

INVITATION TO JOIN THE INITIATIVE TO SHAPE THE FUTURE OF THE PAPER AND PRINT MEDIA INDUSTRY



print power's ambition

WHAT IS PRINT POWER?

Print Power is a unique organisation dedicated to **promoting print media** as a vehicle for marketing and advertising messages. It comprises companies from the entire print media value chain: production, distribution, printing, content and delivery. It represents an initiative that benefits from all the know-how and experience of the many companies that make up the paper and print media industry.

Print Power, being a collective, industry-wide and multi-sector initiative, will command attention and be delivered with the authority that individual companies, associations and countries simply cannot command.

Print media's benefits are based on certain unique qualities. The printed word triggers the mind and engages the imagination. And because paper and print can make a deep impression on readers, brands benefit.

OUR AIM

To ensure that print media maximises its share of advertising expenditures in the dramatically changing media landscape, by promoting magazines, newspapers, catalogues, brochures, leaflets, direct mail, annual reports and other printed material as advertising and communication channels, through effective and relevant advertising and marketing campaigns.

promote
print
media

This booklet explains the Print Power Programme and is an open invitation to new members to join an initiative that will shape the future of the paper and print media industry for many years to come.

ONE ORGANISATION, TWO BRANDS

Print Power, the organisation, consists of two brands, each with its own message: **Print Power**, the Effectiveness Campaign; and **Two Sides**, the Sustainability Initiative.

The message of the Effectiveness Campaign is about how print media can serve as an effective marketing and advertising tool, whereas the message of Two Sides is about informing the world at large about the positive environmental aspects of paper and print and, through the use of factual and authoritative information, ensure that paper and print is seen as a sustainable media.



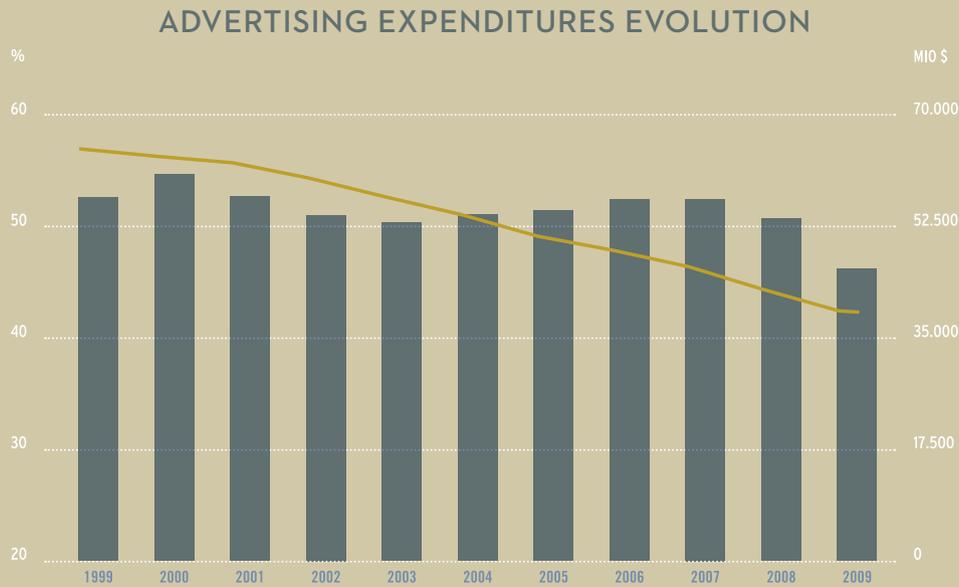
www.twosides.info

OUR STRATEGY

Print Power's central strategy is based on the creation and delivery of communication which supports the ambitions of these two brands. Key messages, developed in conjunction with input from twelve Country Teams and experts drawn from Print Power's membership, will be distributed in every country via the network of national Print Power organisations, which will focus their attention on advertisers and their agencies, promoting the use of print media. This strategy recognizes that each type of print media—mass media or targeted media, for example—plays an important role in an integrated 360 degree media plan.

