

City Fringe Partnership

Printing and Publishing

Sector Investment Plan 2005–2008

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Printing and Publishing Sector Investment Plan 2005–2008

Introduction

The Printing and Publishing Sector Investment Plan (PPSIP) is a route map for the industry in the City Fringe area.

In line with the City Fringe Partnership's (CFP) general approach to policy and decision-making, it is based on sound evidence – in this case, an analysis and assessment of the sector's needs¹. It sets out the interventions, actions and resources required from both the private and public sectors to sustain, develop and grow the industry in the area.

Also in line with the CFP's general approach, the PPSIP is the product of a truly participative and collaborative process between the private and public sectors, working together through the Printing and Publishing Cluster Action Group (PPCAG). The PPCAG has been industry-led at all stages, using the knowledge and motivation of business people and entrepreneurs whose role is to advise on the industry's current and future development needs.

Public partners in the PPCAG have then enabled the industry to articulate its concerns and aspirations, and pulled these together in the context of public objectives and support, bearing in mind the full regenerative impact – economic, social and environmental. The result is a public/private partnership where all parties stand to gain, working towards a common goal.

The PPSIP provides the strategic framework for defining services that will maintain the competitive advantage of the sector locally and position businesses to take advantage of new opportunities, such as the hosting of the 2012 Olympic Games in London.

It also puts in place the building blocks for the long-term future of the industry, which will:

- ensure a legacy of skills in the workforce;
- improve the profile of the sector as a career choice for young people;
- enhance business development and innovation; and
- contribute to the economic and social fabric of the area.

The PPSIP's outcomes constitute a practical plan of action and activities to provide a clear direction and rationale for the development and delivery of the interventions outlined. In this way, it can be used to negotiate funding and to secure support.

It is also a living document, requiring ongoing engagement, leadership and commitment from the industry and its partners if it is to be realised.

¹ *Understanding the Print and Publishing Sectors in the City Fringe*, City Fringe Partnership, 2004 (Burns Owen Partnership)

Specifically, the PPSIP:

- gives a brief overview of the sector at national and regional levels;
- gives the local context, including details of industry engagement;
- demonstrates clear links to agreed existing strategies;
- presents an overall vision of where all stakeholders want the sector to be in five years' time;
- identifies roles, responsibilities and resources for taking action forward;
- identifies sources of funding and the priorities to which they contribute; and
- presents an outline of the process for monitoring and assessing progress.

As the PPCAG becomes better established, the organic nature of the PPSIP will also enable it to:

- give an analysis of the resources already in place and the gaps that need to be filled; and
- identify planned future investment over a three to five year period.

Background

The national picture

The DTI-funded *Print 21: Coming of Age* was specifically commissioned to report on the competitiveness of the UK printing industry.

It estimated the total employment in the industry in 1997 at 189,200 and noted that the industry is unusual in that it employs substantial numbers of people in all areas of the UK. The total paper, printing and publishing industry represented 3.5 per cent of Gross Domestic Product (GDP) turnover.

Significantly, the report also advised that the average firm size in the UK industry was smaller than in other countries and that the percentage output from these smaller firms was higher than the larger firms.

The report found that the key changes impacting on the sector over the last decade include:

- decreased demand for hard copy;
- technical transition from analogue to digital techniques, leading to a need for investment in new technologies;
- increasing overseas competition from low-cost locations;
- increasing need for skilled labour in addition to school leavers; and
- increasing environmental regulations.

And it recommended key actions to increase the competitiveness of the industry, including:

- strengthening industry benchmarking;
- increasing industry awareness of e-business;
- enhancing the strategic abilities and innovation of industry managers;

- providing more information on printing career routes;
- improving opportunities for women and people from minority ethnic groups;
- raising college and university students' awareness of printing careers;
- reducing environmental impacts through cost-effective initiatives; and
- raising awareness of the importance of print-related clusters.

The regional picture

In 2005, the London Production Industries Commission (LPIC) reported on the vital contribution of the printing and publishing sector. It found that manufacturing output in London totals some £14 billion and accounts for just over eight per cent of the regional economy. Up to 33 per cent of London's manufacturing output is in printing and publishing (28 per cent of the national total).

