



This Market Intelligence provides expert insights into the rapidly evolving sectors of printing, outsourcing, retail technology, and supply chain management.

With forward-looking perspectives on each industry, this collection of articles delivers essential guidance to help businesses remain competitive, innovative, and resilient.

What's inside:

Four Key Takeaways from DRUPA 2024 2-5
By Keith Copestake

The Impact of Full Employment on Business Process Outsourcing (BPO): Strategic Insights for Securing Your Business's Future 6-8
By Harvinder Rattan

The Future of Point of Sale Devices 9-13
By Paul Lucraft, Paul Seddon and Jon Barras

Current Supply Chain Landscape 14-17
By Deepak Pandya

Agency Staff – Why the small stuff matters 18-19
By Glenn Cotter



Four Key Takeaways from DRUPA 2024

By Keith Copestake

The much-anticipated return of DRUPA, the world's largest printing exhibition, after an eight-year hiatus, has left the industry buzzing with excitement and optimism.

Held in Düsseldorf, this event showcased the latest innovations, trends, and future directions in the printing industry. Here are the four key takeaways from DRUPA 2024 that are set to shape the future of printing:

1. New Technologies Revolutionising Print

One of the standout features of DRUPA 2024 was the impressive array of new technologies that are transforming the printing industry. Landa's continued expansion into the packaging and marketing print space with their advanced nanography technology was particularly noteworthy. Originally known for

their innovative print solutions, Landa's latest press developments were quite breathtaking, setting a new benchmark in print quality and speed. This move will undoubtedly give traditional litho printers a real run for their money, marking a significant shift in the competitive landscape.

2. Environmental Considerations Take Centre Stage

Environmental sustainability was a prominent theme throughout DRUPA 2024, and it's a topic that is often misunderstood when it comes to the printing industry. Many consumers don't

realise that our industry is actually one of the most environmentally friendly sectors in the world. For instance, the use of paper is NOT damaging to the environment—quite the opposite. Paper is grown as a crop, much like wheat for bread, and contrary to the misconception that rainforests are being cut down, paper production always involves trees that are cultivated specifically for this purpose. These trees use up carbon dioxide as they grow, contributing positively to the environment. Furthermore, paper remains the most recycled product people use, which reinforces its sustainability credentials.

3. The Growing Role of AI in Printing Production

Artificial Intelligence (AI) has firmly embedded itself into the fabric of modern printing, and DRUPA 2024 clearly demonstrated this. AI is now integral to various aspects of the printing process, from automation and efficiency improvements to enhancing print quality and enabling personalised content. For example, AI-driven technologies are automating tasks such as typesetting, colour correction, and

print quality control, significantly reducing production times and costs. Additionally, AI enables highly personalised printing through Variable Data Printing (VDP), where individual print pieces can be tailored to specific customer needs without compromising speed or efficiency.

Moreover, AI contributes to more sustainable printing practices by optimising ink usage, reducing paper waste, and improving energy efficiency. This not only makes the printing process more efficient but also aligns with our industry's environmental goals. The impact of AI on predictive maintenance and supply chain optimisation cannot be overstated, as it ensures that printing presses are always operating at peak efficiency, minimising downtime and resource wastage.

4. Personalisation in Large Format Products

Personalisation continues to be a growing trend, particularly in large format printing. At DRUPA 2024, I was particularly impressed by innovations that allow for the customisation of products that were previously difficult to personalise due to



their size and shape. For example, there was a machine small enough to go into stores or offices that will personalise any product size or shape with personal details. The potential for personalised packaging and promotional materials is immense. One standout example from the show was a machine that could personalise a pizza box with the name of the buyer, the type of pizza, and even a colour picture of the buyer taken from a camera when the order was placed. There were also machines capable of personalising metal objects and even large pieces of equipment that could print promotional messages on internal walls, which could be removed and changed as often as needed.

This growing trend was evident across various booths at DRUPA, where the blurring of lines between different printing sectors was on full display. From on-demand printing solutions to personalised large-format products, the industry is clearly moving towards more individualised production capabilities. As consumers continue to seek unique and tailored products, the ability to offer personalised items on a large scale is becoming increasingly important.