What is critical, however, is that print media, be they brochures, advertisements or mailings, must be seen to be invaluable as part of any media plan, if brands aim to be successful.

print media's opportunities in europe



(SOURCE: ZENITHOPTIMEDIA)

FACING THE MUSIC

In 1999, print media represented a 57.2% market share of advertising expenditures. Today, that has dropped to 42.6%. The forecast for 2010 is an additional drop of 3.1%. In addition, the prediction is that direct mail volume will decline between 2008 and 2012 by 25% (Source: ZenithOptimedia).

These are only predictions, but unless the paper-and-print Value Chain wishes to be a passive observer of our media's decline, action is required. Sitting on our hands is not an option, and Print Power is our response.

All sectors are affected, but perhaps most dramatically, the paper industry, which today relies heavily on advertising budgets' spend on print media.

It is estimated that approximately 65% of total paper use is advertising-dependent. Therefore, in our approach, we focus in on this key variable, which ultimately determines our goals, messages and channels.

In formulating our response, it is important to recognise the challenges that the print media industry faces. We cannot be stuck in denial. Currently, there is a shift towards consumers reading more material online, which means that the circulation of print titles is diminishing and print media is becoming less appealing to advertisers. E-books and e-readers loom ominously on the horizon and, as for mail, the growth of e-communication has been significant, particularly effecting transactional mail, where conventional invoices are being replaced by e-billing.

In the present financial recession, advertisers are working with decreased budgets and are prone to using media which is more easily "dose-able," and ignoring the fact that print media is also results-driven. There is a real risk that they could stick with this kind of low-cost strategy, even when things start getting better. Furthermore, advertisers have to make tougher choices today, divvying up smaller budgets and betting on fewer horses.

EXPECTED EVOLUTION



(SOURCE: ZENITHOPTIMEDIA)

PRINT MEDIA OPPORTUNITIES

On the plus side, however, **there are opportunities**.

Both print-media advertising and direct mail ideally complement online media and television, and are very cost-effective in this role, in terms of reaching audiences. It has been shown that print media usually engages the full attention of consumers, as opposed to the often distracted attention that the new media generates.

Print on paper offers **real-life experiences** to readers, in stark contrast to the virtual, ephemeral experiences of the new media. Having something in one's hands is what reading a magazine or newspaper is all about. It is the kind of experience that we expect consumers will want to return to, so they can flee the frantic, hectic race of digital life: to have that relaxing encounter with a newspaper, catalogue or magazine, where they control the pace, flipping back and forth, actually holding the medium **physically** in their hands. It is certainly worth noting that everything today done digitally is only trying to copy this printed-paper experience – just look at how e-books are being produced.

On top of this, print media has a good track record when it comes to holding readers' attention and promoting 'deep' reading and the retention of information. And when it comes to innovation, print media has not been sitting on the sidelines.

A case in point is the so-called 'augmented reality': delivering virtual reality on a computer screen, for example, with a print advertisement, or the inclusion of QR codes in brochures or advertisements. After being scanned by a mobile phone, they can open digital music, image or data files, and link traditional print media with the new media. These innovations offer advertisers a real added value, by delivering a richer brand experience, thanks to innovations in print media.

There are opportunities!

To see how this works, follow these instructions.

3 steps to access print's role in the media mix film

- 1 download software
- 2 take a picture of the code
- 3 watch the film

for iPhone software to use the QR code can be downloaded from the iPhone AppStore
 for other mobile phones software to use the QR code can be downloaded at <http://www.upc.fi>



print media in country x

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the central and local organisations

ORGANISATION AND STRUCTURE

Print Power has set up a top-notch organisation that can implement its strategy effectively and efficiently. The driving force is the **Central Office**, whose Managing Director, Frank Leerkotte (former Managing Director of Cepifine), is responsible for fine-tuning Print Power's structure, overall coordination, finances and accounting, serving as the point of contact with Country Managers, and interfacing with the Board of Directors. Supporting him are two managers: Ulbe Jelluma (former Managing Director of BBDO advertising agency), Marketing Manager, who is in charge of marketing and communication for the Effectiveness Campaign, and coordinating the Marketing Group; and Martyn Eustace (former CEO of Premier Paper Group), the Sustainability Manager, who serves as the UK

Country Manager, creating the style and content of the sustainability messages and coordinating the Sustainability Group.