In terms of employment in London, manufacturing accounts for around six per cent of the total, with 235,000 employees and a further 35,000 self-employed people – of that, printing and publishing accounts for 36 per cent. As such, manufacturing employment in London has a greater concentration in one sector (i.e. printing and publishing) than is the case in any other region.

All of London's manufacturing sectors have lost jobs over the past two decades. The largest losses have been in engineering with 100,000 fewer jobs, followed by ICT and electronics (74,000 losses) and textiles, clothing and furnishings (59,000 losses). Printing and publishing is the best enduring sector, losing just 11,000 jobs since 1982 due to steady growth through the 1990s, largely in publishing.

Significantly, the LPIC also highlighted that while the manufacturing base has contracted in overall terms, it is becoming far more productive in its use of labour – in the last two decades, labour productivity has increased by around 120 per cent. Printing and publishing output in particular is estimated to be 30 per cent ahead of the UK average and operating at a similar level of productivity to leading overseas competitors. This fact is borne out by the SWOT analysis conducted for the national report *Print 21 – Coming of Age* described above.

The local context

The City Fringe has historically been an important location for the printing and publishing sector, largely due to its proximity to key markets such as the City of London.

The CFP's 2002 Business Audit revealed that the sector was still strongly represented in the Fringe, which led the Partnership to commission research into the nature of the industry in the area and the challenges it faced².

The main elements of the research consisted of a quantitative telephone survey of 131 businesses (50:50 split between print and publishing), a series of qualitative interviews with businesses and trade bodies in both print and publishing, and a number of short interviews with buyers of printed items drawn from a diverse range of sectors (other than publishing).

² *Understanding the Print and Publishing Sectors in the City Fringe*, City Fringe Partnership, 2004 (Burns Owen Partnership)

The context for the study was provided by a review of literature at the national level and secondary data analysis of the sector across the City Fringe boroughs, regional and national level. The research was overseen by an intelligence group comprising printing and publishing sector representative agencies and other key stakeholders.

The CFP report identified that:

- publishing in the City Fringe accounts for 40 per cent of London’s total employment in this sector;
- printing in the City Fringe represents 27 per cent of London’s total employment in this sector;
- printing businesses are struggling to compete in price terms but there are opportunities for growth in higher added value activities such as digital production;
- printing businesses need investment in the skills base to support attempts to promote growth in higher added value activities;
- printing businesses display more of the classic attributes of a cluster than publishing, placing much greater reliance on local and regional markets, particularly the City; procuring more locally, and featuring sub-contracting and informal referrals between businesses;
- editorial jobs in publishing are knowledge intensive and generally require graduate level staff; and
- publishing firms often target specific markets, such as fashion, finance and professional services, and furniture and product design.

Printing

Importantly, the report identified that the issues highlighted by the DTI (see page 4 above) and British Printing Industries Federation (BPIF) for the national industry also applied to the local sector. However, it emphasised that these issues were ‘particularly pressing in the context of Inner London, where property and wages are most expensive’.

Also in common with the rest of the UK, the printing industry in the City Fringe is dominated by small and medium-sized enterprises (SMEs) with most printers serving local markets. In 2002, there were approximately 8,000 people working in 804 businesses – an average of around 10 employees per business.

Although this represents 27 per cent of total sector employment in London, there have been substantial job losses. From 1998 to 2002, there was a 26.1 per cent decline in employment – disproportionately, that means job losses around five times higher than the national average. Much of the decline is attributed to productivity gains resulting from automation of printing processes.

Table 1: Employment in City Fringe printing industry 1998–2002

	1998	2002	Change 1998–2002	
	Total	Total	Numbers	%
City Fringe	10,667	7,889	-2,788	-26.1
Greater London	35,886	29,334	-6,552	-18.3
Great Britain	200,154	180,854	-19,300	-9.6

There have also been a disproportionate number of printing businesses lost in the City Fringe compared to the national picture.

Table 2: Stock of printing businesses 1998–2002

	1998	2002	Change 1998–2002	
	Total	Total	Numbers	%
City Fringe	997	804	-193	-19.4
Greater London	4,155	3,669	-486	-11.7
Great Britain	20,104	19,376	-728	-3.6

Nevertheless, the CFP report also emphasised that there would always be a demand for printing services in the area, largely generated by the City and that, similarly, the printing sector was important to the competitiveness of the financial cluster in the City.

