

## Minutes of the meeting of the WAN-IFRA World Printers Forum Board

Tuesday, 2018-03-27, at UPM headquarters, Helsinki, Finland, on kind invitation of Anu Ahola

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### Participants of the World Printers Forum Board Meeting

Dr. Rick Stunt, dmg media, London, UK, <b>Chair</b>	
Herbert Kaiser, Koenig & Bauer, Digital & Web, Würzburg, G., <b>Vice Chair</b>	
Anu Ahola, UPM Paper ENA, Helsinki, Finland	
Dieter Betzmeier, Bobst, Bielefeld, Germany	
Max Garrido, Corporation Bermont, Madrid, Spain	
Andreas Gierth, Frankfurter Allgemeine Zeitung (F.A.Z.), Frankfurt/Main, Germany	
Sanat Hazra, Bennett, Coleman & Co (The Times of India Group), Mumbai, India	
Dr. Michael Hirthammer, Sun Chemical, Eurolab, Karlstein, Germany	
Thomas Isaksen, DDPFF, Copenhagen, Denmark	
Menno Jansen, Q.I. Press Controls BV, EAE, Oosterhout, Netherlands	
Jan Kasten, ppi Media GmbH, Hamburg, Germany	
Rainer Kirschke, Agfa NV, Belgium	
Manuel Kosok, manroland web systems, Augsburg, Germany	
Gideon Martz, MakroSolutions, Schkeuditz, Germany	
Sally Pirri, The Globe and Mail, Toronto, Canada	
Josef Konrad Schießl, Süddeutscher Verlag Zeitungsdruck, Munich, Germany	
Peder Schumacher, V-TAB AB, Gothenburg, Sweden	
Mujo Selimović, Publisher "Oslobodjenje", Sarajevo, Bosnia and Herzegovina	
<b>WAN-IFRA Representative</b>	
Manfred Werfel, WAN-IFRA, Frankfurt/Main, Germany, <b>Secretary</b>	
<b>Number of participants</b>	<b>15</b>

## Proposed Agenda, World Printers Forum Board Meeting, Tuesday, 27 March 2018

No.	What?	Who?
1	Welcome	Vice Chair
2	Introduction of participants	Round-table
3	Approval of the minutes of the last meeting (13 October 2017)	all
4	Presentation of new UPM Head office and tour through the office building	Anu Ahola
<i>Coffee Break</i>		
5	New Board members present their companies Max Garrido, Managing Director, Corporation Bermont SL, Madrid, Spain Thomas K. Isaksen, CEO, DDPFF Den Danske Presses Faellesindkøbs-Forening, Copenhagen, Denmark Sally Pirri, Managing Director, Print Production, The Globe and Mail, Toronto, Canada	Max Garrido Thomas Isaksen Sally Pirri
6	New Board members present their companies Rainer Kirschke, Marketing Manager Newspaper, Agfa NV, Belgium Manuel Kosok, VP Technology & Development, manroland web systems, Augsburg, Germany Gideon Martz, Managing Director, MakroSolutions, Schkeuditz, Germany	Rainer Kirschke Manuel Kosok Gideon Martz
<i>Lunch Break</i>		
7	Report on the activities of the World Printers Forum World Press Trends IFRA World Publishing Expo and Digital Content Expo ICQC 2018–2020, Star Club World Printers Forum Conference 2018 Board extension 2017, Board election 2018, electoral procedure	M. Werfel, all
8	Projects in 2018 OPHAL Paper Guide, printed version, translations Implications of changing to lower grammage newsprint Effectiveness of the printed newspaper Sustainability of the printed newspaper Continuation of High-Value Print Production Mechanical Press Audits Milestones in newspaper printing history (Balaji) Review newspaper printing standard ISO 12647-3 New "Innovation in Print (Advertising)" award?	M. Werfel, all
<i>Coffee Break</i>		
9	Next meeting in 2018, on the day after IFRA World Publishing Expo at F.A.Z. office, Berlin, Friday, 12 October 2018	all
10	Other business	all
11	Concluding remarks	Vice Chair



*From left to right: Rainer Kirschke, Menno Jansen, Max Garrido, Josef Konrad Schießl, Jan Kasten, Manfred Werfel, Andreas Gierth, Sally Pirri, Herbert Kaiser, Anu Ahola, Thomas Isaksen, Michael Hirthammer, Sanat Hazra, and Gideon Martz*

## **The Minutes**

### **1 Welcome and opening of the meeting**

Since Dr. Rick Stunt, chairman of the World Printers Forum Board, had to cancel his participation last minute, Herbert Kaiser, vice chair of the WPF Board, welcomed the participants, thanked Anu Ahola and her team at UPM for their invitation, and called the meeting to order.

