



Sustainability in the publishing supply chain

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Contents of the presentation

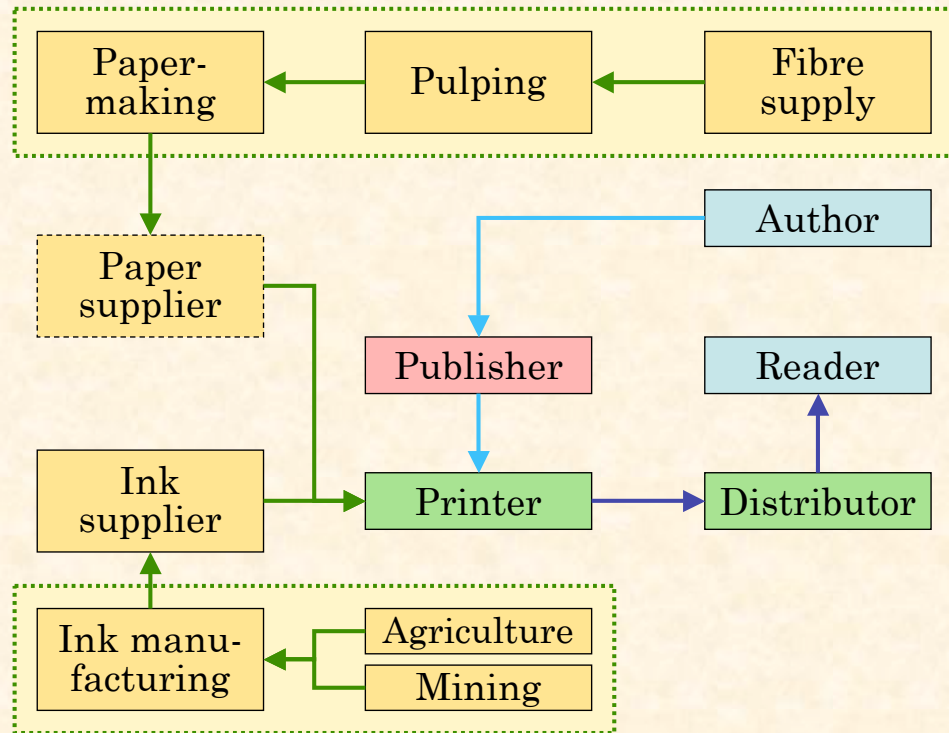
- Publishing supply chain
- The study
 - web questionnaires
 - interviews
 - roles, drivers, barriers

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Publishing supply chain



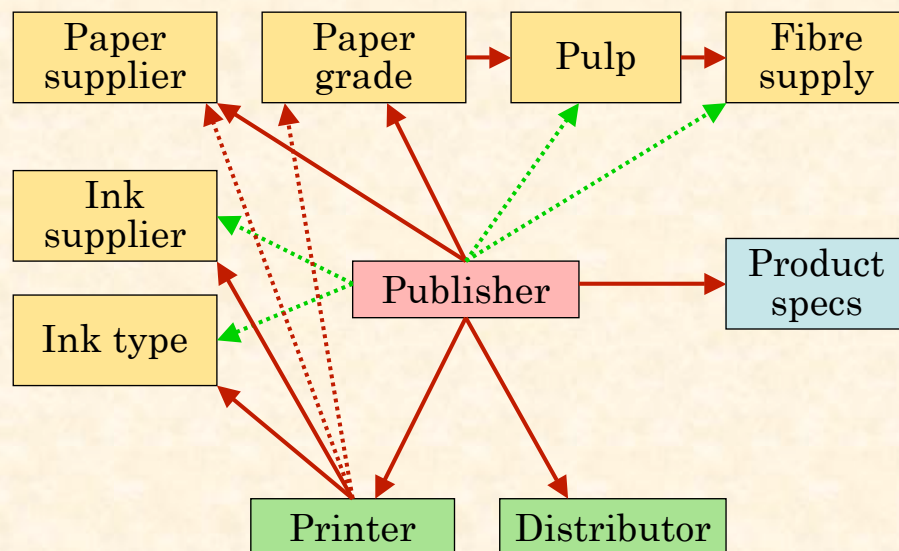
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Environmental decisions