Publishing

In contrast, the publishing industry in the City Fringe experienced increases in both total employment and business numbers over the same period. This accounts for 40 per cent of total sector employment in London, which in turn accounts for 40 per cent of the UK sector total.

Table 3: Employment in City Fringe publishing industry 1998–2002

	1998	2002	Change 1998–2002	
	Total	Total	Numbers	%
City Fringe	24,020	27,097	+3,077	+12.8
Greater London	58,885	67,676	+8,791	+14.9
Great Britain	162,994	166,572	+3,578	+2.2

Table 4: Stock of publishing businesses 1998–2002

	1998	2002	Change 1998–2002	
	Total	Total	Numbers	%
City Fringe	1,119	1,155	+36	+3.2
Greater London	4,388	4,596	+208	+4.7
Great Britain	11,582	12,734	+1,152	+9.9

N.B The tables above refer to the number of employees and stock of businesses across the whole of the City Fringe boroughs, rather than the core wards.

In light of these figures, the BOP report suggested that ‘the future for the larger/leading print companies in the City Fringe is likely to lie in offering a combination of print and value-added services’. But it added that ‘this is not a realistic option for many of the small, traditional companies in the City Fringe, which lack the capacity and management skills to be able to move into these markets’.

It therefore recommended that the CFP and CAG consider interventions around:

- improving production processes;
- streamlining supply chains;
- helping firms re-think their competitive strategy;

- training new entrants and raising skills levels to meet changes in technologies and markets;
- workshops/seminars on the use of the Internet for marketing and e-commerce;
- local procurement to promote the area's printers to the City; and
- improving cross-sector networking.

The strategic context

The London Development Agency (LDA)

The Mayor of London's economic development strategy, 2005 – *Sustaining Success* – focuses on four major themes:

- Investment in London's places and infrastructure
- Investment in people
- Investment in enterprise
- Investment in the marketing and promotion of London

The PPSIP addresses all of these.

Many of the printing and publishing businesses in the City Fringe are located alongside some of the most deprived areas in London so the interventions identified for the sector will contribute directly to overall regeneration efforts.

Many of the interventions are designed to improve the competitiveness of local firms thereby encouraging businesses to develop. The interventions will also support people by improving the skills of the existing workforce and training local people in the skills they would need as new entrants. This aims simultaneously to break down barriers to employment, help to ensure that the sector has the diverse, well-skilled workforce it needs to compete and grow, and contribute to increased income levels in the City Fringe.

Further, the PPSIP is industry-led and City Fringe businesses are taking a positive stance in addressing the issue of competitiveness, and helping to promote the industry in the City Fringe to young people as a creative hi-tech, modern industry.

Other important links

The publishing sector in particular is categorised as a creative industry by the LDA and one of the key members of the PPCAG is the London College of Communication (LCC). The LCC manages the LDA Creative London 'Own It' and 'Creative Enterprise Centre' interventions.

Similarly, the DTI-backed industry forum, Vision in Print (VIP) which was established to help printing businesses become more productive, competitive and profitable, is a key partner in the PPCAG.

The City Growth Strategy (CGS)

The PPSIP should also be seen within the context of the CFP's City Growth Strategy (CGS). It focuses on the competitive advantages of the City Fringe and uses an evidence-based approach that emphasises the importance of developing clusters of related industries.

The CGS outlines an analysis of the area and suggests a programme of intervention designed to enhance and sustain its competitive economic advantages, with the underlying objectives of both economic and social development. It identifies key sectors and clusters through an audit of business activities and extensive research and business intelligence.

As we have described earlier, a CFP-commissioned report highlighted the significance of the printing and publishing sector in the City Fringe in terms of size and concentration as well as some of the competitive pressures that the sector, particularly printing, is facing.

More generally this clustering has a high local 'economic multiplier' throughout the supply chain, which is of significant benefit to the area, not least in terms of environmental and sustainability issues. The report also noted that local printers have traditionally recruited a local workforce. As printing industry salary levels have consistently been at the top of the manufacturing sector league table, much of these earnings are circulated back into the local economy – benefiting the neighbourhoods where businesses are based and employees live.