### **2 Introduction of Participants**

In a round-table participants introduced themselves. See the list of participants on page 1 of this document.

### **3 Approval of the minutes of the board meeting on 13 October 2017**

The minutes of the meeting of the World Printers Forum Board on 13 October 2017 were approved without changes.

#### **4 Presentation of new UPM Head office and tour through the office building**

Anu Ahola introduced a representative of the architecture office that created the concept and planned the new headquarter building of UPM in Helsinki. Together with the architect the meeting participants visited different places, meeting rooms and halls on the ground floor of the building.

The headquarter building of UPM has a number of innovative features in the areas of energy, lighting concept and sound protection. The interior of the building includes the extensive use of natural materials, especially UPM products like plywood furniture, doors and ceiling applications.

Also, a colleague of Anu Ahola gave an overview about the extension of UPM's product portfolio into a number of new areas outside the paper business. Meanwhile UPM is a strong energy company as well and creates products based on wood and fibre ingredients that range from timber to chemistry. Many of these products are able to replace mineral oil based plastic materials. A number of product samples were demonstrated and many of them surprised the audience, since participants did often not expect UPM to be active in areas like biochemicals, biocomposites, biofuels, energy, label materials, specialty papers, plywood, pulp, timber, wood sourcing & forestry.



*The UPM Biofore Concept Car*

As a demonstrative example UPM also produced a concept car and showed it at European automobile shows. UPM engineers and product designers are constantly working to discover new market niches and applications for bioforensic products.

## **5 New Board members from printing companies present their companies**

Three new WPF Board members from publishing and printing companies presented their companies and markets.

First, Max Garrido, Managing Director of Corporation Bermont SL, Madrid, Spain, presented his company and the Spanish newspaper market. His presentation slides are attached to the minutes for information.

Bermont is a newspaper printing company, operating six printing plants all over Spain including the Canary islands. Bermont operates independently from a specific newspaper publisher although publishers hold shares of the company. Bermont prints more than 100 newspaper titles with the help of a variety of offset and inkjet presses from different suppliers, including competitive newspaper titles from Spain but also from many other European and international news publishers who seek for a continual distribution opportunity in Spain.

Thomas K. Isaksen, CEO, DDPFF Den Danske Presses Faellesindkøbs-Forening, Copenhagen, Denmark, presented his company. Thomas has been a World Printers Forum Board member from 2015 to 2017 and now starts his second term on the Board.

DDPFF is the procurement company of the Danish newspaper press. They purchase, store and manage newsprint for entire Denmark. They are also involved in quality management, environmental projects and the collection of used paper and used aluminium based printing plates. With the support of DDPFF Denmark became the first European country switching from 42.5 g/m<sup>2</sup> to 40 g/m<sup>2</sup> to a great extend. Recently they managed to introduce the FSC (Forest Stewardship Council) label for all Danish newspapers. Newspapers now print the "FSC Mixed" logo on their cover pages.

Mujo Selimović asked if DDPFF would purchase materials for newspaper publishers outside Denmark. Thomas Isaksen replied that they currently only work for Danish publishers, but this is an interesting question that could be discussed for the future.

Sally Pirri, Managing Director, Print Production, The Globe and Mail, Toronto, Canada, presented her company and the market of the Canadian news publishing industry. The Globe and Mail is the leading nation-wide news publishing company in Canada with activities in print, online and mobile. The Globe and Mail started a successful partnership with the Washington Post.

They are not owning any printing plants but use five of the printing plants and the services of TC Transcontinental in different parts of Canada. Recently they switched from straight to collect mode printing. The Globe and Mail is using hybrid coldset/heatset printing with 24 pages in heatset every week to extend their offer for high-value advertising customers. For the heatset part they are using LWC paper (light-weight coated) in combination with standard and improved newsprint grades.