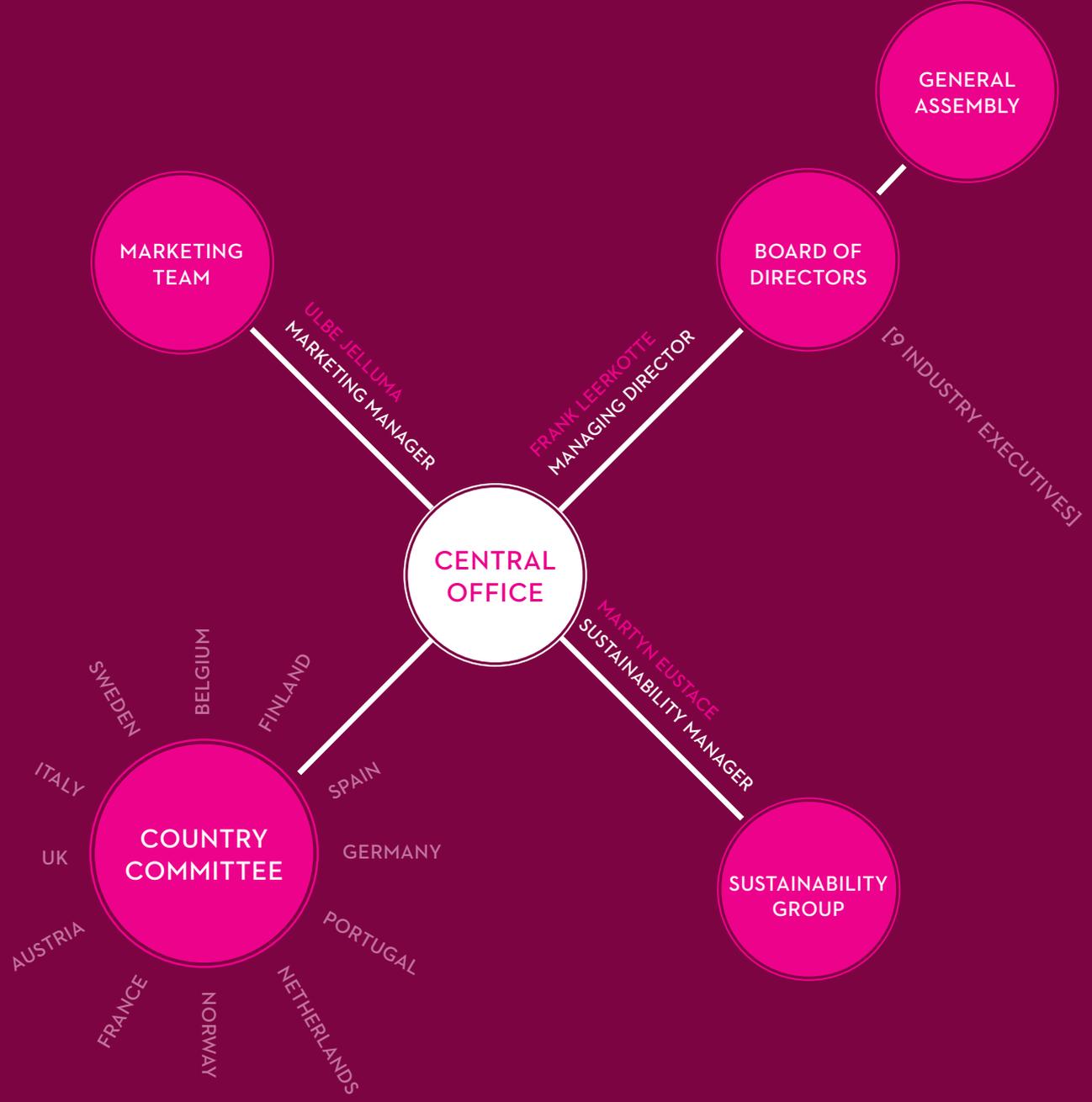
The founding members of the Print Power initiative and organisation are the paper manufacturers (represented by both Cepifine and Cepiprint), the paper merchants (represented by Eugropa) and the printers (represented by Intergraf). These members are also the largest contributors to the Print Power budget.

To have a consistent, harmonious message, and to ensure cost efficiency, Print Power's Effectiveness Campaign and Sustainability Initiative are developed and created by the Central Office, and made available to the country organisations through an exchange website. The implementation of both campaigns, however, is handled by the national Print Power organisations, as they are best equipped to tailor the campaigns to the local audience, and to select the most relevant combination of effectiveness and sustainability messages.