The stated aims of the CGS, which the PPSIP supports and reinforces, are to:

- act as a catalyst in the development of a sustainable, diverse, competitive business environment, recognising the role of the City Fringe as a major business activity area within the Greater London economy;
- enhance the employment prospects, motivation and skills of the residents of Camden, Islington, Hackney and Tower Hamlets, particularly those at a disadvantage, to enable them to compete effectively in the City and City Fringe labour market and wider London labour market and to promote equality of opportunity;
- ensure the supply of an appropriately skilled labour market to City and City Fringe businesses;
- exploit the economic advantages of the City Fringe's inner city location and its untapped markets;
- maximise the employment and business benefits of the continuing growth of the City's financial institutions to the resident and business communities of the wider local authority area; and
- secure benefits for the wider London economy from the development of the City and City Fringe economy and make links with other priority regeneration areas or sectors in London.

Private/public partnership and the PP Cluster Action Group (PPCAG)

Another essential component of the CGS is its emphasis on industry-led ideas and action in partnership with public sector agencies. This has been achieved through the PPCAG, a private/public sector group that has been key to identifying the interventions

proposed within this PPSIP. The launch of the BOP report and some of the associated press coverage in both the national and trade press provided the catalyst for the formation of the CAG. The Group is chaired by the Group Chief Executive of a large City Fringe printer specialising in financial investment and corporate printing and the Vice Chair is Managing Director of a well established specialist education and business publishing house.

The PPCAG has 18 active member organisations of which 14 are sector-specific businesses and representative organisations, covering all major aspects of the business in the City Fringe area. Specifically, the eight local companies are involved in print management; quick printing; digital and litho printing; specialist stationery and book-binding, and business and investment publishing. Other members include the BPIF; the print union GPMU/Amicus; Spitalfields Print and Design Network; Business Link for London (BL4L); Learning and Skills Councils; the London College of Communications, and Vision in Print.

The PPCAG also set up two sub-groups to put together specific interventions for the PPSIP – the Business Development and Support sub-group and the Training and Workforce Development sub-group. The first was instrumental in developing the interventions for themes 1, 2 and 4 while the second focused on theme 3 interventions.

Interestingly, the Training and Workforce Development sub-group also looked at the relative profiles of printing and publishing firms among young people. It found that, whereas publishing is an appealing career with no problems attracting high calibre (normally first degree minimum) candidates, this was certainly not the case with printing.

The latter suffers a poor image, not helped by an often out-of-date portrayal of the industry by influential people such as teachers and careers advisers. The move to digital printing and the increasingly hi-tech nature of the industry needs to be emphasised to schools and colleges and to young people themselves as well as its relatively high pay levels. Interventions proposed by the Business Development and Support sub-group around environmental performance (theme 4) also reflect that the print sector is a more modern cleaner industry than is often portrayed.

PPCAG members are also in contact with other businesses in the sector and more private sector companies have become Members of the Group during 2005. The Group has commissioned further research, particularly into the needs of black and minority ethnic-owned (BME-owned) businesses and micro-businesses.

The rationale for this additional research was that the Group considered that the BOP qualitative evidence was, in the main, gleaned from the larger companies in the City Fringe and views of micro businesses was needed to ensure that their concerns had been taken on board.

The Group also intend to promote good practice in terms of equality and diversity within the workforce and open up opportunities for non-traditional entrants such as women and ethnic minority, into the workforce.

The Group considered the BOP recommendations would be difficult to implement in respect of the scope for local printers and publishers to offer added value services such as facilities management to major corporate businesses. The Group felt that these potential “outsourced services” had reached optimum levels with little scope for further business opportunities. The CAG recommended that the PPSIP should concentrate on other recommendations from the report and in enhancing the print and publishing cluster in the ways outlined below.

The PPSIP

Introduction

The PPSIP aims to put in place the building blocks for the long-term future of the industry to:

- ensure a legacy of skills in the workforce;
- improve the profile of the sector as a career choice for young people;
- enhance business development and innovation; and
- contribute to the economic and social fabric of the area.

