The Print Industry Fights Back

The story of Ireland's Print & Packaging Forum
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Through their hard work and dedication, they have shown how a partnership approach can be deployed to help tackle the serious challenges facing an entire economic sector. We wish them well in their ongoing endeavours to build a productive, competitive and high-quality print and packaging industry in Ireland.

It is often said that innovation increases in times of crises, and the Forum stands testament to this observation. In these exceptionally difficult times, it is to be hoped that other sectors facing similar challenges to those in printing and packaging will be able to draw on the Forum’s example and experiences, and to develop innovative and creative responses to the current downturn in a collaborative and participative manner.

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Summary

A 'model of social partnership at work'

The Print & Packaging Forum was established in 2004 to address the serious competitive problems facing the printing industry in Ireland. It is believed to be the first example of a sector-wide partnership initiative in the Irish private sector encompassing all of the main stakeholders: employers, trade unions, state bodies and educational institutions. It arose from the recognition by key figures in the industry that something had to be done to ensure that printing in Ireland did not go the same way as other traditional sectors such as the textile industry.

Since its inception, the Forum has generated a number of mutual-gains outcomes through joint problem-solving, most notably a radical redesigning and modernising of the apprenticeship system. In this regard, the Forum has consolidated all four of the previously separate printing-related trades into one, clearly identifiable apprenticeship course, called the 'Print Media Technician' programme. In terms of industrial relations, although the Forum does not address specific, company-level IR issues (focusing instead on broader industry-wide strategic issues), its work appears to have had a positive spin-off effect by enhancing trust between the key stakeholders.

The Forum faces a number of significant challenges in the short to medium term. These include persuading management and union ‘traditionalists’ to embrace change; improving education and training across the industry and right up to senior management level; marketing the industry more effectively and lobbying Government for a level playing field on public procurement and tendering issues.
Es waren zwei Tage — diebe gewesen, die weiß woher kamen, Knoten in die Bäume machten und die Leitungsanschlüsse vertauschten, so daß aus den Steckdosen plötzlich Wasser rieselte.
Introduction

The advent of the Print & Packaging Forum represents arguably the first time in the Irish private sector that representatives from the main interest groups – employers, trade unions, semi-state bodies and educational institutions – have come together on a quadripartite basis to attempt to resolve jointly the challenges facing a specific sector of the economy. As such, it represents an innovative and practical example of mutual-gains partnership at sectoral level, and may provide insights for other industries experiencing similar competitive challenges.

The Forum is the brainchild of Gerry Andrews, a former president of the Irish Printing Federation (IPF), a sectoral body within the Irish Business and Employers’ Confederation (IBEC). The background to its establishment was an industry that was severely divided, with little unity of purpose, co-ordination of activities or strategic direction. Furthermore, the number of apprentices entering the printing trades at that time stood at an all-time low.

The Forum was therefore established as a sectoral strategic initiative to confront the main challenges facing the industry, including:

- heightened competition from overseas companies
- significant deficiencies in managerial and technical skills
- a traditional command-and-control management culture
- adversarial industrial relations
- excess capacity
- over-reliance on domestic markets

In the words of Gerry Andrews, “The Forum is about the sector fighting back… to ensure the Irish printing industry does not go the same way as our textile industry.”
Des Geraghty, a former president of SIPTU and now independent Chairman of the Forum, echoes these sentiments. “I took the view that the sector could go the way of the textile industry, that it could actually be wiped out. I was anxious that we develop a high level of co-operation and partnership between the main players. There were a lot of historic barriers to be overcome.”

Other key figures on the trade-union side also recognised the need for change, especially when faced with a rising tide of competitive pressures and new technologies. Shane McKean of the Irish Print Group within SIPTU cites the example of Independent Newspapers, where he was formerly Father of the Chapel. “It was recognised by union representatives in the Indo that rather than just wait for management to introduce new technologies, they should approach management to discuss it, as opposed to what happened in the UK, where unions buried their heads in the sand and allowed management to come along and hack them.”

According to McKean: “When the Forum was first mooted, the unions could see what was happening in the trade – threats from China, Eastern Europe, India and so on. There was a clear understanding that outsourcing had had a detrimental impact on the industry generally. We had witnessed the loss of hundreds of jobs – eighteen printing houses had closed down in the greater Dublin area in the previous eight years alone. We had a choice: we could live in a vacuum or open it up.”