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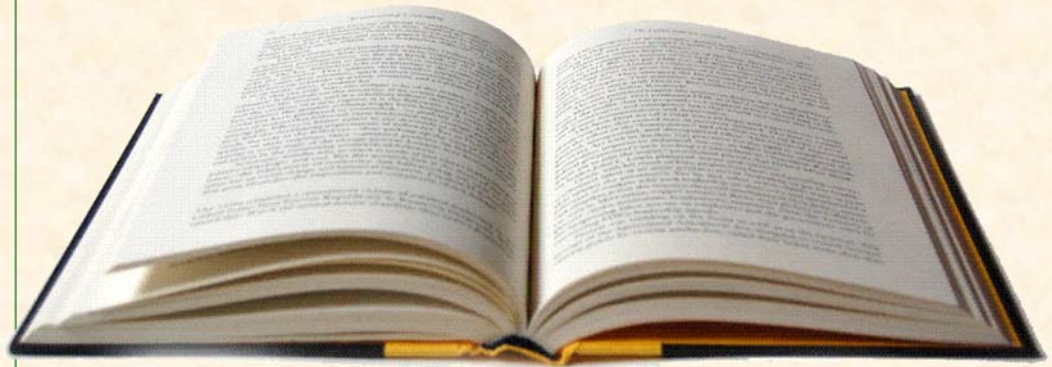
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Printed product

paper ink
printing process cover material binding
format colours
typography number of copies



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The study

- aim: description of environmental views and practices in the publishing supply chain
- stakeholders
 - readers
 - publishers
 - authors
 - printers
 - distribution
 - forest owners
 - pulp & paper suppliers
 - ink & chemical suppliers
 - environmental groups

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Methods

- **Survey: web questionnaires**
 - printers
 - publishers
 - printing industry experts
 - media technology students
- **Interviews**
 - information-rich decision-makers and experts from different stakeholder groups

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Web questionnaires

| Target group | N | Replies | Rate |
|---------------------------|-----|---------|--------|
| Printing companies | 240 | 24 | 10.0 % |
| Magazine publishers | 270 | 0 | 0.0 % |
| Book publishers | 100 | 24 | 24.0 % |
| Newspaper publishers | 15 | 2 | 13.3 % |
| Printing industry experts | 145 | 8 | 5.5 % |
| Media technology students | 384 | 42 | 10.9 % |