The Future of Printing: A Blurred Landscape of Opportunities

As we look to the future, the boundaries between different sectors and technologies in printing will continue to blur. This was evident in the strategic partnerships and collaborations announced at DRUPA 2024, such as the cooperation between Heidelberg Druckmaschinen and Canon to launch new inkjet products. This trend of collaboration reflects a growing openness and willingness across the value chain to work together, and it's a trend that we'll see not only during DRUPA but also in business in general.

The traditional divide between offset and digital printing is also diminishing. At DRUPA, Kodak emphasised that both methods are complementary, not competitive, and that the future will see a blending of technologies to meet diverse market demands. It's not a question of whether you'll be offset or digital—you really need to be both. This integration reflects a broader trend where businesses are diversifying their offerings and embracing a mix of printing techniques to meet the varied demands of modern consumers.



Moreover, the rise of digital and personalised printing aligns with broader trends in e-commerce and the creator economy, where short runs and custom orders are becoming the norm. Companies like Gelato are leading the charge in developing software solutions that bridge the gap between traditional printing methods and the digital age, ensuring that businesses can remain agile and responsive to changing market dynamics.

In summary, DRUPA 2024 has underscored that the printing industry is not only resilient but also innovative and forward-thinking. With advancements in technology, a strong commitment to sustainability, and the increasing integration of AI, the future of printing is poised to be dynamic, versatile, and more connected to the needs of consumers than ever before.

How can ERA help?

ERA Group is uniquely positioned to help businesses navigate the rapidly evolving printing industry by integrating cutting-edge technologies, such as Landa's nanography and AI-driven solutions, to enhance operational efficiency and enable large-scale personalisation. We also prioritise environmental sustainability by providing access to eco-friendly materials and processes, helping companies meet the growing demand for green products. At ERA Group, we evaluate our clients' print procurement processes to determine how new technology can help improve their bottom line and optimise their market approach.

By partnering with ERA Group, businesses can stay competitive, innovative, and sustainable in the dynamic printing landscape.



The Impact of Full Employment on Business Process Outsourcing (BPO): Strategic Insights for Securing Your Business's Future

By Harvinder Rattan

Full employment, once a hallmark of economic strength, has become a double-edged sword.

With talent pools shrinking and hiring costs rising, companies are struggling to fill key positions, particularly in back-office and operational roles. This talent shortage is driving a significant shift towards Business Process Outsourcing (BPO), offering a viable solution to these persistent challenges.

In today's rapidly evolving economic landscape, businesses across the UK and globally are grappling with unprecedented challenges in maintaining workforce stability and efficiency.

The Talent Crisis: A Call for Innovative Solutions

Recent data highlights the tightening labour market in the UK, where unemployment rates have hit historically low levels. While this might suggest a healthy economy, the reality for businesses is far more complex. The scarcity of qualified candidates, particularly for junior and mid-level roles, has left many organisations grappling with unfilled positions, increased wage pressures, and the risk of operational inefficiencies.

For instance, a mid-sized firm in Germany recently struggled to fill critical accounting roles, leading to delays in financial reporting and increased stress on their existing team. This scenario is not unique. Across sectors, businesses are finding that the traditional approach to hiring is no longer sustainable. The shrinking talent pool, combined with rising wages, has made it increasingly difficult to maintain operational efficiency.

In such a scenario, BPO emerges as a strategic solution. By leveraging the expertise and availability of a global workforce, companies can mitigate the risks associated with local talent shortages. Outsourcing non-core functions such as finance, accounting, customer service, and procurement operations to regions like Poland, where talent is both abundant and cost-effective, can provide much-needed relief. This approach not only alleviates immediate hiring pressures but also ensures that businesses maintain operational continuity without compromising quality.

Expanding Through the Build-Administer-Transfer (BAT) Model

Businesses seeking strategic global expansion have increasingly turned to models such as Build-Administer-Transfer (BAT). Poland has emerged as a key hub for shared services, with over 1,941 centres employing more than 470,000 people. By leveraging a model like BAT, companies can start small with a targeted team and expand as needed, seamlessly integrating these operations into their global framework.

