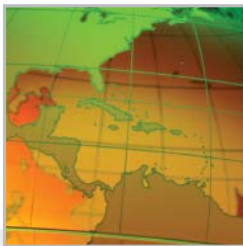


## >>The New Repro: A Study on In-House Production Printing in Europe 2010 & Beyond



### Production Printing & Media



- >> Identify product and market opportunities
- >> Understand how the market is segmented
- >> Learn about the distribution of shops and differences in practices across Europe
- >> Understand the key trends impacting the in-house production printing market
- >> Support strategic planning for products and services
- >> Improve sales and marketing activities in key market segments
- >> Understand the purchasing process and the impact of technology on that process
- >> Identify opportunities in solutions and in value-added document services
- >> Gain a vision of the in-house production market in the future





# In-House Production Printing in Europe

This study aims to provide the necessary market intelligence to develop a clear-cut strategy that brings European in-plants firmly into the next decade and help our clients grow their presence and success in this important market.

## >>Introduction

In a time when rationalising printing costs are on the top of every CFO or COO, the need for professionally managed, highly cost-effective in-plants and CRDs has never been greater. Externally managed print, outsourcing, or managed print services are just a few of the buzz words that have permeated the industry and threaten the raison d'être of in-plants. As the pressure to rationalise print spending continues, corporate reprographic departments are increasingly forced to reinvent themselves and prove they provide value to the organisation. This requires a migration to what we call a new repro: an in-house print centre that is proactively helping the organisation achieve its communication goals, thereby providing a wide range of cost-effective print services based on

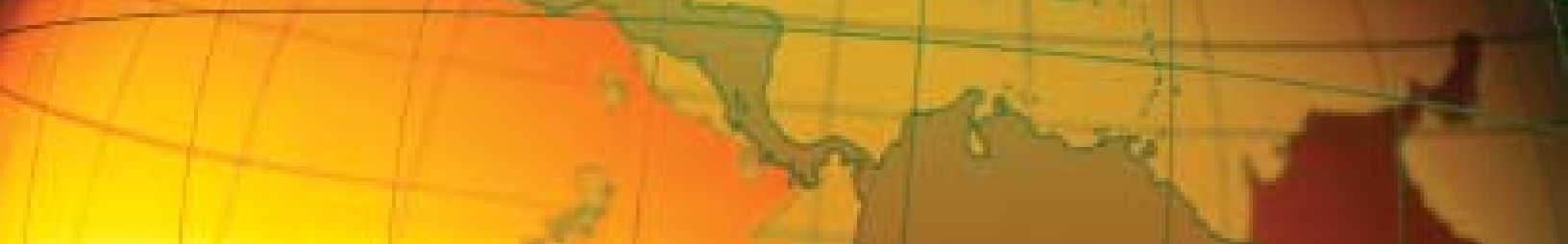
the latest technology. This migration does not happen overnight and requires the help of many stakeholders to provide the right mix of hardware, software, training, and services. This study aims to provide the necessary market intelligence to develop a clear-cut strategy that brings European in-plants firmly into the next decade and help our clients grow their presence and success in this important market.

## >>Definition of In-Plant Printing

InfoTrends uses a consistent methodology in tracking establishments. To provide consistency with other standardised market data sources, our definitions of the industries and establishments are based almost directly on international classification standards.

In-plants, in-house print facilities, or Corporate Reprographic Departments are defined as departments within establishments that are primarily engaged in reproducing text, drawings, plans, books, brochures, presentations, directories, manuals, or other copies by photocopying, offset printing, digital printing, or any other method. The primary business of the establishment is anything but printing or offering print-related services.





## >>Project Objectives

The study provides a complete and fresh view of the current European in-plant market and has the following objectives:

- Define and size the European in-plant market (European Union countries)
- Measure the penetration of installed hardware in use
- Measure the penetration of software tools in use, including Web job submission, variable data, workflow automation, production management and other functions
- Identify product purchasing plans
- Quantify the volume and growth of various print applications and other services
- Explore country differences within Europe
- Explore the difference between documents that are produced on-site versus those produced off site and factors driving the decision
- Gauge the rate of convergence by identifying whether in-plant sites merge with data centre printing sites or take on their responsibilities
- Investigate and understand the operation of sites that are run by facility management firms as well as the drivers to outsource or insource
- Identify the need for business development and training services
- Identify trends around the relationship between in-plant and establishment, especially around the management of performance, cost control, and service levels
- Formulate a vision of the new repro: factors that will impact the in-plant print shop of the future