In essence, the Forum was established to ensure the very survival of the Irish printing industry.

Print Irish: A call to arms

The Forum has developed a new brand identity (left) for the Irish printing industry.

Due to be launched in Spring 2009, all Irish printing firms will be encouraged to use the new logo as a means of demonstrating the quality and capabilities of our indigenous Irish printing industry.

The logo will be used to build industry awareness and to unite the printing industry under a common flag.

The Forum intends to market the Irish printing industry extensively in the coming months under the new brand, and ambitious plans are currently being drawn up in this regard.
Industry profile

The Irish printing industry currently employs some 17,000 people across 750 companies throughout the State. Traditionally, it has been a highly fragmented sector with each individual company tending, until recently, to operate and exist in isolation. The majority of these companies are small firms, and average per-company employment across the sector is around 45 people. Almost half of those employed are general operatives while one-third are support staff and just over one-in-five are skilled craftspersons.

Historically, industrial relations have tended to be adversarial in nature. In a sector that was traditionally highly unionised, union density has declined somewhat in recent years, mainly as a result of job losses in traditional printing houses and the advent of new, non-union employments. This is reflected in membership of the Irish Print Group (IPG), an autonomous branch of SIPTU, which fell from 2,700 in 1998 to around 1,800 in 2008. In terms of trade-union structures, there are now just two main unions in the sector following recent merger activity: the IPG and Unite-Amicus. There is also a registered employment agreement (REA) setting out minimum pay and conditions in the greater Dublin region and the unions are keen to see it extended to the rest of the country.

On the employers’ side, the Irish Print Federation (IPF) represents some firms in the sector, as does the Regional Newspapers Association of Ireland (RNAI).

The vast majority of printing companies in Ireland are private, indigenous and Irish-owned. Many firms are run by owner/managers, many of whom come from a craft or technical background and tend to have little or no formal management training. Indeed, there is a view within the Forum that ‘weak’ management in some, but not all, instances has had a negative impact on the strategic direction and performance of the industry.
This was reflected in a 2005 report entitled ‘A Developing Future: A Study of the Paper, Print and Packaging Industry’, compiled by FAS and Enterprise Ireland.

In financial terms, the industry’s total turnover in 2005 was €2.6 billion, with annual exports of €333 million. The sector relies heavily on the domestic market for most of its revenues, which is reflected by the fact that the aforementioned level of exports is among the lowest of all industrial sectors in Ireland. However, the emergence of low-cost producers in Eastern Europe, as well as in India and China, has raised serious doubts about the viability of this traditional competitive strategy.

According to Gerry Andrews, the only differentiation that exists at the moment between many print firms is price. However, he views it as ‘flawed’ to solely focus on price competitiveness, and does not subscribe to the belief that wages are the only reason Irish firms are losing out to foreign suppliers. He believes the spotlight should be trained on other factors, in particular improved resource management (i.e. people, technology and production processes) and the development of value-added services.

There has been a notable change in the skills profile of the printing trades in recent years. Numbers employed have declined by more than 25% in the sector since 2000, and there has been a significant reduction in the numbers entering traditional, craft-based printing apprenticeships. Technical and computer-related skills are becoming increasingly important across the sector, as new technologies enter the marketplace.

There are deemed to be significant skills deficits, largely because education and training provision has not kept pace with technological advances, reflecting a historical legacy geared towards male, manual, production-related mechanical skills under the traditional craft-apprenticeship system. In this regard, the gender balance has recently started to shift, with increasing numbers of women entering the industry. For these reasons, reform of training and education has become a vital issue.
Another key issue for the Forum is the interpretation in Ireland of EU public procurement rules, and the impact this has on the tendering process for printing contracts here. There is a widespread belief across the printing industry that Irish government officials tend to interpret procurement regulations in a far stricter manner than their counterparts elsewhere in Europe. As a result, there is a strong conviction that Irish firms are losing out on Government printing contracts, and that the playing field is not nearly as level as it should be.

**Forum Structure and Composition**

The structure and composition of the Forum is as follows:

The independent Chairman is Des Geraghty, prominent trade unionist and former member of the European Parliament. Having such a high-profile chair, with many years’ experience of industrial relations issues, gives the Forum considerable lobbying clout.