For example, a Silicon Valley FinTech company began with a small team in Poland focused on compliance and internal audit. As the pilot team successfully integrated with the firm's U.S. operations, the company expanded its Polish operations to include roles in digital technology and capital strategy. This measured, low-risk approach helped the company mitigate risks while positioning itself for global growth.

Why Choose ERA for BPO?

At ERA, we offer more than just outsourced services—we provide strategic solutions tailored to the unique needs of your business. Our BPO services are designed to help you navigate the challenges of full employment and operational complexity:



- **Access to High-Quality Talent:** Our network in Poland provides access to skilled professionals who can seamlessly integrate into your business operations.

- **Cost-Effective Solutions:** Outsourcing with ERA helps you control costs, enabling you to reinvest savings into core business activities.

- **Flexibility & Scalability:** Whether you need one person or a full team, our BPO services can scale to meet your requirements, with contracts that offer flexibility and short termination periods.

- **Risk Management & Compliance:** Our employees are fully compliant with Polish employment laws, ensuring that your business benefits from maximum flexibility with minimised risk.

The Strategic Advantage of BPO in a Competitive Market

The business environment is evolving rapidly. Disruptive technologies and an increasingly complex legal landscape are forcing companies to rethink their operational models. BPO offers a pathway to not only manage these pressures

Contact us today to explore how our BPO solutions can transform your business operations and position you for success in a challenging economic landscape.

but also to turn them into opportunities for growth and innovation.

For example, a leading UK retailer is in discussions with ERA to outsource their customer service operations to Poland. This move is expected to reduce their operational costs by 30% while improving customer satisfaction through the high-quality, multilingual support provided by our Polish team. Such examples highlight how ERA's BPO services can transform your operations, making your business more agile and competitive in a demanding market.

Secure Your Business's Future with ERA's BPO Solutions

As the UK continues to navigate economic uncertainties, the ability to adapt quickly and efficiently is crucial. BPO offers a strategic advantage that can help your business maintain its competitive edge. By partnering with ERA, you gain access to a comprehensive suite of outsourcing services designed to enhance operational efficiency, reduce costs, and drive long-term growth.



The Future of Point of Sale Devices

By Paul Lucraft, Paul Seddon and Jon Barras

The retail industry is undergoing a significant transformation, driven by advancements in Point of Sale (POS) technology. Traditional POS devices, once limited to processing payments, have evolved into multifunctional tools that enhance customer experience, streamline operations, and offer valuable business insights. This article delves into the capabilities of modern POS devices and highlights the advantages they bring to businesses.

The Evolution of POS Devices

In the past, POS devices were primarily used for processing payments. However, the latest advancements have expanded their functionality significantly. Today's POS devices can, as well as taking payments via multiple different payment methods, provide

management information and offer new services all on a single device. These devices are more robust, reliable, and resilient, ensuring they can withstand the rigors of daily use in a busy environment. Touch screens and contactless acceptance have replaced buttons, improving wear and tear and hygiene.



Multifunctional Capabilities

Modern POS devices are equipped with features that go beyond mere transaction processing. They can integrate with various business functions, such as ordering, inventory management, customer loyalty programs, and promotional activities. For instance, in a Food and Beverage / Hospitality businesses the devices can take food and drink orders and split bills between customers.

In addition, businesses can use new POS devices to recognise returning customers, offer personalised promotions, and manage

loyalty rewards seamlessly. The interactive and dynamic screens on these devices also serve as effective general promotional tools, displaying videos and advertisements to customers at the point of purchase.

Financial Benefits

One other significant benefit of modern POS devices is the potential for cost savings. Historically, many businesses rented their payment devices, incurring substantial long-term costs. For example, a typical rental fee of £20 per month over ten years amounts to £2,400, whereas the outright purchase of a

new device might only cost around £300 plus a few pounds per month for a service support contract. Owning the devices not only reduces costs but also offers greater flexibility in terms of selecting payment service providers and installing custom software.

Enhanced Data Security

Data security is a critical concern for businesses, especially those handling sensitive payment information. Modern POS devices are designed with advanced security features, including point-to-point encryption (P2PE), which ensures that all data transmitted through the device

is fully encrypted. This not only protects the business from potential data breaches but also simplifies compliance with Payment Card Industry (PCI) standards, thereby reducing the risk of hefty fines for non-compliance.