## **6 New Board members from supplier companies present their companies**

Two of three new WPF Board members from supplier companies presented their activities and markets.

Rainer Kirschke, Marketing Manager Newspaper, Agfa NV, Belgium, presented the market of

printing plates and what Agfa is focussing on. His presentation slides are attached to the minutes for information. Agfa-Gevaert is more than 150 years old, originally founded in Berlin and later merged with the Belgium company Gevaert. Rainer Kirschke works for Agfa since 28 years.

The actual turnover of Agfa with offices around the world is 2.5 billion € with almost half of it in the graphic sector. Other sectors are medical and materials. Agfa Graphics focusses on services, consumables, software and hardware. Its foothold is in the technical prepress area with plate making, output control and pre-press workflow systems. Thus includes – besides plates – software for screening, preflight, ink saving, as well as pressroom chemicals and even aluminum recycling.

Manuel Kosok, VP Technology & Development, manroland web systems, Augsburg, Germany, unfortunately had to cancel his participation last minute due to urgent business appointments. World Printers Forum Board members are looking forward for his presentation at the coming meeting.

Gideon Martz, Managing Director, MakroSolutions, Schkeuditz, Germany, presented the scope and activities of his company. His presentation slides are attached to the minutes for information.

MakroSolutions is active in the areas of press and mainly mailroom extensions, retrofits, software development and switch cabinet construction. Besides this, MakroSolution also supplies used equipment, especially for the mailroom. Their software development focusses on process control, machine and system control, addressing and energy monitoring. Their customer services include project management, industrial assembly, plant inspection and maintenance and production support. Makro Solution is headquartered in Germany and has customers all over the world.

## **7 Report on the activities of the World Printers Forum**

Manfred Werfel, secretary of the World Printers Forum Board, reported about the activities since the last meeting in October 2017. His presentation slides are attached to the minutes for information.

### **7.1 World Press Trends**

Manfred Werfel started with a number of innovative industry projects, like the IKEA “pee-on ad”, which was basically an ad with an integrated pregnancy test. Another innovative ad example was the talking heads on the Australian wine bottles of “19 crimes”, which was based on AI (augmented reality) technology. Last but not least there was another example of The Times of India’s integration of plant seeds into the edge of a newspaper page. They do this with the help of a self-developed system that puts small seeds onto the paper, folds, glues and perforates it in one go at full press speed. Sanat Hazra showed sample print copies to the participants.

While print showed its creative power again in recent months digital platforms came under heavy fire, especially since Facebook announced the down-ranking of quality news channels in their network. The Columbia Journalism Review talked about “The Facebook Armageddon”. Even Apple’s CEO Tim Cook said: “I don’t want my nephew on a social network”. And The New York Times wrote a remarkable article with the title “Our Love Affair With Digital Is Over”. At the same time experts are forecasting a decline of local digital advertising for the start of the next decade.

On the other hand there are indications that print advertising is better valued again by advertisers. A UK "study on the impact of media investment (...) found that print is responsible for 18% of all advertising-generated profit, the second highest proportion out of eleven advertising mediums (after TV), at an average ad-generated profit ROI over three years of £2.43 per pound spent. This was found to be far ahead of online display, which delivered an average profit ROI of £0.84 over three years, contributing just 1% of total ad-generated profit."

Globally newspaper print circulation has been up about 5% on a year by year basis between 2012 and 2016. Countries with declining circulation were Japan, USA, Germany, UK, Russia and Brazil, all between a decline of 9 to 19% in four years. On the other side circulation rose in the same period in Malaysia, Mexico, Thailand, Indonesia, China and India. The growth rates were between 2% in Thailand and 71.5% (!) in India.

Even the global print circulation revenue grew at a rate of roughly 1% per annum. Sally Pirri said that The Globe and Mail had its first year of higher circulation revenue compared to advertising revenue recently. The fundamental problem of the international newspaper industry is the steeply falling print advertising revenue, which is not compensated by growing digital revenues.