Vision

The PPSIP vision is that by 2010, the City Fringe printing and publishing sector will have:

- maintained its current position as preferred supplier to existing markets such as its traditional City markets;
- increased its internal rates of local procurement and sourcing;
- further developed and expanded its reach into emerging global markets; and
- further contributed to the economic development of the City Fringe.

Aims and objectives

The overarching aim of the CFP is to enhance the competitiveness and productivity of printing and publishing SMEs in the areas that border the City of London to the north and east.

To achieve this, the PPSIP objectives are to:

- increase environmental awareness and improve processes through cost-effective initiatives;
- strengthen industry benchmarking;
- enhance the general management skills of the industry;
- increase exploitation of local authority contracts by local businesses;
- improve opportunities for women and people from minority ethnic groups;
- improve business competitiveness and performance;
- enhance and develop the printing-related cluster in the City Fringe, increasing networking and collaborative opportunities for local businesses;

- address the issue of the printing industry's ageing workforce and support local non-traditional recruits (women, disabled people, people from minority ethnic groups) into jobs in the area; and
- enhance the sector's profile as a career choice for young people.

Themes

The four themes of the PPSIP should not be seen as discrete areas but as part of the overall vision and plan. They are designed to complement each other in enhancing the competitiveness and long-term sustainability of the printing and publishing sector in the City Fringe. They are:

1. Business Support
2. Business Development and Innovation
3. Recruitment, Training and Workforce Development
4. Environmental Development and Sustainability

Theme 1: Business Support

Develop and deliver a programme of business support initiatives tailored to meet the needs of the local cluster				
Rationale – to improve business competitiveness and performance				
<p>These initiatives are aimed at improving the skills of the current workforce and introducing better management practices among local firms.</p> <p>Following an initial diagnostic assessment of all key aspects of a firm's business, specific support will be offered including:</p> <ul style="list-style-type: none"> • Health and Safety • HR Management • Financial Management • Industry Benchmarking • Professional Development Training • Management and Leadership • Diversity Management • Best Practice and Quality Improvement Programmes <p>The programme will deliver any or all of the support above, depending on an individual firm's needs, and using appropriate London-based training providers.</p>	Partners	Costs	Outputs	Funders
	Employers	£250,000	110 ERDF A3	BL4L
	BPIF	ERDF	24 ERDF A1	ERDF
	BL4L	£100,000	50 LDA 4	CFP/LDA
	VIP	BL4L		Employers
	LCC	£125,000		
	Other London-based training providers	BPIF *		
	£25,000			
	VIP *			
	£100,000			
	LDA			
	Total			
	£600,000			

* inc. private sector company contributions

Theme 2: Business Development and Innovation

Develop and deliver a programme of business development initiatives tailored to meet the needs of the local cluster				
Rationale – to enhance and develop the printing-related cluster in the City Fringe, increasing networking and collaborative opportunities for local businesses				
<p>Section A</p> <ul style="list-style-type: none"> Develop a web-based portal site for the cluster Publish a directory of City Fringe printers and publishers <p>Section B</p> <ul style="list-style-type: none"> Establish an export and new markets promotion project aimed at international trade fairs and other appropriate outlets <p>Section C</p> <ul style="list-style-type: none"> Deliver a series of local procurement seminars identifying policies and business practices of public sector agencies and publishers <p>Section D</p> <ul style="list-style-type: none"> Survey of BME-owned and micro-businesses to assess their support needs <p>Section E</p> <ul style="list-style-type: none"> New Business starts 	<p>Partners</p> <p>Employers</p> <p>DTI Employers BL4L BPIF</p> <p>Local authorities BL4L Employers</p> <p>As above</p> <p>As above</p>	<p>Costs</p> <p>£40,000</p> <p>£25,000</p> <p>£5,000</p> <p>£5,000</p> <p>£75,000</p>	<p>Outputs</p> <p>50 - LDA 4</p> <p>x 2 seminars</p> <p>x 1 report produced</p> <p>9 --ERDF A6 4 -- ERDF A4 5 --LDA 3</p>	<p>Funders</p> <p>CFP current budget</p> <p>LDA Single Programme</p> <p>Local Authorities</p> <p>CFP current budget</p> <p>LDA Single Programme</p>