The **Country Manager** is the spokesperson for Print Power and is responsible for making sure that print media are clearly visible on marketing's and advertising's radar screens. Just as important, he or she recruits local membership and collects funds from new partners, develops marketing and communication plans to support Print Power, and supervises the translation and production of all marketing tools, both online and offline. In addition, the Country Manager represents his or her national Print Power organisations at central meetings, and presents plans, budgets and activities to the Central Office.

	Reporting into the Central Office is the Country Committee , which is made up of twelve Country Managers, representing Austria, Belgium, Finland, France, Germany, Italy, the Netherlands, Norway, Portugal, Spain, Sweden and the United Kingdom. The Board of Directors has nine members representing the entire value chain, and assumes final responsibilities for Print Power; the General Assembly comprises industry-sector representatives and exercises overall control of the organisation.

the print power organisations



print power activities

ORGANISATION AND STRUCTURE

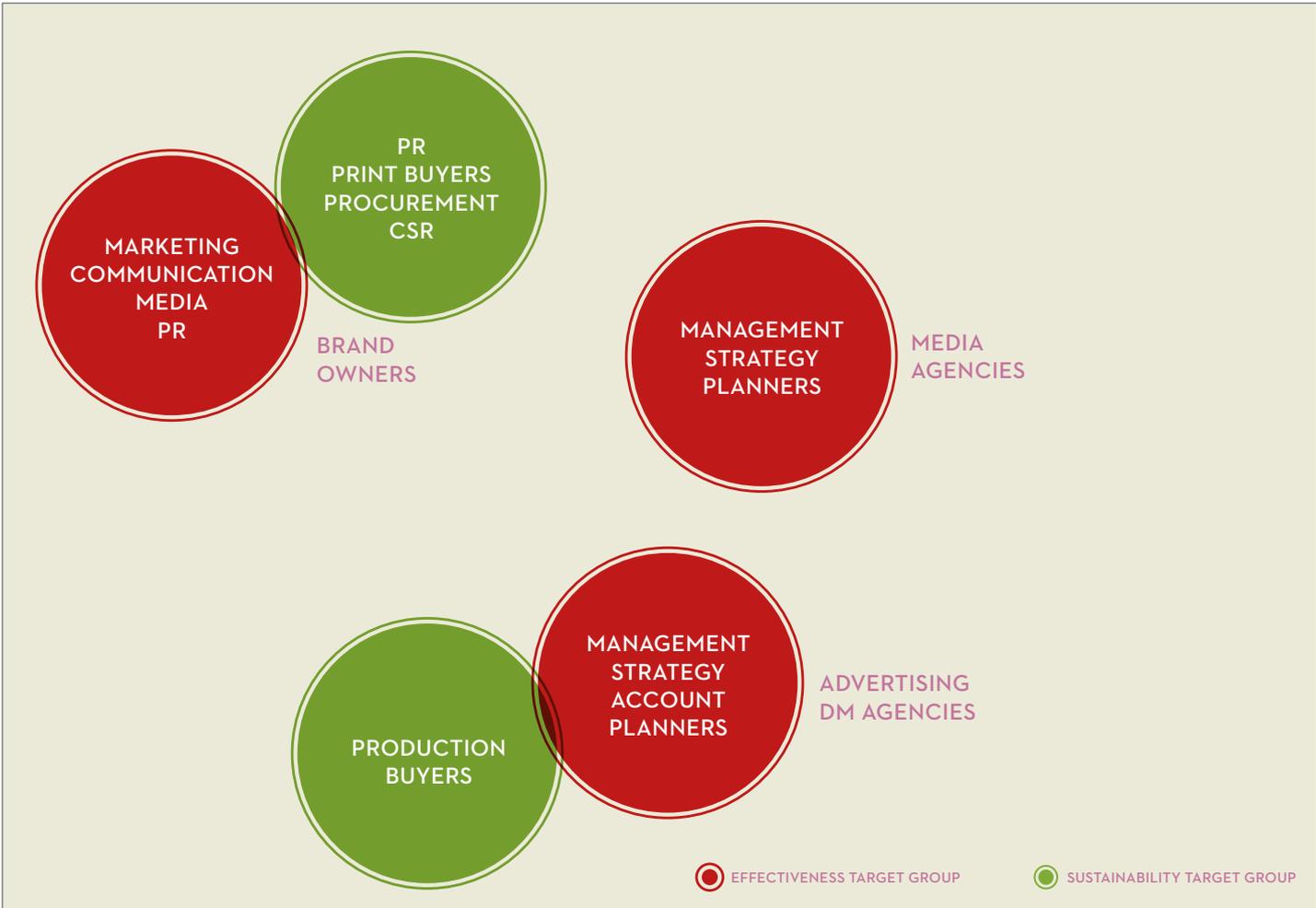
As Print Power consists of two complementary messages – the Effectiveness Campaign and the Sustainability Initiative – it is logical that each has its own activities. The role of the Effectiveness Campaign is to market print media, whilst the role of the Sustainability Initiative is to inform: exploring the myths which surround the industry and setting out the facts. It is up to the discretion of each country organisation to define the most appropriate mix of messages.

