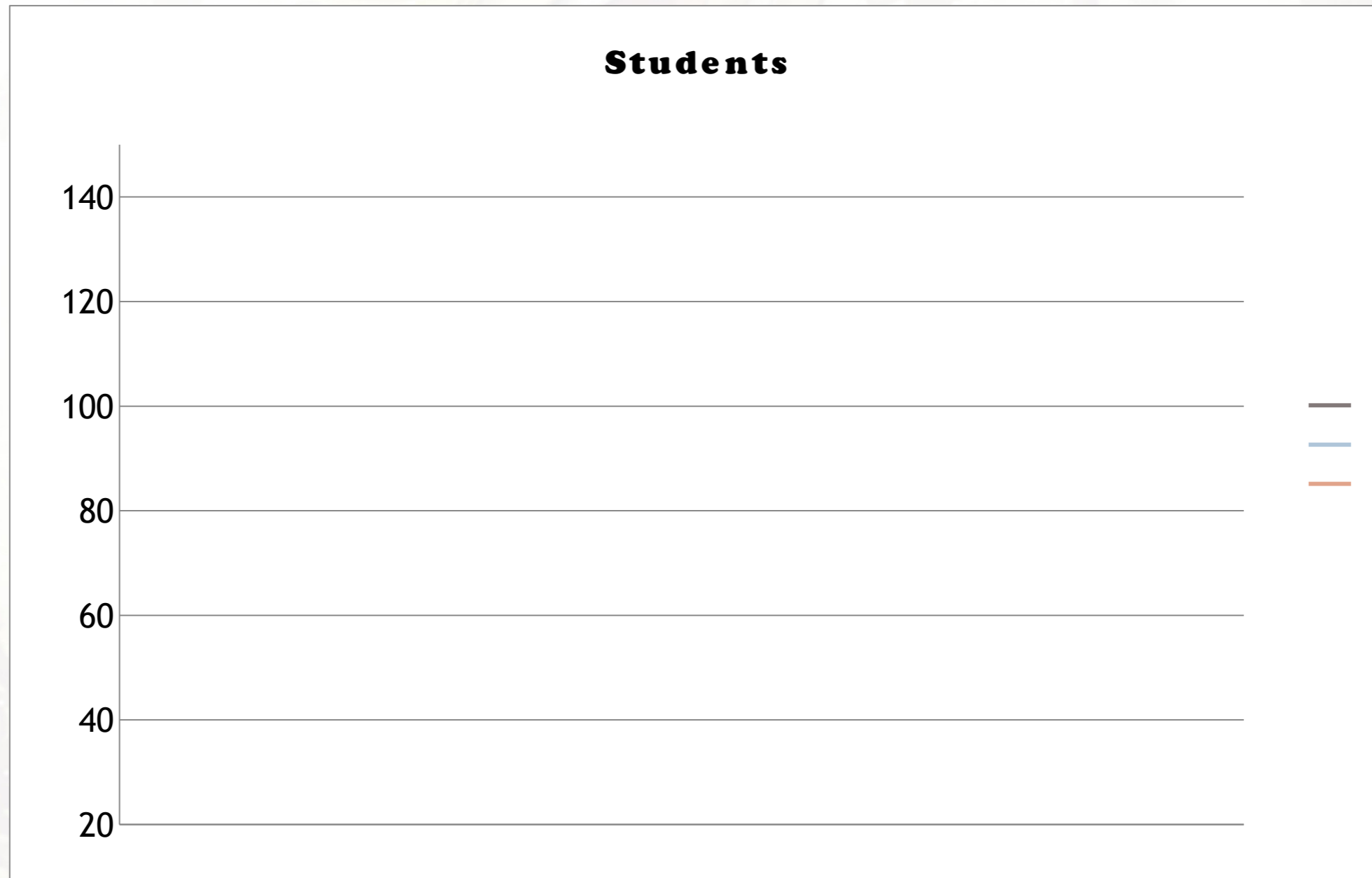


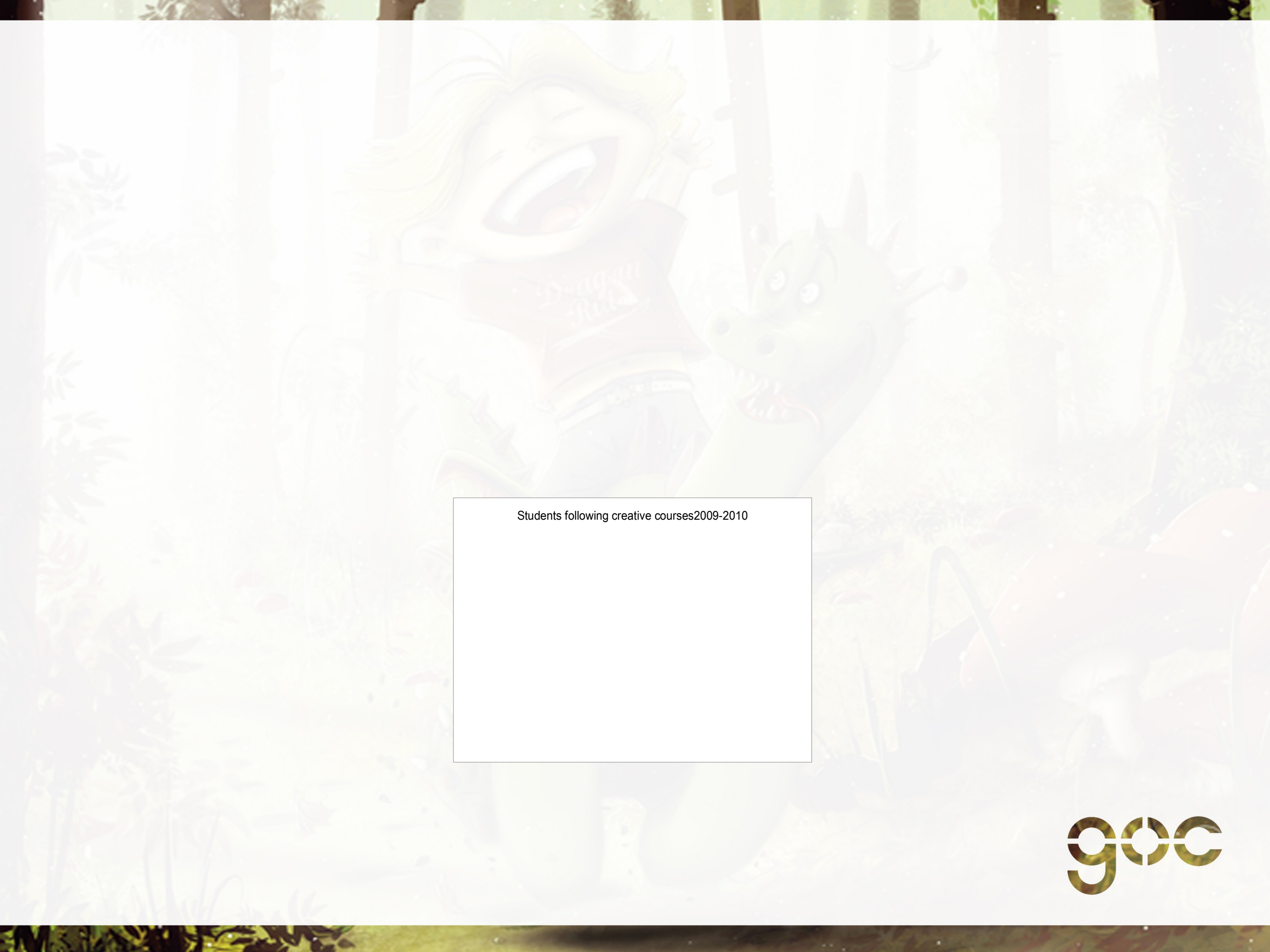
In this shrinking market...

There is a tendency to a PAVLOV reaction:

- Internal focus
- Improve output (diplomas)
- Restructuring procedures, e.g. to improve collaboration

The market: choices made by Dutch graphical educational institutes





Students following creative courses 2009-2010

In a shrinking market...

In this context, an educational institute can focus on:

“Doing the things right”



High(er) Output

In a shrinking market...

Or the educational institute can focus on:

“Doing the right things”



High(er) Effectiveness



More Added Value
(NEW SERVICES)

The next step...



**STAMPED WITH
QUALITY**

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Creative Spirit...



STAMPED WITH
QUALITY

Legitimacy is provided by

- Students
- Companies

Creative Spirit...



STAMPED WITH
QUALITY

How can we

- Help students to get an income until 67 y/o.
- Help companies to achieve their objectives.

Concluding question

- Dutch social partners (unions, employers and schools) embrace this new strategy.
- How about you?



Thank you for listening!

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