Theme 3a: Training and Workforce Development

Deliver new technology training, and management and leadership skills training				
Rationale – to provide industry-led training that meets identified skills gaps within the workplace				
	Partners	Costs	Outputs	Funders
<ul style="list-style-type: none"> • These initiatives are aimed at improving the skills of the current workforce in the printing industry. • Clients increasingly expect printers to be IT-literate (pdf files, electronic databases etc) but skills gaps identified range across the spectrum of packages and operating systems. • Develop and establish a pre-employment training programme for publishing companies, related to advertising and subscription sales areas, and industry-specific core skills training 	Employers	£240,000	45 LDA 4	CFP/LDA -- 240k
	BPIF		5 LDA 3	
	LCC		30 LDA 6(iii)	
	Other training providers		25 LDA 6(ii)	
		£240,000		

Theme 3b: New Entrant Recruitment and Training

Develop and deliver pre-entry training programmes and improve links between employers, educators and trainers to encourage new and non-traditional recruits into the sector

Rationale – to provide industry-led training that meets identified skills gaps within the workplace

	Partners	Costs	Outputs	Funders
<ul style="list-style-type: none"> Develop and establish a pre-entry training programme for local people interested in a career in printing 	Employers	125,000	25 – LDA 2	CFP/LDA
	BPIF			
<ul style="list-style-type: none"> Encourage non-traditional recruits to the workforce including women, disabled people and people from minority ethnic groups to provide a diverse workforce that better reflects the local community 	LCC		30 -DA 6(iii)	
	The Ethnic Minority Enterprise Project (EMEP)			
<ul style="list-style-type: none"> Improve links between sector employers, schools, and other education and training providers 	Other London-based training providers	75,000	200 LDA 6(iii)	
<ul style="list-style-type: none"> Promote a Modern Apprenticeship scheme among employers 		75,000	10 LDA (6ii)	
		£275 ,000		

Theme 4: Environment and Sustainability

The CAG recognise the impact that that business activity has on the environment and a series of products will be offered to companies to improve overall environmental performance

Rationale – to increase environmental awareness and improve processes through cost-effective initiatives

	Partners	Costs	Outputs	Funders
<ul style="list-style-type: none"> Environmental Improvement and Management Programmes Assess current environmental practices of local firms and promote benchmarking/quality standards such as ISO 14001 Promote the use of greener materials in printing processes and reduce volatile organic compound (VOC) emissions, related to alcohol and other solvent use Reduce the percentage of waste generated and increase the percentage of waste recycled Promote and deliver an Environmental Assessment scheme for local firms 	Employers BPIF Other London-based training providers	£50,000 ERDF £25,000 BPIF £25,000 VIP £100,000	20 (ERDF A3) 8 (ERDF A1)	ERDF BPIF CFP/LDA Employers

Notes:

LDA output definitions:

1. Employment support
2. Business creation
3. Business support of which
 - 4a are businesses engaged in collaborations
 - 6(i) Skills (basic)
 - 6(ii) Skills (Level 2)
 - 6(iii) Skills (any other)

ERDF output definitions

- A1 number of sme's assisted
- A3 number of sme's given advice
- A4 numbers of new sme's given advice
- A6 number of new sme's assisted

Social and economic inclusion – cross-cutting principles

The printing and publishing sector in the City Fringe is already a substantial employer with approximately 35,000 staff and self-employed people. The PPSIP aims to develop economic opportunities and increase employment still further for local people in some of London's most deprived areas.

In doing so, it recognises the implications for the social and environmental well-being of the area too. It also addresses issues of social inclusion, equality of opportunity, environmental protection, and quality living environments, all of which can contribute to prosperous, cohesive and sustainable communities.

To that end, the PPSIP supports and reinforces the CFP's general cross-cutting principles. These are to:

- maximise equality of access to opportunities by targeting black and minority ethnic communities and other disadvantaged groups;
- ensure the economic, social and environmental sustainability of CFP activities;
- work in partnership with stakeholders and other initiatives and organisations in the area whenever appropriate;
- maximise the transfer of knowledge between related regeneration activities in the City Fringe area, generating links and avoiding duplication of effort;
- work within the context of the regional infrastructure and strategies, especially the London Development Agency's economic development strategy and including the Community Planning Framework;
- ensure that strategies and programmes are developed on the basis of firm empirical evidence and backed by ongoing research; and
- develop best practice in integrating new economic developments in the City Fringe with the needs and priorities of local communities.