ORGANISATION AND STRUCTURE

Going forward, Print Power, the Effectiveness Campaign, will focus on one primary goal: demonstrating to those who decide their company's media mix in this new, challenging financial and media environment, the fact that **printed media is an essential and vital channel for brand success**. International, well-known cases in all sectors of the industry will be employed to get our message across, namely: print advertising and direct mail is, indeed, a very effective part of any media plan.

POS material, catalogues and corporate communication will also be featured as part of the campaign. For the moment, Print Power has a website to promote all of this, but a full-blown, no-holds-barred integrated campaign will be launched shortly.

At the heart of the plan is an integrated campaign for both pan-European and country-specific use. This campaign has been developed by the Central Office, and there will be local, kick-off events to promote it. Other key materials include press releases, advertisements, mailings, brochures and case sheets, an online resource base and a strong presence in the social media.

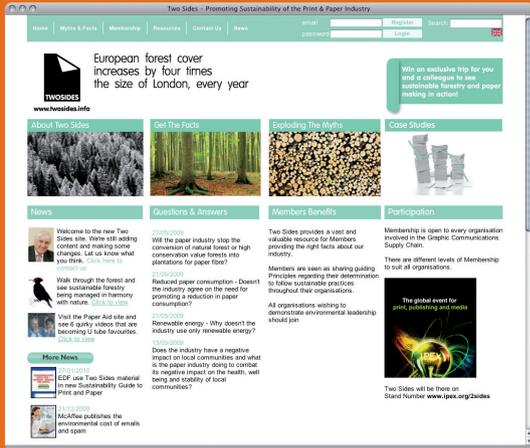


There are three principal target groups: brand owners, where we address marketing communication professionals; advertising and direct-marketing agencies; and media agencies.

Within these agencies, we will address decision-makers and strategy directors: people who decide via which channels advertising budgets are being spent.

target groups,
functions and
campaign

two sides activities



What a great sustainable idea.

Half the UK's average requirement is considered to be needed to cover laptops and PCs in the next 10 years. And that figure takes on a vibrant and renewable resource can be the sustainable way to communicate.

The European print and paper industry is already the biggest industrial producer and manufacturer of renewable energy, and over 50% of the energy used to produce paper products come from sustainable biomass.

Print and Paper is sustainable and powerful too. Research shows that around 80% of those most spread companies will go to the source. All our green believe that need is more than just an intention.

Renewable, Recyclable and Powerful.

WIN! We are looking for all you and your colleagues to tell a great environmental story to tell.

Print and Paper have a great environmental story to tell.

1.5 million football pitches of new trees. Every year.

Did you know that the area of forest coverage in Europe is increasing at the rate of 1.5 million football pitches every year?

Europe is an inherently renewable resource. In Western Europe 75% of the land area is now covered in trees and this area has grown by 20% since 1990. From the expanding forests, to date it has recycled material.

To make you need to communicate the message that print and paper are not just over the clouds, responsible, fast and easy to use. There's nothing that can be more successful or powerful.

Renewable, Recyclable and Powerful.

WIN! We are looking for all you and your colleagues to tell a great environmental story to tell.

Print and Paper have a great environmental story to tell.

THE TWO SIDES INITIATIVE

The role of the Two Sides initiative is to promote the responsible production and use of paper and print, and to dispel common environmental myths and misconceptions about the paper and print industry. This will be done by providing the entire spectrum of key players and end-users with verifiable data that clearly show why paper and print is an attractive, practical and sustainable communications medium.