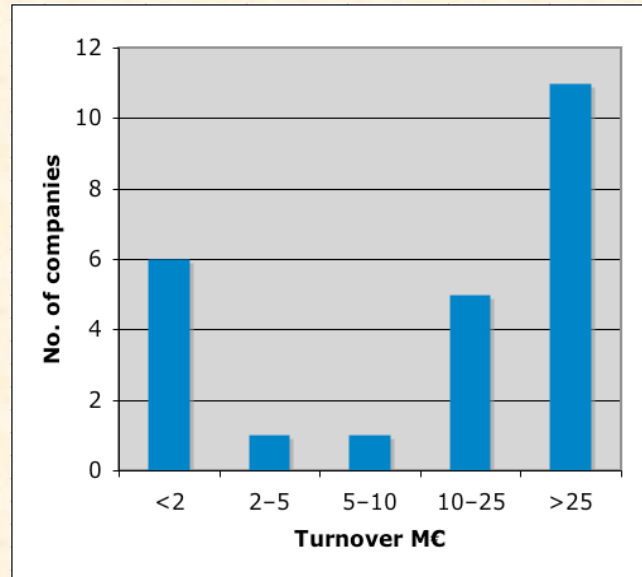
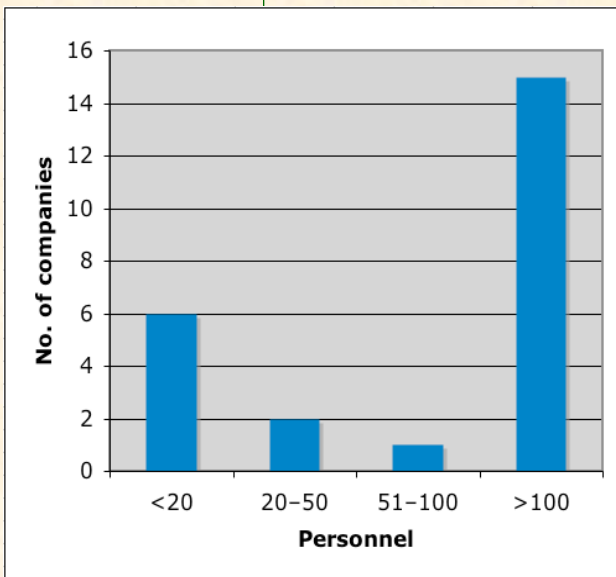
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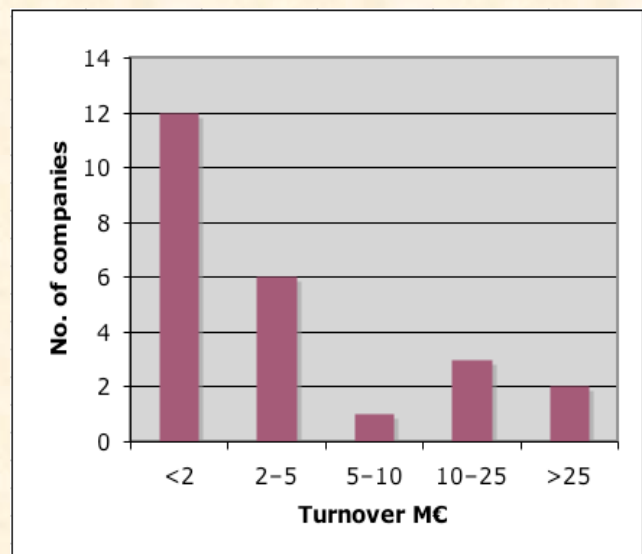
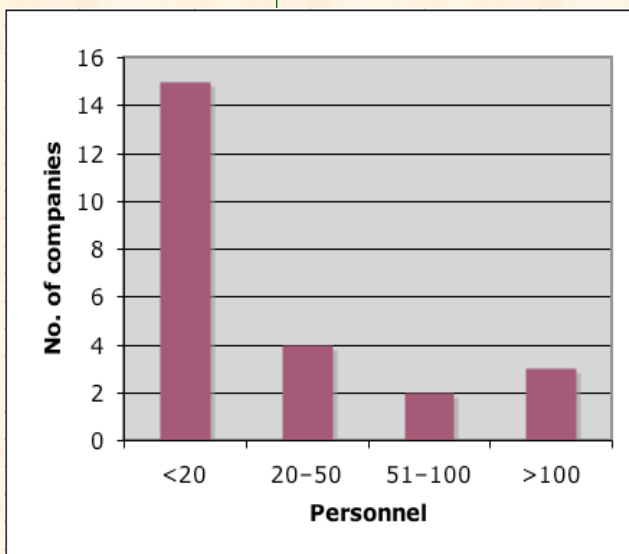
Respondents: Printers