Olympic opportunities

Hosting the Olympic Games in London in 2012 presents a unique opportunity for growth for businesses in the City Fringe as well as in London and the UK as a whole.

Printing and publishing in the area, in particular, has been identified as one sector within the media and creative industries likely to 'reap the most benefit' – in sales and marketing opportunities as well as impetus for new starts. It represents a significant opportunity for the sector to grow and improve its productivity in the face of increased competition from lower cost areas in the UK and the wider global market place.

Employment forecasts are promising too, indicating that not only will there be an increase in the number and variety of jobs overall but also that the 'quality' of jobs will improve as a result of inward investment.

In order to enable all City Fringe businesses, including the printing and publishing sector, to capitalise fully on the opportunities the Olympics will bring, the LDA and Olympic agencies will put in place a number of support measures will be put in place. These will include:

- Business Intelligence Unit – a focal point for linking businesses to opportunities
- Business Club – a brokerage, business support and start-up service
- Supply Chain Development – supporting the creation of business consortia
- Thames Gateway Creative Skills Partnership – boosting skills provision and developing the area’s creative workforce
- Affordable workspace – ensuring that businesses have good access to their target markets

In particular, the PPCAG will ensure that all local firms in the sector are fully aware of any business opportunities that arise from the Olympics.

Options assessment and risk analysis

Options assessment

The options for taking forward the PPSIP as outlined above are:

- not to implement it;
- to implement it on a reduced scale; or
- to devise and implement an alternative.

If the PPSIP is not implemented, it is likely that the printing and publishing sector would be at risk from further loss of market share. This would result in the inevitable closure of businesses and associated loss of jobs, exacerbating many of the problems that public sector agencies are trying to address through regeneration.

If the PPSIP is implemented on a reduced scale, the impact on the sector would also be reduced. There is a risk that it would not create the critical mass needed to ensure a sustainable sector able to compete effectively in the global market place without further support. This too may result in the closure of businesses and the loss of jobs.

It is unlikely that a revised PPSIP would command the same level of private sector support, which is crucial to its successful implementation.

Risk analysis & management

Business 'take-up'/demand insufficient	<p>This programme of support has been designed and developed by businesses themselves and will be market-tested to refine specific offers before it starts. The key delivery partners have forecast the take-up of services through their experience with similar programmes in London (BL4L) and in other regions of the UK (BPIF and VIP).</p> <p>Assessed as low risk</p>
Partners fail to deliver	<p>The partners involved in delivery and management have experience and proven track records delivering European, national and regional development and regeneration programmes. An overall Partnership Agreement and individual SLAs and delivery plans will be put in place.</p> <p>Assessed as low risk</p>
Timetable slippage	<p>Regular monitoring will ensure early identification of potential problems to allow time for mitigation. The workplan has sufficient time at the outset to identify and address potential problems. Some slack has also been built into the delivery plan.</p> <p>Assessed as low risk</p>
Outputs/outcomes not achieved	<p>The workplan includes a timeframe for delivery. This will be underpinned by a more detailed action plan for each specific intervention encompassed within the contract between the accountable body and the delivery agent. Monthly reports are required from delivery partners and quarterly review meetings will quickly identify any shortfalls in targets that will be rectified through remedial action.</p> <p>Assessed as low risk</p>
Equality/sustainability targets not met	<p>The CFP and partners have established equality and sustainability policies, which will be adopted by all partners involved in the overall management and delivery of the PPSIP. Shortfall will be identified on a monthly basis and remedial action planned. The PPCAG accepts that a key issue will be the commitment of individual businesses to take part – this will be gauged at the market-testing seminar. We will use intermediary agencies with experience of working with BME-owned companies to assist in the attainment of these targets.</p> <p>Assessed as low/medium risk</p>