Future-Proofing Your Business

As the market continues to evolve, older POS terminals are reaching the end of their life cycle, making way for new, more advanced Android-based terminals. These new devices function like mini-computers, capable of running a multitude of applications that can enhance business operations.



For example, they can control other equipment like printers and tablets, manage inventory in real-time, and provide detailed sales analytics. This level of integration and functionality was unimaginable with older terminals.

A practical example of the impact of modern POS devices can be seen with a client who adopted Android terminals early on. By installing their custom applications, they integrated their POS devices with their accounting systems, enabling real-time updates and comprehensive control over

their operations. This transition not only streamlined their processes but also provided valuable insights into sales trends and inventory levels, demonstrating the tangible benefits of embracing modern POS technology.

Summary

The landscape of POS technology is rapidly changing, offering businesses opportunities to enhance their operations, reduce costs, and improve customer experiences. By adopting modern POS devices, businesses can future-proof their operations, stay ahead of the competition, and provide superior service

to their customers. As the industry moves forward, it is crucial for businesses to evaluate their current POS solutions and consider upgrading to these advanced, multifunctional devices.

For businesses looking to explore the potential of modern POS devices further, we invite you to contact us for more detailed information and personalised advice. Embrace the future of retail technology and transform your business today.



Scan the QR code to see how ERA Group helped MotorSport Vision achieve savings of 3% to 35% on all solution components.



Current Supply Chain Landscape

By Deepak Pandya

In the current landscape of supply chains, organisations are grappling with a host of challenges that are reshaping the way they operate.

Disruptions in supply chains, exacerbated by global events and uncertainties, have put a spotlight on the need for adaptability and resilience. In a recent KPMG survey only 55% of respondents felt that their supply chains are stable and well-prepared for the future, there is a clear call to action for improvements in stability and agility.

Moreover, the vulnerability to disruption, as expressed by 47% of respondents, underscores the critical importance of enhancing resilience measures. Labour shortages have emerged as a pressing issue, with 36% of respondents flagging it as a short-term concern and 37% viewing it as a long-term challenge. These workforce constraints are impacting operational efficiency and

necessitate strategic workforce planning to mitigate risks effectively.

Outlook

Looking towards the future of supply chains, a transformative shift is underway towards embracing advanced technologies such as artificial intelligence (AI), automation, and digital twins (A digital twin in supply chain management is a virtual model of a real supply chain that uses real-time data to simulate scenarios and predict outcomes).

Organisations are urged to invest in robust digital foundations to enhance operational visibility and responsiveness. Addressing Environmental, Social, and Governance (ESG) commitments is becoming increasingly vital, reflecting a broader industry trend towards

sustainable and ethical practices.

The evolving workforce dynamics are marked by a growing emphasis on reskilling and upskilling to align with the demands of automation and AI integration. Roles within supply chains are being redefined to leverage AI for predictive analytics, strategic decision-making, and operational efficiency. The future state of supply chains will be characterised by a blend of human expertise and technological innovation to drive productivity and competitiveness.

A short-term view of your supply chain dominates a board's discussion, it is easy to lose focus on building capability for the longer term. Influenced by geopolitical shifts and regulatory reforms, are shaping the strategic



direction of supply chain management. Organisations are urged to proactively engage with industry partners, leverage, and partner with their independent expertise to mine data analytics for informed decision-making and adapt to outsourced support to manage the day-to-day visibility affording them more time to focus on future proofing their supply chains.

By fostering a culture of innovation, collaboration, and adaptability, companies can navigate the complexities of the supply chain ecosystem and position themselves for

sustained success in an ever-evolving business environment.

How can ERA Group help?

Supply chains are undergoing significant transformations to adapt to sector-specific changes and an ever-evolving industry landscape. Companies are leveraging advanced technologies, sustainable practices, and compliance measures to enhance operational efficiency and resilience.

The integration of digital solutions, workforce development initiatives, and strategic planning is crucial for navigating challenges and driving future success in the dynamic supply chain environment.