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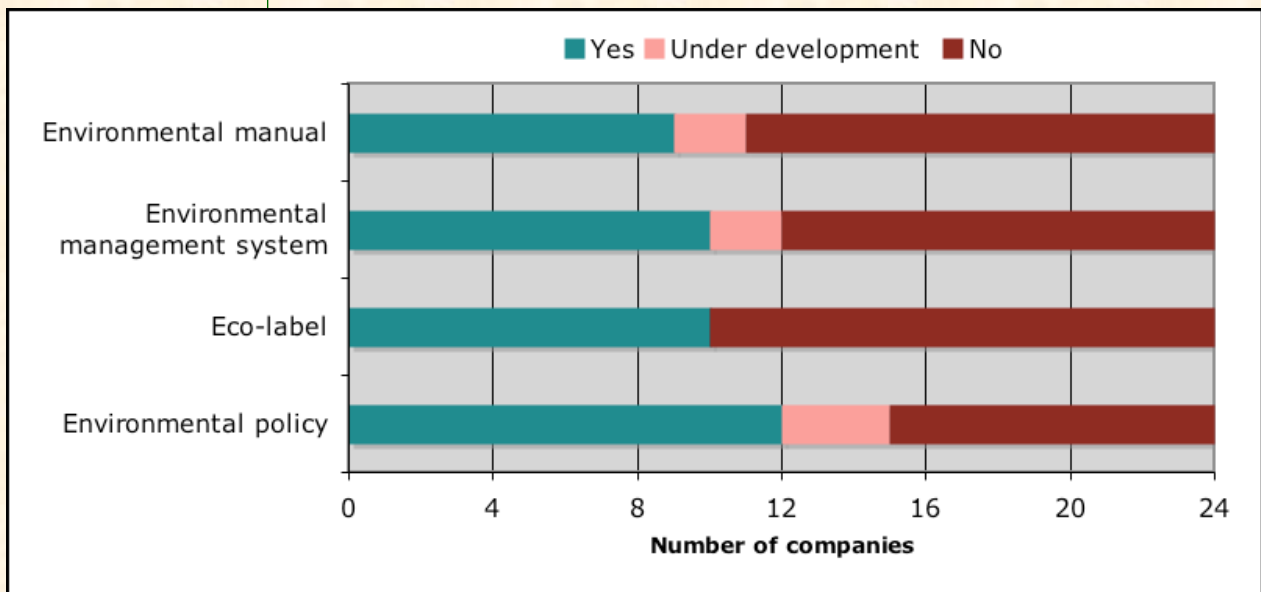
Respondents: Publishers



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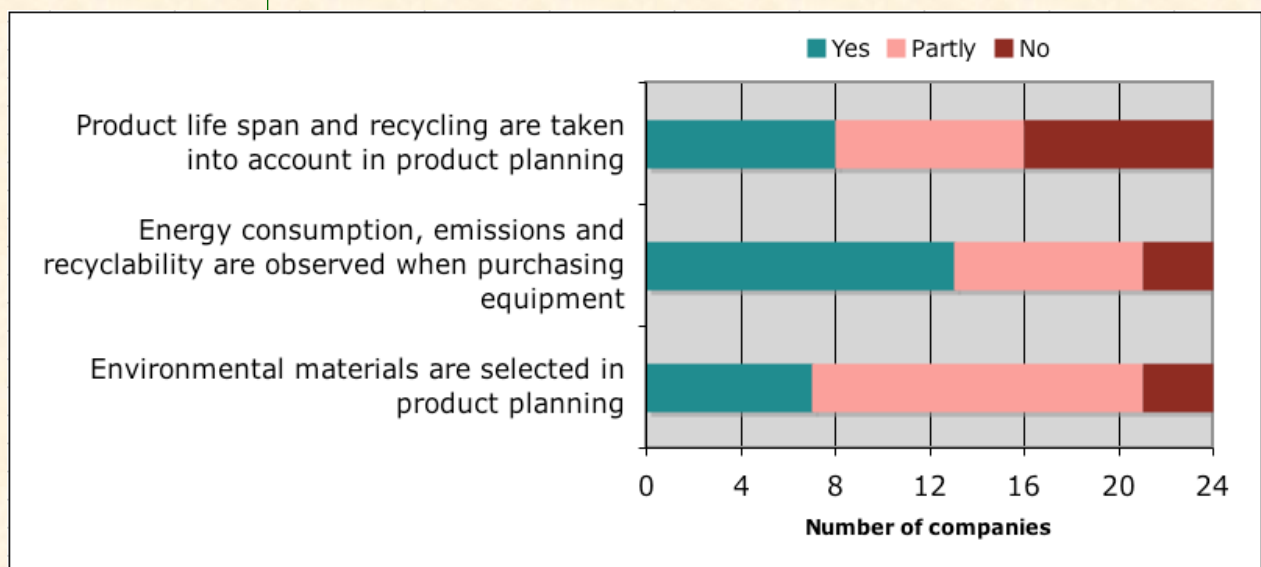
EM tools: Printers