Project overspend	The funding and budget forecast are based on the delivery partners' extensive experience. Issues will be flagged up through monthly financial monitoring and remedial action taken to minimise risk. Assessed as low risk
CFP ceases to exist in June 2007	The CFP joint venture agreement currently runs until June 2007, after which it is possible that the Partnership will cease although the LDA has indicated that it is likely to extend its support for 07/08. If the CFP does come to an end, staffing costs through consultancy support have been built into the funding package to undertake ongoing management and monitoring of the programmes and interventions within the PPSIP. Assessed as low to medium risk

Implementation

Delivery management

The process for securing and drawing down funding from the public and private sectors for implementing the PPSIP has yet to be agreed. The anticipated model is that a package of funding will be secured that will be managed by the Corporation of London/CFP. The Corporation of London's Policy and Resources Committee received a report at its July 2005 meeting and approved the recommendations to take on this responsibility.

As the accountable body, the Corporation/CFP will then be responsible for implementing the PPSIP in conjunction with a steering group made up of the industry and other partner representatives. Ultimately, the PPSIP's success depends upon the printing and publishing sector maintaining active involvement in the design and management of investment.

The PPSIP is intended to be flexible. It should be responsive and able to adapt to changing circumstances and markets, and as new information becomes available. The needs of the sector should take precedence over the details within the PPSIP itself.

Commissioning

The PPSIP will be commissioned by inviting suitable organisations against a specification and in line with relevant standing orders of the accountable bodies and public funding agencies. The specification will identify the objective criteria for assessing the tender submissions.

The tender specification should encourage a consortium approach from tenderers in order to achieve more effective delivery by agencies working in partnership.

Communications

The delivery of the PPSIP will be supported by an integrated marketing communications plan incorporating both on-line and off-line activity to include a website, and digital and paper newsletters to ensure access to information for those not currently networked. A media and PR element will help to reinforce messages both to the public and the trade.

The communications will be two-way to enable the sector to provide feedback on delivery to the steering group so that the PPSIP can be adapted to changing circumstances.

Monitoring and evaluation

Monitoring

After approval of the tender submissions, a detailed project plan, with key milestones and outputs, will be prepared for approval by the steering group. The group will then monitor the project plan on a quarterly basis.

A formal monitoring report will be disseminated to key stakeholders and public sector funders. The details of this monitoring function will form part of the steering group's terms of reference.

Evaluation

A robust evaluation of the PPSIP is important to assess the impact and effectiveness of its programme of interventions. All parties – public and private sector funders and the printing and publishing sector itself – will need to see an appropriate level of return on their investment.

The evaluation methodology should take into account both the hard outputs and the softer outcomes. And a key measure in the evaluation process will be the private sector's view of the effectiveness of the PPSIP and the sustainability of the interventions.

Economic impact

The PPSIP will have a positive impact on both the local and the wider regional economy.

It will benefit the City Fringe by increasing the competitiveness of sector businesses in the area. It will assist businesses to move to higher added value manufacture by investing in skills and technology. And it will have a positive impact on businesses' supply chains.

The PPSIP will also assist businesses to export and access new markets and in so contribute to the wealth of the regional economy, with business growth resulting in an increase in GDP per capita.

Social impact

The PPSIP will have a positive social impact, bringing increased employment opportunities for people in some of London's most deprived areas.

By specifically targeting disadvantaged groups – including women, disabled people and people from minority ethnic groups – it will address issues around social inclusion and equality of opportunity. By encouraging non-traditional recruits, this targeting will also help to address the issue facing the printing industry in particular, of an ageing workforce.

In addition, the PPSIP will increase the number of businesses participating in activities within the wider community, including schools liaison – for example, offering Year 11 students work placement opportunities to enrich their GCSE curriculum.

Environmental impact

The PPSIP will have a positive environmental impact. It will increase awareness in the sector and improve processes through cost-effective initiatives. Businesses will be provided with specialist sector support including advice on environmental compliance and best practice; benchmarking and quality standards.

The PPSIP will promote the use of greener materials in printing processes and encourage a reduction of waste and an increase in recycling. It will also deliver an Environmental Assessment scheme for local firms. For example, the Environmental Management Programmes will help firms towards the achievement of BSI's ISO 14001 and the Greenmark accreditation. This will not only improve companies' quality and performance standards but also the quality of their local environments.