In the midst of these challenges, it's imperative for organisations to not only address current disruptions but also prepare for future demands. This is where ERA Group can be your strategic partner. By allowing ERA Group to manage your current supply chain needs, you can free

up critical resources and focus on long-term planning and innovation. Our expertise in navigating the complexities of supply chain management ensures that your operations remain resilient and efficient today while positioning your organisation to meet tomorrow's challenges head-on. We provide the agility and foresight needed to adapt to emerging trends and technologies, enabling you to concentrate on future-proofing your business in an increasingly unpredictable global market. Trust ERA Group to handle the now, so you can focus on what's next.

Sources: KPMG - Supply Chain Trends, ONS.Gov and Harvard business review - Global supply chains post pandemic



Agency Staff – Why the small stuff matters

By Glenn Cotter

When we make purchases, we typically focus on the total price rather than the cost of the individual components. We shop around for the best deal, and rightly so.

Similarly, when companies consider agency staff rates, they often look for the most competitive standard charge rate for a particular role with the required skills and qualifications. But is the standard charge rate truly the best metric for a meaningful comparison? The answer is no, and here's why.

The agency charge rate that appears on your invoice is composed of several elements—some are fixed by law, some are legislative but subject to interpretation, and others are determined by the agency itself. Companies can also influence the rate by deciding on the pay they wish to offer, usually in consultation with the agency.

Legislative Components:

- **Holiday Pay:** A fixed percentage of the pay rate

added to the Charge Out Rate (COR). Based on 5.6 weeks of holiday, this equates to 12.07%.

- **Pension:** 3% of qualifying earnings.
- **Sick Pay:** Typically based on Statutory Sick Pay (SSP) eligibility, which can vary. Agencies often add a charge to meet this requirement.
- **Apprenticeship Levy:** Agencies with a wage bill over £3M must contribute 0.5% of their pay bill to the government.

Open Components:

- **Hourly Pay Rate:** This can vary depending on standard shifts, nights, overtime, weekends, etc.
- **Agency Margin:** The fee the agency charges for its services.

Legislative but Open to Interpretation:

- **Employer's National Insurance Contribution:** This component can vary based on how it is interpreted and applied.

All of these elements can influence the COR a company pays, but the most significant impact comes from how these components are applied. For example, two agencies paying the same standard pay rate can result in a cost difference of up to 30%—yes, 30%. Understanding all the elements of your COR and how they are applied can lead to substantial savings for your company.

Setting the pay rate, understanding the agency margin, and knowing how it is applied is something we excel at. We have guided many companies in optimising these mechanics, leading to significant savings without sacrificing quality or service. Our unique perspective and forensic analysis can help you achieve better value for your investment.

- A games manufacturer/distributor reduced a £341K spend on warehouse and general staff by 15.7%, saving £54K annually.

- A flour manufacturer cut £124K (15%) from its £828K workforce budget for warehouse and packing staff.

- In Hungary, a company operating across multiple locations saved £80K (14.5%) from its £548K spend on hospitality roles.

Agency staff offer a valuable resource for organisations looking to maintain flexibility and access specialised skills. However, to fully realise the benefits, it is essential to manage these workers effectively. By following best practices in communication, integration, feedback, and evaluation, organisations can ensure that their use of agency staff leads to positive outcomes for both the company and the workers involved.

By partnering with ERA Group, businesses can achieve significant cost savings while maintaining, or even improving, the quality of their operations. This holistic approach ensures that savings are realised across multiple areas, leading to improved financial performance and a stronger bottom line.

MarketINTEL

Insight and market analysis to achieve better value from suppliers



The knowledge that ERA has within its network of specialists is undeniably impressive. In every category of spend we were given useful insights which informed our decisions at every step. We continue to work with ERA and will recommend their work in the future. ””

JEEVAN KARIR,
CHIEF FINANCIAL OFFICER,
TAPI CARPETS AND FLOORING



Having a dedicated specialist auditing our expenditure following the tender process has ensured the real value of supplier consolidation has been achieved and that it is a sustainable and workable solution ””

ALAN HUTCHINSON,
FACILITIES DIRECTOR,
HOWARD KENNEDY



ERA have delivered incredibly valuable savings and supplier consolidation. This has given us much better control and efficiencies, and a level of insight to our spend which is priceless. ””

TOM RUMBOLL,
CHIEF EXECUTIVE OFFICER,
SYNETIQ



Want to know more?
eragroup.com

value through insight™