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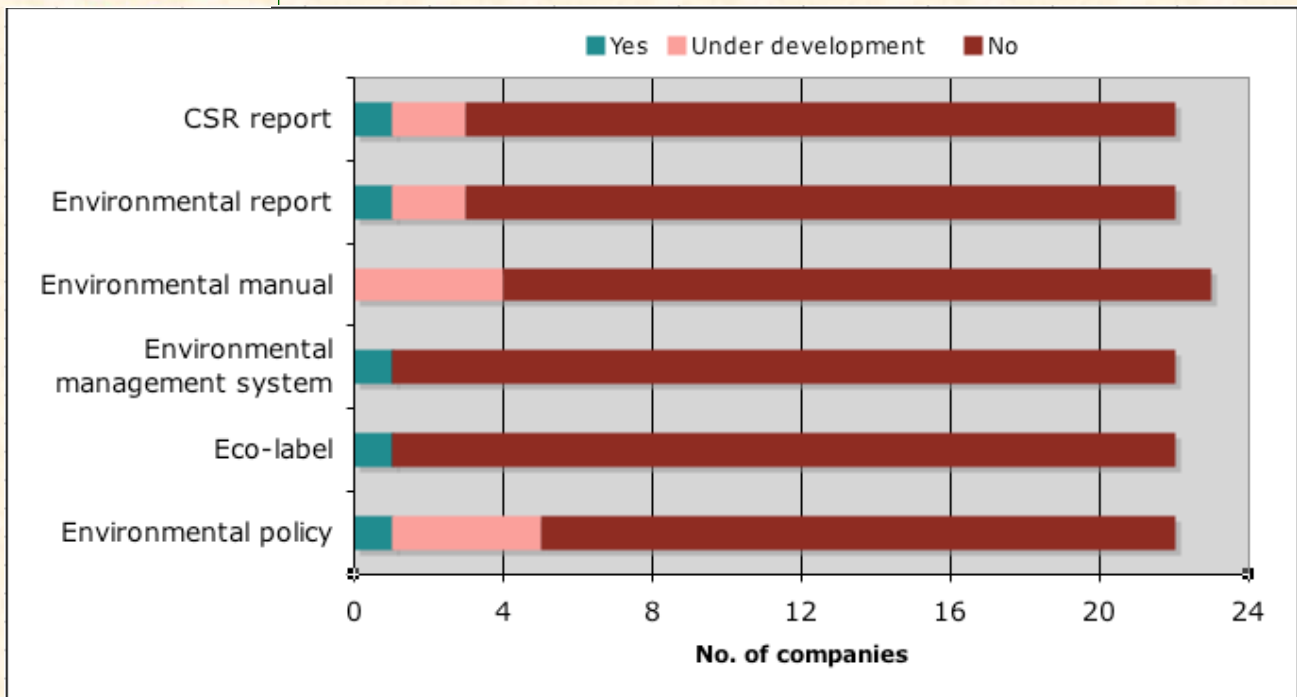
EM action: Printers