An important recent industry incident was the announcement of US tariffs on imported newsprint from Canada. Tariffs are company individual and were announced between 4 and more than 20%. This was discussed in the meeting and considered to be a thread especially for the smaller local and regional US newspapers who will have no alternative source to Canadian newsprint since the supply from US mills can hardly satisfy the demand. WAN-IFRA supports the STOPP coalition (Stop Tariffs on Printers & Publishers).

## **7.2 IFRA World Publishing Expo and Digital Content Expo**

IFRA World Publishing Expo and DCX Digital Content Expo will be organised in Berlin again from 9 to 11 October 2018. 96 exhibitors booked 2,792 m<sup>2</sup> so far. Additional target groups in 2018 will be magazines, corporate publishing, content marketing and document management systems.

Three conference stages are planned:

- IFRA Conference Stage – Print and production topics  
Conference sessions and exhibitors' presentations
- DCX Conference Stage – Digital business topics  
Conference sessions and exhibitors' presentations
- DCX Content Stage – New topics: magazines, corporate publishing,  
content marketing, document management

## **7.3 ICQC 2018–2020, Star Club**

The International Color Quality Club competition is just ending the print test phase. It will be concluded by the jury evaluation of the general print quality at begin of May. Results will be published in June and the awarding of new Club members is planned for IFRA Expo.

This year 121 publications or print plants participated, which is a decline of –9 compared to the last edition. When you look at the participation figures of the last four sessions you see a strong

decline in Europe compared to a strong growth in India. Manfred Werfel proposed that the World Printers Forum Board should talk about possibilities to improve the participation in the International Color Quality Club in future at its next meeting in October 2018. WAN-IFRA will suggest an improvement plan to raise the attractiveness of the competition in economically different times for newspaper printers.

#### **7.4 World Printers Forum Conference 2018 and other events**

Publish Asia, the regional WAN-IFRA conference in South East Asia will be organised in Bali this year (24 to 26 April). It offers a session with the title "High-Value Print Production". Speakers will be our Board member Sanat Hazra, Ian Hamilton, Sales Director SEA from UPM, and Manfred Werfel, WAN-IFRA.

After a number of years print will be a topic again at this year's World News Media Congress in Portugal (6 to 8 June). The print session of the congress, "What's New in Print", is planned with the following speakers:

- Eva Fauth, Project Manager, Children Newspaper, VRM, Mainz
- Ulbe Jelluma, Managing Director, Print Power Europe, Brussels
- Abeer Abdalla, PR & Business Development, Al-Jazirah Corporation, Riyadh, Saudi Arabia

The World Printers Forum Conference will again be held in conjunction with WAN-IFRA India Conference in Hyderabad, 25 to 27 September. The program is currently under development.

#### **7.5 Board extension 2017, Board election 2018, electoral procedure**

The WPF Board has recently been extended to 18 members by co-optation. The plan was to introduce from now on an annual re-election of six new members, three from publishers/printers and three from supplier companies.

By begin of 2019 six of 18 Board members would end their second term and would not be re-electable any more.

However, looking closely at the figures, we found that in reality not six, but seven members would end their second term on the Board, three publishers/printers and four suppliers. This would leave us with an odd situation because we would have to re-elect seven members in the first year, five members in the following year and so on.

In order to avoid this odd situation Manfred Werfel proposed to make a one-time exception in the case of Herbert Kaiser, our current vice-chair, representing a supplier company, asking him to stay on for one more year, until begin of 2020.

After a short discussion the WPF Board decided to follow this proposal and also Herbert Kaiser accepted the extension of his term for one year until begin of 2020.

This means the Board now should think about proposals for six new members, three from publishers/printers and three from suppliers. Manfred Werfel asked all participants to propose possible Board members and send the proposals to WAN-IFRA before the summer vacation time.

When discussing the electoral procedure a number of participants raised the question if it makes sense to have formal Board elections at all. As an alternative the Board could nominate new members and co-opt them after they agreed to support the work of the WPF Board.

The participants mutually agreed to organise a WPF Board Telco meeting by mid of the year to discuss the question of new Board members specifically. A prerequisite for this meeting would be to prepare proposals for qualified new Board members. At the meeting we would talk about possible new members and about the procedure to integrate them.