## >>Who Should Subscribe?

- Print equipment vendors and suppliers offering digital or traditional printing solutions, paper suppliers or distributors, providers of front-end systems, finishing and mailing equipment vendors
- Facilities management and other outsourcing providers in the document services space
- Software solutions providers to the graphic arts and data processing industries
- Executives concerned with trends in internal printing services
- In-plant printing services professionals
- Commercial and quick printers interested in understanding how in-plant printing trends may impact their current and future business potential
- Managers, document owners, and print buyers seeking information on the future of business communications





## >>Previous Research

InfoTrends estimates that there are more than 15,000 in-plants or CRDs in Europe and a far larger number of corporate print and copy sites. When ranking the number of professional print establishments, in-plant printing establishments are only second to commercial printers. Unlike commercial printers, in-plant printing establishments do not have a separate statistical classification and are frequently overlooked by printing associations and other trade sources.

Detailed insights about this market were provided in 2004 when InfoTrends conducted the study 'Corporate Printing Services: The European In-plant Opportunity' and the current study will build on insights from that study to identify areas of progress. Other relevant previous InfoTrends research includes 'In-House Production Printing – Critical Trends', 2009 (US) and the 'European Print On Demand Forecast 2008-2013'.

## >>Market Research

InfoTrends pride itself in offering high-quality research based on proven methodologies. For this research, InfoTrends will conduct an extensive analysis based on the following components:

### **Desk Research**

InfoTrends will define and size the market based through desk research that builds on previous studies, as well as insights gained from government, industry data sources, and own sizing figures. Previous studies, such as the 2004 in-plant study, will allow us to draw conclusions on past developments.

## **Telephone Aided Web Survey**

InfoTrends will conduct telephone-aided web surveys with 300 professionals within the in-plant services sector to assess strategic direction for these operations, including scope, size, organisational trends and strategies, document distribution strategies, hardware installations, software installations, need for services, and future buying plans and other key trends.

## **In-Depth Interviews**

InfoTrends will speak with at least 15 leading in-plants and outsourcing providers to get a more in-depth view of key trends and developments and qualitative trends beyond what can be achieved in a survey.

The research will focus on the 3 major European economies (France, Germany, and UK), plus Italy for a Southern European view. Netherlands has been included to give as smaller country with a highly developed electronic infrastructure.

### Countries surveyed

- Germany
- France
- Italy
- Netherlands
- United Kingdom





## >>Analysis & Project Deliverables

By subscribing to this research, clients will receive the following set of deliverables:

- An executive summary that addresses key issues, findings, and overall conclusions and recommendations
- Written report. This is a detailed (approximately 200 pages) written report, which provides a full description of the research and its findings, and comes with charts, data tables, and analysis.
- Tabulated data is provided to give clients the opportunity to view the complete set of responses, which is useful for own analysis or specific cross tabulations. The tabulated data will be provided in three separate “banners” delivered in both PDF and Excel/CSV format.
- The banner index provides full details on the breakout by question of each of the banners.
- Questionnaire / Frequency reports provide the full questionnaire, as well as top-level information about the number and origin of respondents.
- Presentation in PowerPoint format contains bullet points, pie charts, and bar graphs relevant to the results of the study.

## >>Project Schedule

Survey development will occur in December 2009 to February 2010. The fieldwork for this research is scheduled for February – March 2010. The final results will be delivered by June 2010.

## >>Terms and Conditions

### Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

### Copyrights

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### Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

### Terms

Clients may have other business units co-fund the study, review the questionnaires, and receive a copy of the report at no additional charge. InfoTrends invoices the first half of the fee upon initiation of the contract and the second half upon delivery of the report.





## >>Authorization Form

Don't miss the opportunity to be a part of a research study that will define where the market transition is today, assess what is needed to move it forward, and identify where the profit opportunities reside.

>>Subscribe Today!

### Technology Providers

Primary business is printing equipment manufacturer, software and system vendor, paper manufacturers, and equipment and supplies distributors or providers of facility management/outsourcing services.

Full report	19,995 euro
Country report	7,995 euro

### Corporate, Government, Education, or Non-Profit end-users:

Full report	11,995 euro
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Email the completed form to [sales@infotrends.com](mailto:sales@infotrends.com) or fax to +1 781.616.2121.





production printing & media



InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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