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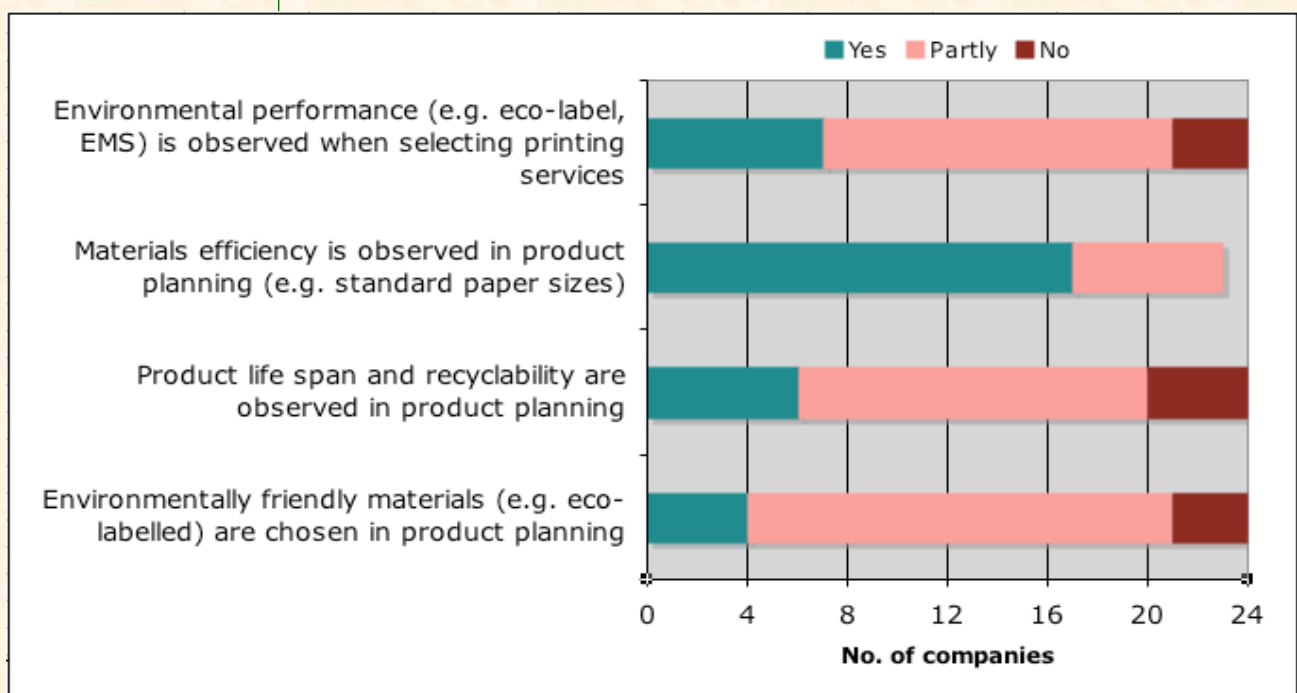
EM tools: Publishers



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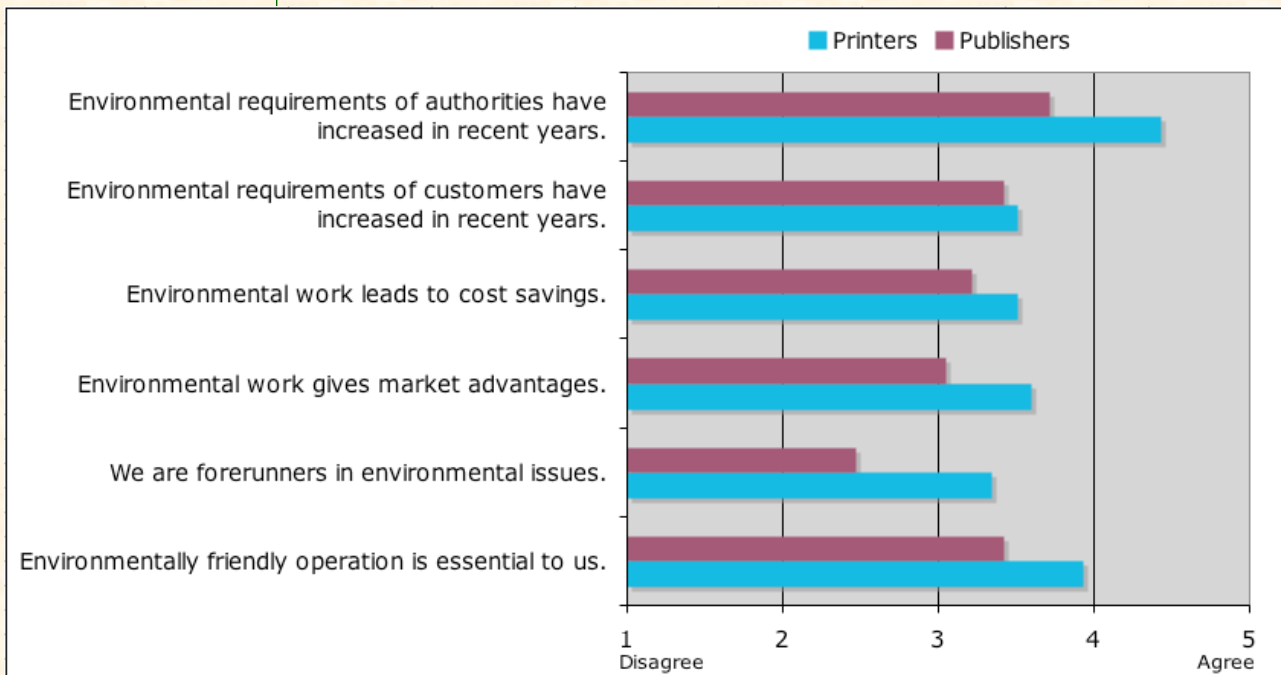
EM action: Publishers