The name of this initiative comes from the idea that there are always two sides to every story. And, despite many popular misconceptions, paper and print can tell a terrific environmental story. Two Sides tackles the environmental arguments head on, with a balanced, factual and authoritative approach, exploring and debunking the myths, as it sets out the facts. Its website, www.twosides.info, is instrumental in doing this, and in order to deliver its message, it offers several case studies, in addition to clearing up confusion about the paper production industry. Of course, Two Sides uses other channels as well, in order to communicate the truth about paper and print.

One such channel is advertising. Currently in the UK, there is a campaign running that will also eventually be rolled out in the rest of Europe. It highlights just how well-managed are the forests that the print media industry uses, and how diligent the industry is when it comes to employing biomass-energy production. Direct mailings remind readers that paper and print are both renewable and recyclable, and Two Sides has printed a booklet that sets out the facts about the industry. It explores in depth many of the public's widely held misconceptions.



MEASURING AND TRACKING

Effectiveness starts with measurement and benchmarks and we will measure the impact of the initiative. Therefore, Print Power will implement an effectiveness-tracking system with three indicators: advertising expenditures data, direct mail volume and changes in decision-makers' perceptions.

The latter is the most important, as perception drives behaviour: a positive perception will be expressed in increased advertising spend and more direct mail volume. Already planned for the first quarter of 2010 is a zero-measurement perception study to establish current target-audience beliefs about effectiveness and sustainability of paper and print media. This study will encompass the UK, France and Germany, and will be conducted through telephone interviews.

THE PRINT POWER BUDGET

The budget structure consists of two levels: central and local. Each country receives funding from the central budget.

The national Print Power organisations must then match the equivalent of this allocation through their local partners. These partners can support Print Power financially, or by services in kind. Whenever these services are provided, their value is incorporated into the local budget.

the paper and print value chain



Planning would amount to nothing if we did not have dedicated partners. Clearly, one of the critical linchpins in the success of Print Power is the involvement of our partners, representing eighteen European associations that cover the entire value chain: pulp and paper production; paper distribution; printers, envelopes, ink, pre and post press and digital-press manufacturers; newspaper and magazine publishers and content providers; direct mail; postal operators; and magazine and newspaper distributors as its representatives.

Print Power partners provide support financially, or via services in kind. Some organisations choose to provide this support centrally, whilst others support local country activities.

BECOMING A PARTNER

It is clear that for Print Power to be successful, membership must encompass as many organisations as possible: those which endorse both Print Power's Effectiveness message and Two Sides' Sustainability message.

By contributing money or services in kind to Print Power, sustained activities can be maintained in every market, addressing local needs and maximising opportunities for the position of print media.