Gerry Andrews, the Forum’s founder, is also its Director, while Terry Cummins of IBEC acts as Forum Secretary.

Membership is comprised of employer representatives from the IPF and the RNAI, including Lorcan Ó hÓbain, Johnny O’Hanlon and Warren Turner. Packaging sector employers are represented by Bobby O’Connor and David Little.

On the union side, employees are represented by Shane McKean and John Whyte of the Irish Print Group (IPG), an affiliate of SIPTU. Brendan Byrne of Unite and Fergus Farrell, formerly of Amicus, also serve as Forum members.

John O’Connor, Kevin Byrne and Vincent O’Leary (Dublin Institute of Technology), Orla Flynn and Peter Dennehy (Cork Institute of Technology), and Anne Morrissey (Dublin City University) represent educational institutions involved in the provision of vocational training to the printing industry.

FÁS (Chris Feeney) and Enterprise Ireland (Kevin Kavanagh and Breege Kennedy) are also represented on the Forum, as is Repak, the Government/industry-sponsored recycling body (Colm Munnelly).

The Forum meets in formal session between eight and ten times per year.

Its first objective was to build representation at national level. Having successfully achieved this, its next goal is to replicate the national structure on a regional basis, resources permitting. To kick-start this regionalisation, it is envisaged that a Munster branch of the Forum will be launched in the near future.
Die Minuten fand er an die Haltestellen, dort verloren die Menschen immer ein wenig Zeit, und schließlich mußte er sogar hinter den Sekunden her sein.
The Forum and ‘A Developing Future’

The ‘A Developing Future’ report (2005) contains a number of inter-related conclusions and recommendations under four distinct headings – human resources, marketing, attitudes and efficiency – which the Forum has undertaken to address.

In the area of human resources, for instance, the report noted that the industry “does not possess the key human-resource competences to compete successfully,” and recommended that action should be taken to initiate a fundamental review of the existing training portfolio in the sector, and to press ahead with reform of the apprenticeship system. As for marketing, the report concluded that the industry “lacks a customer focus and it is not sufficiently engaged in exploiting marketing opportunities in Ireland or overseas.” To this end, it proposed that the Forum should design a comprehensive marketing strategy for the industry. The report also suggested that FÁS and Enterprise Ireland should synchronise their various forms of assistance to minimise duplication and prevent any waste of resources. On the issue of efficiency, the report concluded that, although some firms operate to best-practice standards and are trading successfully, many companies are struggling to survive, remain uncompetitive and are not actively exploiting ongoing technological developments. To address this deficiency, proposals included visits to state-of-the-art printing and packaging plants to learn from modern best practice, such as computer-based workflow systems. Finally, on attitudes, the report pointed to weaknesses in the attitude of management relating to the absence of good governance and a lack of appreciation of the value of strategic planning. To rectify this, recommendations include the promotion of training in strategic planning for owners and managers.
Sector-level partnership in practice: Fostering trust and positive industrial relations

Since ‘A Developing Future’ was published, the Forum has started to address some of its key recommendations and has already secured a number of mutual-gains outcomes, most notably a radical re-designing of the old apprenticeship programme.

The Forum’s main purpose is to bring participants into a single, unified structure in order to form a united front to address issues of importance to the printing sector in a broad context, leaving any industrial relations ‘baggage’ outside the door. Initially, there was some suspicion from the unions about the Forum and the intentions of the employers’ side. Shane McKean remarks: “The unions clearly indicated to employers early on that if it was just a case of getting rid of the apprenticeship system, for example, our members would not be co-operating or training people on the floor.”

The Forum was viewed as an opportunity to start focusing on ‘the big picture’. Relationships quickly started to improve, and there was evidence of a move away from the traditional adversarial battleground between unions and employers. What transpired, Gerry Andrews suggests, was greater mutual understanding of the other side’s respective positions. “We can agree to differ on certain subjects, and form opinions and strategies that make sense, as a result of the dialogue that’s taking place in the Forum. There are still differences, of course, but from a more mature perspective than in the past. We are now all committed to looking at the bigger picture and agreeing in a more structured way on areas of mutual interest.”
Andrews is of the opinion that this filters down into the rest of the industry. If the sector’s leaders can agree on overall strategy, this is reflected at the level of the workplace. Much depends, however, on the individual company. The Forum agrees an overall approach to a particular issue, but application at enterprise level comes down to dialogue between employers and unions in the individual companies. As a result, there now appears to be greater appetite for a new way of doing things among individual companies.