During the discussion participants proposed inviting retailers and magazine printers to future meetings to learn from their experiences. Also, ad agencies should be approached by the World Printers Forum to discuss the power of print and innovative opportunities of print advertising. For example, we could invite ad agencies to a two hours meeting during IFRA Expo.

## **8 Projects in 2018**

### **8.1 OPHAL Paper Guide, printed version, translations**

A second improved edition is currently prepared. This will be available again as a free e-book but also in a printed version: 272-pages case bound, section sewn, printed offset 4-c on 135 g/m<sup>2</sup> PEFC paper. The print run is 1,100; the regular copy price will be € 250. Later, translations into French, German, are possible provided we can find partners that help financing translation work.

### **8.1 Implications of changing to lower grammage newsprint**

This latest report of the World Printers Forum has been published on 7 February 2018. It was promoted by the WPF newsletter and with special mailings. We will also present the report at the annual NOPA meeting in April, at Publish Asia and at the World Printers Forum Conference 2018 as well as at IFRA Expo 2018.

Manfred Werfel thanked the Board members who actively supported the creation of the report with valuable contributions and experience reports.

### **8.2 Effectiveness of the printed newspaper**

Prof. Neil Thurman from LMU Munich provided his "core essay" on 26 February 2018. We developed interview questions for industry experts and send them to all WPF Board members.

The format of the report is pretty much the same as last year's report on the "Print-Online Performance Gap" with Iris Chyi from Austin, Texas:

- Introduction
- Core essay
- Statements from industry experts in form of answers to interview questions

Publishing is planned for June 2018.

Currently we got responses to the interview questions from Rainer Kirschke and Andreas Gierth, Sally Pirri and Iris Chyi announced their responses as well as Max Garrido.

The question was raised: What is the deadline for responding to the interview questions? Manfred Werfel asked to send the answers to the question to WAN-IFRA until mid of April (**Monday, 16 April**). This will allow us to manage translation, proofing, and editing in time, so that we can keep the publishing target date (June).

Participants asked to make the graphs of Neil Thurman available as separate PDFs for the WPF Board members. Please find these documents as attachment No. 05 to the minutes.

### **8.3 Sustainability of the printed newspaper**

The project outline was drafted on 8 December 2017. Meanwhile a co-operation agreement with Two Sides has been reached in January 2018. Timothy Baker is the researcher at Two Sides for this project.

A [survey](#) has been developed and distributed to more than 2,500 experts. 54 responses were returned up to now. The draft report is planned for the middle of May 2018. Publishing of the report is planned for July 2018.

Sanat Hazra stressed the importance of distribution for the sustainability of the newspaper business. Distribution is organised very differently in different regions and economies around the globe.

Anu Ahola and Thomas Isaksen said they both would be willing to contribute to the report on sustainability. However their contributions can't be fit into the structure of the current survey. Manfred Werfel will inform Timothy Baker accordingly and ask him to get in direct contact with Anu Ahola and Thomas Isaksen.

### **8.4 Continuation of High-Value Print Production**

The project outline needs to be developed until end of April. Manfred Werfel has send a first sketch to Herbert Kaiser and will come up with a proposal for the WPF Board.

The basic idea is to have a selection of about 8 practical examples, print plants and publishers, who produce high-value products, and organise in-depth interviews and visits with them. The target is to create rich case studies.

Manfred Werfel asked the participants to provide suggestions for sample cases. Publishing of the report is planned for October 2018.

### **8.5 Mechanical Press Audits**

The project will be developed by WAN-IFRA South Asia. Colleagues in India can start the project after the ICQC evaluation will be finalised in June 2018. The report is to be based on practical experience with consulting and training projects on mechanical press audits in India. Publishing of the report is planned for December 2018.

## 8.6 Milestones in newspaper printing history

Initiators of this project were our former chairman K Balaji and M. Werfel. The project outline was developed in January 2018. A core group of experts was specified in February 2018. Publishing of the report is planned for March 2019.

This project aims to present important business and technical milestones in newspaper history: “What can you learn from often disruptive developments in the past to better master the future of newspaper publishing?”