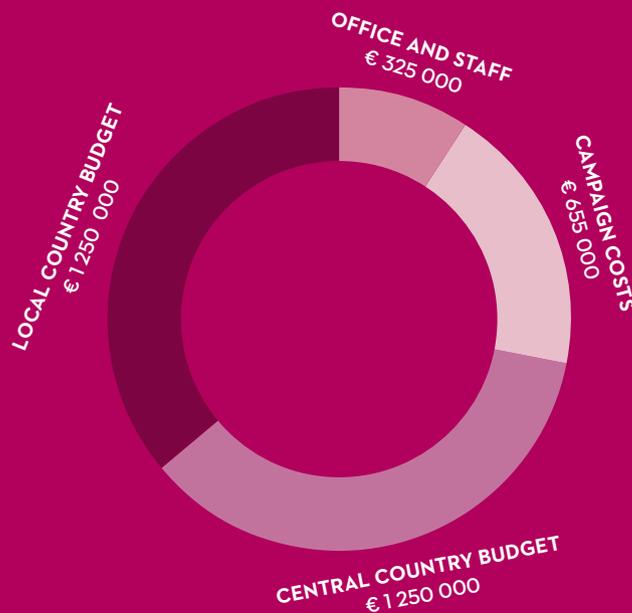
local print power partners

REPRESENTED SECTORS	A	B	D	ES	E	FR	I	N	NL	P	S	UK
PAPER PRODUCERS	■	■	■	■	■	■	■	■	■	■	■	■
PAPER MERCHANTS	■	■	■	■	■	■	■	■	■	■	■	■
PRINTERS	■	■	■	■	■	■	■	■	■	■	■	■
INK PRODUCERS	■	■	■	■	■	■	■	■	■	■	■	■
ENVELOPE PRODUCERS	■	■	■	■	■	■	■	■	■	■	■	■
EQUIPMENT MANUFACTURERS	■	■	■	■	■	■	■	■	■	■	■	■
MAGAZINE PUBLISHERS	■	■	■	■	■	■	■	■	■	■	■	■
NEWSPAPER PUBLISHERS	■	■	■	■	■	■	■	■	■	■	■	■
DIRECT MARKETING	■	■	■	■	■	■	■	■	■	■	■	■
POSTAL OPERATOR	■	■	■	■	■	■	■	■	■	■	■	■
OTHER (INCL. RECYCLING INITIATIVES)	■	■	■	■	■	■	■	■	■	■	■	■
PRO-PRINT CAMPAIGN		PAPER CHAIN FORUM	PRINT WIRKT	GRACIAS PAPEL		CULTURE PAPIER					POWER OF PRINT	TWO SIDES

In addition to working with partners, Print Power is looking to establish relationships with other Pro-Print campaigns, creating further exposure, avoiding duplication of costs and harmonising activities. The national Print Power organisations have already started discussions with these existing campaigns.

dedicated partners

financials and benefits



THE MULTIPLIER EFFECT

By now, you should be ready to sign up and become a partner. But what you really need to know about is the multiplier effect: one of the most exciting aspects of Print Power. Basically, this means that by investing in Print Power you benefit from the existing budget of over 3.4 million euro, funded by partners throughout the value chain. **The exposure of your investment is multiplied** by the already committed budget. A typical individual investment will never have the exposure and impact that can be obtained by contributing to our collective budget, and that is why we call it the multiplier effect.

PARTNER CONTRIBUTION

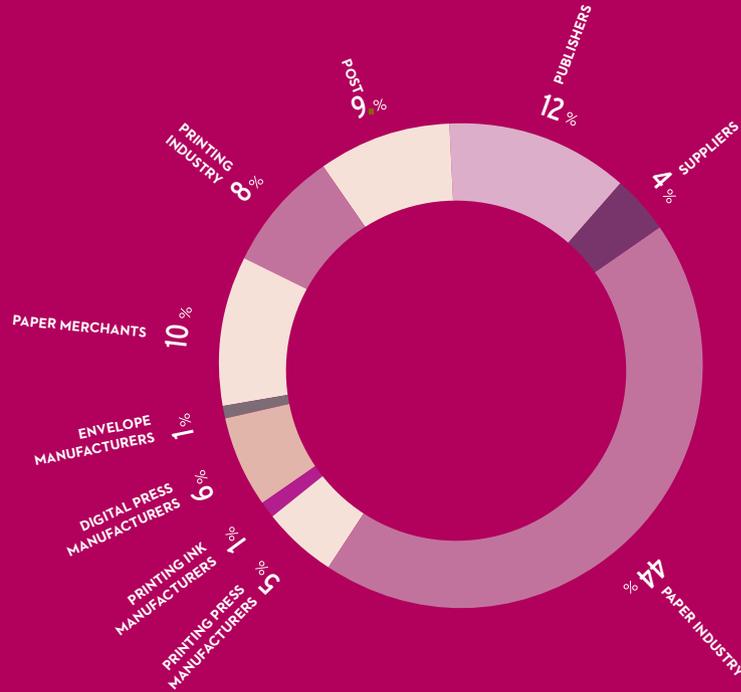
In order to finance the local campaign, partners can contribute in two ways:

Investments in cash, or in services in kind; for example, free advertising space, free printing, free envelopes, free postage, free addresses, free handling, free personalisation, etc. Either way, the contribution benefits the national Print Power organisations, as it enables the running of the Effectiveness and Sustainability campaigns.

Country Managers organise this fundraising. As a guide, contributions are normally €35 per million sales turnover, with a minimum of €500 for larger organisations and €150 for printers and small businesses.

