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Project Proposal

From the home of the world's largest inkjet cluster

Cambridge Investment Research Ltd

Digital Printing 2009 Beyond the Technology Enablers Prospects for Presses

Reporting to you with key market insights, a new unique report project by Justin Hayward, in association with advisor Mike Willis (Pivotal Resources)

Who for: CEO; Director of Sales; Director of Marketing; Business Development Director; Portfolio Director, and those involved in marketing, supply chain management, technology roadmapping strategy at digital printing systems suppliers, print-head manufacturers, ink formulators and manufacturers

Who by: Justin Hayward, Director CIR Ltd (author Global Industrial Inkjet Printing 2004 & Inkjet Inks for Packaging 2006; printing strategy consulting; former analyst; PhD in physics); in association with Mike Willis (Pivotal Resources, a founder of Xaar, IMI European Printing Conferences & "Directions" digital printing patent analysis) and Steve Temple (founder and former Director of Technology at Xaar; Printing Consultant and Technology Developer).

Who is researched/case studied: European¹ print service providers, converters, finishers - buyers, end-users of printing systems in Europe, in key segment(s) for digital printing

Project One

Labelling

Project Two

Commercial Printing

When are the projects taking place: end 2008/early 2009

What are the project benefits:

- Focuses on buying decisions to enable your strategy
- Takes you beyond, the technology enablers as you market printing presses
- Updates you on market structure, trends, sizing, growth, key niches
- Complete customer business decision tool in ROI model vs their acceptable ROI
- Goes beyond total cost of ownership economics and ROI
- Purpose of print, new business models: digital futures
- Helps project partners to firm up their approach to target market development
- Enables digital ink, media and hardware suppliers to plan for future
- Takes in new information accessed at leading 2008 trade shows
- Personalised presentation workshop at your offices where possible
- Keeps use of management time low, but communicates results clearly
- Low total cost per project (please enquire +441223303500 for cost as partner OEM (or click for **off-the-shelf**))

¹ Our proxy for "Europe" will be interviews in UK, France/Benelux, Germany/Austria/Switzerland, Italy/Spain, Scandinavia, 5 subregions in total.



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Project Structure & Deliverables

- Research of markets, technologies, economics and buyers; Deskwork plus Interviews
- Written report with executive summary;
- Workshop for participant companies;

Background

2008 was a year of opportunity for digital printing. There is a glut of 'shallow' reports in the printing sector. We shall summarise quantitative market growth forecasts. But there is a gap in the market for readable, clear, in-depth sales and marketing structure information. Such information will provide a new perspective, highly-actionable material for participants. When can digital be used from a technical and economic perspective as of now? What is the 'psychology' underpinning the process of change to digital from analogue? If the technical and economic performance is right, as we'll determine in the Total Cost of Ownership / ROI models presented, why won't people take up digital systems? These questions though important, are generally left unmentioned, or at least unexplored. Do we understand the performance, economics *and* decision-making of digital within the broad context of the entire *business unit*, and the interests of *individuals* in the corporate environment, who are responsible for changing over to digital? Putting this together may reveal more about why some companies will not make the investment in a printing system. It may take us beyond the technology enablers.

Premise

- Potential buyers and users of digital printing systems don't have enough information and understanding to know that digital printing may be good for them. Those that do, may be inhibited.

Aim

- The report forms the basis of a valuable marketing strategy to suppliers of digital systems. Explain remaining barriers to adoption of digital printing systems, which will benefit printing system, printhead and ink suppliers responsible for tactical marketing and selling.
- Write report, an authoritative, independently-produced body of mainly primary market knowledge.
- Take on board issues around organisational and individual behaviour, and management practice. How do individuals with responsibility for buying and running the printing systems think and act? Under what conditions do they work?
- We hope that with your early support, this will become *the* private industry reference on these issues.



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Notes

Independence: We know that in writing these reports, we are offering information to people who work day-in day-out on the same problems, and who may have teams internally to cover some of these issues. But the markets are new and emerging quickly. We hope that we add an independent, complementary eye to your and your internal teams' knowledge; we hope we will confirm many viewpoints or assumptions. If we uncover some new contacts, niches, trends or make clarifications, then we hope the project already has returns.

Minimal use of your management time: This project, once agreed, should not take up a more of your management time than you'd like. It is an investment in better market knowledge towards the end of 2008.

Duration: Project began April 2009 (end 2008/early 2009); it runs for 9 months.

Terms: Please pay 50% of the project value at sign-up, and the rest with the final report and/or presentation, or online if bought at *off-the-shelf* stage.

Privacy: Participants need not let others know that they are taking part or supply contacts.

Single-Client Projects: Participants can commission a single-client project instead of the above syndicated one.