We would choose a few outstanding developments of the past decades (1970 to now) without aiming for completeness (no printing history book). This is the draft project structure:

- Photo typesetting replacing mechanical typesetting
- Electronic page-make-up, full page output
- The developments of industry standards
- Offset printing replacing letterpress printing
- Four-high tower press design, enabling full colour printing
- Printing substrates and other materials
- From the mailroom to the finishing department

## 8.7 Review newspaper printing standard ISO 12647-3

ISO standards are reviewed regularly every 5 years. This year the review of ISO 12647-3 is planned by ISO Technical Committee 130, which will meet mid of April Berlin.

We are planning to suggest modifications in three areas:

1. Tone value sum: Should not exceed 200% and shall not exceed 220%

2. Grey balance:

Light grey	C 10%	M 08%	Y 08%
Medium grey	C 30%	M 22%	Y 22%
Shadow grey	C 50%	M 42%	Y 42%

3. Sampling method:

We suggest a definition regarding the sampling method for checking the conformity of print runs in ISO 12647-3. For example colour register: Specify on which pages of a newspaper press the colour register has to be measured.

Menno Jansen said he would be willing to provide his input in the area of sampling methods, since his company specialises in this kind of measurements. Manfred Werfel welcomed the input of Menno and asked him to send his recommendations.

## 8.8 New "Innovation in Print (Advertising)" award?

Sanat Hazra and Andreas Gierth came up with the idea to consider a print innovation award of the World Printers Forum to promote the innovative power of print.

Manfred Werfel presented a possible concept for such an award:

It would be a worldwide award (WPF Innovation Award) to create a high attractiveness for possible participants. Application and evaluation could be organised online with an online jury (using the existing Award Force software of WAN-IFRA). Participation fees could be relatively low, e.g. 300 € for non-members, 150 € for members. First awards could be organised for IFRA Expo 2018. We could also create a report that showcases successful innovators and also organise webinars and presentations at WPF Conferences and IFRA Expo.

The award categories should be simple and easy to understand:

- Print advertising innovation, including print-online
- Print product innovation, new or renewed products
- Print business innovation, new business models

Unfortunately, due to time constraints, a deep discussion of this agenda topic was impossible. There was both, sympathy as well as scepticism among participants. The WPF Board should continue the discussion after the meeting using electronic communication (probably the "Basecamp" platform). Manfred Werfel will organise the discussion.

## 9 Next meetings

The WPF General Assembly is planned for

**Thursday, 11 October 2018 (last day of IFRA Expo), 9.30 am to 11.30 am,**  
on the fairground of Messe Berlin, in the same format as last year.

The next WPF Board meeting is planned for

**Friday, 12 October 2018 (day after IFRA Expo), 9 am to 2 pm,** at the Berlin office of

Frankfurter Allgemeine Zeitung (F.A.Z.)  
Mittelstraße 2-4  
10117 Berlin (Mitte)

Since the Berlin F.A.Z. office is located very much in the heart of Berlin, we will plan a walking tour after lunch to the Brandenburg Gate, the Federal Parliament (Reichstag) along the embassies of the leading nations.

Our thanks go to Andreas Gierth for the kind invitation!

Mujo Selimović invited the World Printers Forum Board to Sarajevo for the spring meeting in 2019, which was thankfully accepted by the participants.

**10 Other business**

No other business was discussed due to time constrains.

**11 Concluding remarks**

Herbert Kaiser thanked the participants for their valuable contributions and the productive meeting. He thanked Anu Ahola for her great hospitality. He closed the meeting at 16.15 h.

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Minutes drafted by Manfred Werfel, WPF Secretary, on 2018-04-07.

Minutes approved by Herbert Kaiser, Vice-Chair of the WPF Board, on 2018-04-09.

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The following attachments to the minutes are available on the website of the World Printers Forum:

[2018-03-27 WPF Board Meeting Attachment 01: Slides](#)

[2018-03-27 WPF Board Meeting Attachment 02: Max Garrido](#)

[2018-03-27 WPF Board Meeting Attachment 03: Rainer Kirschke](#)

[2018-03-27 WPF Board Meeting Attachment 04: Gideon Martz](#)

[2018-03-27 WPF Board Meeting Attachment 05: Neil Thurman Graphs](#)