In terms of industrial relations, employers and unions come together in the Forum to consider issues of strategic importance to the sector. All local IR issues are left out of its discussions. A distinction is thus made between local disputes, on one hand, and engaging in problem-solving on the big, strategic industrial relations issues, on the other. Where local IR issues exist, they are dealt with in isolation by the respective unions and employers. Thus the Forum focuses on promoting open dialogue in terms of overall strategy for the industry.

One sector-wide IR issue that has been examined by the Forum is the breaking down of traditional job demarcation. The entrenched nature of demarcation was perceived to constitute a serious competitiveness issue, and the Forum set about using collaborative problem-solving techniques to alter the status quo.

Since ‘A Developing Future’, there appears to have been a reduction in traditional job demarcations and greater evidence of new forms of work organisation. But this is certainly not the case across the whole of the industry, with the continued presence of pockets of ‘old-school’ management and workers still concerned with defending the traditional status quo. As a result, a wide range of work structures remain in evidence across the industry. Some firms have relatively high levels of flexible working, inter-changeability and multi-skilling in place. Elsewhere, work organisation is less flexible, and sometimes not as practical or as feasible as in some of the larger enterprises. In short, there is no ‘one-size-fits-all’ approach.
On job demarcation, Des Geraghty observes: “There is still sensitivity from traditionalists, a desire to defend demarcation. We shouldn’t get tied up with demarcation. We want good jobs. I have a view that unions are at their best when leading the change process, and at their worst when resisting it... sticking rigidly to demarcation and so on. Unions need to lead change.”

Meanwhile, Gerry Andrews suggests that much depends on individual managers. He sees work organisation as a management issue and a resource issue. It is thus down to the competence of management to maximise resources. He believes there is evidence to show that flexible working has increased, which he says is a direct consequence of the work of the Forum. He concedes, however, that there is “a mixed bag out there,” and that the Forum is concerned about the work practices of a handful of companies where there appears to be a degree of exploitation of some workers. “You are always going to get maverick organisations,” he says. “No one would subscribe to a model where employees are being exploited, but nor would we subscribe to one where employers and management are being intimidated. Both are wrong. There are instances at the extremes where both apply, but thankfully they are few and far between.”

Although the Forum does not concern itself with company-level IR issues, its work does appear to have had the spin-off effect of improving trust and fostering ‘better’ industrial relations across a broader canvas, as noted by Des Geraghty. “I made one thing clear when I came in. I was not doing anything in the IR area. I’d done that for 35 years. I didn’t want to be drawn into conflicts of that nature. However, I think that the existence of the Forum is about building trust. It brings trust back into the IR arena, so relationships are good between the people involved. At the end of the day, the Forum’s main concern is with training, development and education... that’s its core focus. But I think it has also helped IR in a general sense.”
Joint problem solving

All in all, union representatives are deemed to have a relatively high level of influence in the Forum, extending to a degree of joint decision-making over operational and strategic issues facing the industry. Indeed, there is a view in some quarters that the unions have largely the same influence as employers. Shane McKean thinks the Forum has been “very positive” in terms of the representational role of unions. “I would say we have a joint role in that we would see the Forum as a partnership... and employers are honouring it. We see the union role as equal, as important as employers. We don’t have huge disagreements, and if we do, we solve them. IR is left outside the door.”

Similarly, Gerry Andrews insists the Forum is not simply a management creation nor just about peddling a management agenda, pointing to the appointment of a former SIPTU president as chairman. Des Geraghty himself remarks: “It is a union-management collaboration that is working. The unions are respected, and there is a common understanding of the issues.”

Informality plays a crucial role in the ‘behind the scenes’ activities of the Forum. Gerry Andrews puts it thus: “It doesn’t all take place at Forum meetings. That wouldn’t be progress, and it wouldn’t be appropriate because it would be putting people on the spot. People take positions if put on the spot and then they feel compelled to defend those positions. That is not a very good platform for real problem-solving”.

The Forum is thus characterised by a large number of side meetings and sub-committees dealing with issues relating to education/training and technology. The Forum meets formally every five to six weeks, but the amount of dialogue that goes on between these meetings is significant.