Because Print Power is focused on promoting print media across the board, every partner profits from the marketing and advertising campaigns. Your return on investment may be difficult to calculate precisely, but rest assured that—as they say in Texas—you get a lot of bang for your buck. A rising tide lifts all boats, and Print Power is fully committed to raising the tide in the European paper and print media industry.

print power partners and their contributions

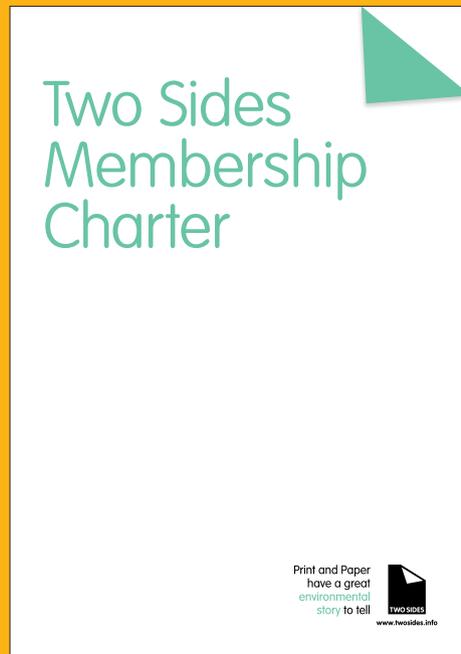


PARTNER BENEFITS

In addition to multiplying your investment by a significant factor, becoming a partner offers many other benefits:

- Becoming an integral part of a unique pan-European initiative that is specifically focused on promoting your business
- A raised profile as an organisation committed to the success and sustainability of the industry
- Access to materials, facts, research and information about the effectiveness and sustainability of the industry that can greatly assist in client meetings and presentations
- Regular information on new campaigns and techniques which increase the importance of print channels in integrated media campaigns
- Opportunities to meet potential clients at activities organised by the Print Power organisations in your country
- Member access to the Print Power and Two Sides websites, where members can promote their own business activities
- Networking with colleagues from the entire value chain
- Demonstrating your commitment to the initiative, by including the Print Power and Two Sides logo on all your communication materials

committed to print power



As with any initiative, commitment is tantamount to success. One important aspect of demonstrating commitment is having a Charter, and Print Power expects to use a Charter throughout Europe, based on the one currently employed by Two Sides in the UK.

The Charter defines various aspects of Print Power's activities and reinforces by principles members' commitment to sustainability.

But just having a Charter does not ensure commitment. That must come from those managing the initiative, and from partners. Because it is a first-of-its-kind initiative, involving the entire paper-and-print value chain, an especially **strong commitment is needed to make it work.**

There are many good reasons to commit to Print Power's three-year campaign, but there can be no question in anyone's mind that the most important part of the commitment is to be part of the group that is going to shape the future of the paper and print media industry.

pan-european partners

CEPI, Confederation of European Paper Industries
www.cepi.org

CEPIFINE, European Association of Fine Paper Manufactures
www.cepifine.org

CEPIPRINT, Association of European Publication Paper Producers
www.cepiprint.com

DISTRIPRESS, Network of the International Press Distribution
www.dstripress.net

ENPA, European Newspaper Publishers Association
www.enpa.be

EPC, European Print Council
www.epceurope.org

EPIS, European Pulp Industry Sector
www.epis.org

ERA, European Rotogravure Association
www.era.eu.org

EUGROPA, European Paper Merchants Association
www.eugropa.com

EUPIA, European Printing Inks Association
www.eupia.org

FAEP, European Federation of Magazine Publishers
www.faep.org

FEDMA, Federation of European Direct and Interactive Marketing
www.fedma.org

FEPE, European Envelope Manufacturers Association
www.fepe.org

FIPP, International Federation of the Periodical Press
www.fipp.com

INTERGRAF, International Confederation for Printing & Allied Industries
www.integraf.eu

IPC, International Post Corporation
www.ipc.be

VDMA, German Association of Machinery and Industrial Equipment Manufacturers
www.vdma.org

WAN-IFRA, World Association of Newspapers and News Publishers,
www.wan-ifra.org

printpower.eu
twosides.info

**NOW, ALL YOU HAVE
TO DO IS CONTACT
US AND WE WILL
TAKE IT FROM THERE**

PRINT POWER

AV. LOUISE 250 BOX 104,
1050 BRUSSELS,
BELGIUM