Gerry Andrews also emphasises the importance of keeping emotions in check. “If emotion enters into the debate, common sense goes out the window. We don’t want emotive debates to take place at Forum level because you end up with chaos. We keep coming back to the national focus. What is right for the sector? What is the big picture?”
A partnership-based apprenticeship model

Unions and employers both point to a concrete example of mutual-gains partnership in practice: the new, radically re-designed printing apprenticeship system now in place. A great deal of dialogue took place between all the interest groups involved in the revised scheme, which was rolled out in January 2006. It is widely acknowledged to represent a practical case of unions and employers reaching consensus in an area of great historical hostility – job demarcation and inter-changeability of workers. But for the existence of the Forum, it could be argued, employers and unions would still be engaged in battles over demarcation, and possibly bemoaning the final demise of the apprenticeship system as a result.

Shane McKean observes that agreeing changes to the traditional apprenticeship system was “a huge, huge decision for unions... to bring members along with that new way of thinking. We could have said to employers: ‘No, what we have, we hold’. Instead, we asked employers ‘What are your needs within the industry?’ We assessed them and we got involved in setting up the new apprenticeship curriculum. It doesn’t mean we are doing away with the traditions and history of the industry.” From a union perspective, the apprenticeship should remain the bedrock of training, and should not be eroded by the increased availability of alternative training – for instance, through Skillnets and various lifelong-learning programmes.

The old apprenticeship system reflected the fact that the printing industry was a very traditional sector, slow to change its work practices and populated by unions that strongly defended individual roles.

Indeed, battle lines were traditionally drawn over such job demarcations. Historically, the sector was comprised of four specific trades: book-binding, pre-press, printing and carton-makers, each of which was treated separately for the purposes of apprenticeships.
However, employers were increasingly of the view that the old apprenticeship system simply wasn’t appropriate for modern industry, having failed to reflect or take stock of ongoing technological developments. At the same time, student intake into the system was dropping dramatically. Consequently, FÁS decided that demand for apprenticeships from industry was no longer sufficient to justify continued investment, and educational institutions (such as DIT) took the view that they could no longer offer programmes that were neither supported by industry nor funded by the State training authority. As a result, there was a very real danger that the print apprenticeship was on the verge of extinction.

The Forum set about redesigning the system to make it more palatable to the needs of modern industry. It consolidated all four previously separate trades into one clearly identifiable course, called the Print Media Technician programme. The length of the course was reduced from four years to three.

The re-designed apprenticeship has removed traditional barriers across the four trades. Apprentices are now trained in all four trades, to ensure they are more in tune with technological advancements and to expand their employment opportunities.

In contrast to the old scheme, apprentices now spend a year at technical college, learning the essential skills of the printing industry. They spend the second and third years with an employer. In conjunction with this, progress is being made on developing a degree course (BA) in Print Media Technology Management, which will facilitate apprentices wishing to advance to third-level education.

In redesigning the apprenticeship programme, the Forum worked closely with FÁS to develop a new curriculum. This meant that the new programme was more responsive to the modern needs of employers, because industry was directly involved, and it also reduced the time and resources spent by FÁS on the curriculum.
Under the new programme, DIT now delivers the education to apprentices, FÁS funds the scheme, and the printing industry, as the end-user or ‘customer’, has greater input in specifying its specific training requirements, monitoring the programme and providing feedback. The Forum has thus helped to greatly improve the linkages between the various interest groups.

Those involved in the development of the new system say that, although the various interest groups – FÁS, employers, unions, DIT – still reserve judgement to some extent, the reality is that the new scheme is already in its third year of existence and has experienced year-on-year growth in the number of registered apprentices. Indeed, the class of 2009 represents the greatest intake of apprentices into a single DIT course in more than 10 years. There is a belief that confidence in the work of the Forum will be built rapidly once it is has been seen to have recorded such ‘big wins’.

Applauding the development of the new system, the director of the Irish Printing Federation (IPF), IBEC’s Terry Cummins remarks: “This good work has resulted in the largest apprenticeship intake into the trade in over 10 years, giving it the highest percentage increase in apprenticeship numbers of any craft designation in the country.”

Gerry Andrews makes special mention of FÁS’s role in supporting the Forum’s activities. “It is no exaggeration for me to say that, without the support of FÁS in particular, the Forum would not be in business.”

Insofar as employer-union agreement on the new apprenticeship scheme has resulted directly in the effective reform of outmoded structures, it is agreed by all involved that the Forum has contributed significantly to the erosion of barriers that had existed for over one hundred years.
Education and training – at all levels

The Forum is also engaged in a number of additional ongoing initiatives, many of them in the area of ongoing education and training education, based on the clear view that new and different skill sets are required in an industry that is evolving and changing all the time. The Forum intends to continue to challenge traditional mindsets on training provision: namely, the view taken by a significant number of managers and chief executives that training is a cost rather than a long-term investment. The Forum’s position is that if CEOs continue to see training as a bottom-line cost, there will be fewer training and career opportunities for people in the industry.

Future management and leadership training is a particularly important issue for the Forum. A consensus exists that, because the majority of owner-managers in the print industry have had little exposure to modern management techniques, training right up to CEO level is required, particularly in relation to issues such as strategic and resource management, including people management and communications.

Shane McKean remarks: “I think management training in this country is abysmal. If you speak to lads on the factory floor about how management address them and how they are given instructions to carry out work, many managers obviously have very poor communication skills. It is about dignity and respect at work. There is still a lot of command-and-control, instead of bringing people on through coaching, nurturing and mentoring. It’s all about communication. As I have said on many occasions in the Forum, management training is a very important element in developing our people.”
More generally, the Forum aims to develop an attractive career path for those entering the printing industry, and to bolster recruitment and retention along a career ‘escalator’ comprising:

**Apprenticeship → Diploma → Undergraduate Degree → Masters in Print Management**

It has been proposed to FÁS that the Forum would assume overall responsibility for co-ordinating and delivering training requirements for the sector. At present, FÁS, Enterprise Ireland and Skillnets are all involved in the provision of training. If it were to be awarded the training contract, which must be put out to tender in accordance with public procurement rules, the Forum intends to independently co-ordinate the activities of all three bodies in order to remove overlaps and duplication of resources. Training programmes would also be developed in consultation with industry players to ensure future content reflected the skills requirements of employers.
Public procurement – an ongoing concern

The Forum is also examining issues relating to the interpretation of EU public procurement rules as they impact on Government printing contracts in Ireland. Both Shane McKean and Gerry Andrews are of the view that Irish public servants adhere particularly strictly to these rules, while the majority of their counterparts in the rest of the EU tend to adopt a more flexible stance that invariably favours local service providers over foreign competitors. The Forum is seriously concerned that such a divergent interpretation of the regulations has put the Irish printing industry at a serious disadvantage in terms of bidding for contracts, both at home and abroad. As a result, it is calling on the Irish Government to ensure as level a playing field as possible in the awarding of public printing contracts, regardless of country of origin.

However, as Shane McKean acknowledges, this is not necessarily the only reason that Irish print firms are not winning more contracts in Europe: “We also have to look at our own issues. Maybe our customer relations are letting us down. Instead of just telling the Government that their application of the rules is wrong, we need to bring them along with us on this.”

In recent months, the Forum has been very active in lobbying Government on this issue. In addition to engaging in discussions at the highest levels within Cabinet, the Forum has also appeared before the Oireachtas Joint Committee on Trade, Enterprise and Employment to highlight the difficulties facing Irish SMEs in tendering for public procurement contracts.

It has also generated significant media coverage of its position in relation to the interpretative anomalies described above.

Confidence is high that the Forum’s voice has been heard on this matter and that policy changes are imminent.

The Forum has also been to the forefront of a parallel campaign to tighten VAT regulations, by ensuring that VAT-exempt bodies declare their tax liabilities on goods imported from outside the State as they are obliged to do by law.
the print industry fights back sector-level partnership in practice
Looking to the future

The Print & Packaging Forum faces significant challenges in the years ahead, notably in relation to education and training, public procurement, marketing, working collaboratively to boost competitiveness in the industry, and bringing along the so-called ‘traditionalists’ in both the management and union camps.

In spite of such a formidable agenda, however, the Forum’s members remain confident that this ‘trust-building partnership’ is well placed to tackle these issues, not just for the benefit of its key stakeholders, but for the future of the Irish print and packaging industry as a whole.