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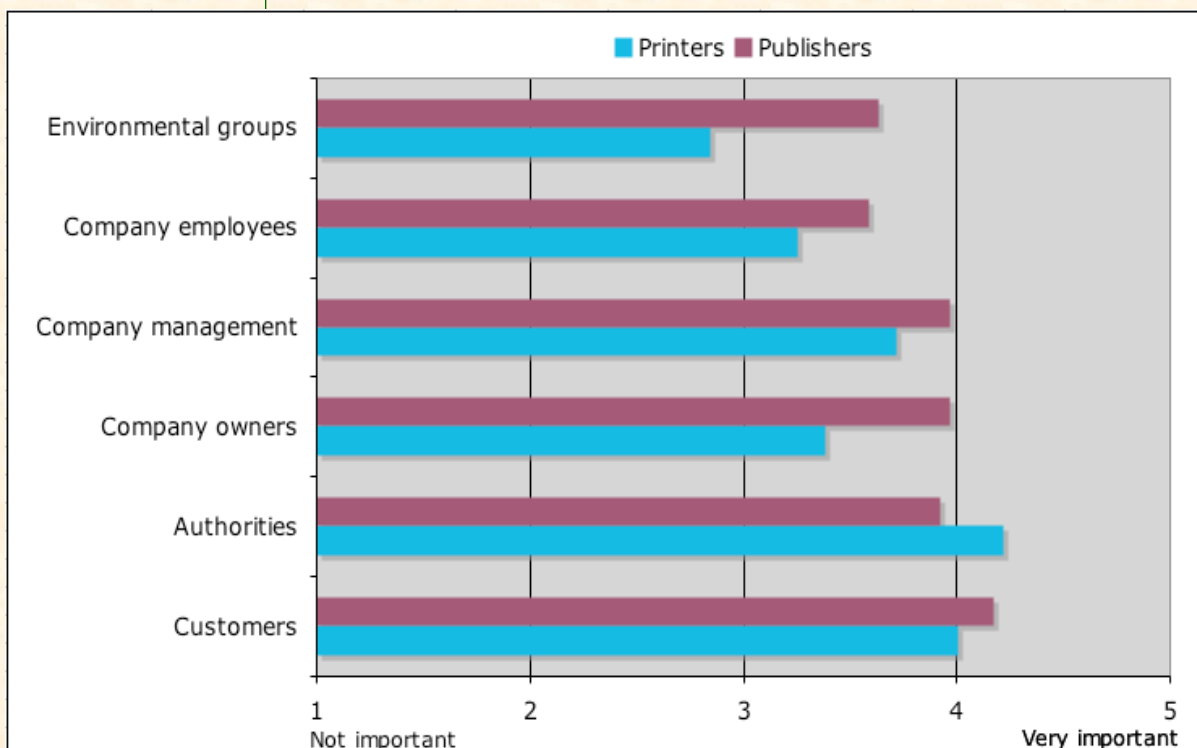
Statements on environmental work



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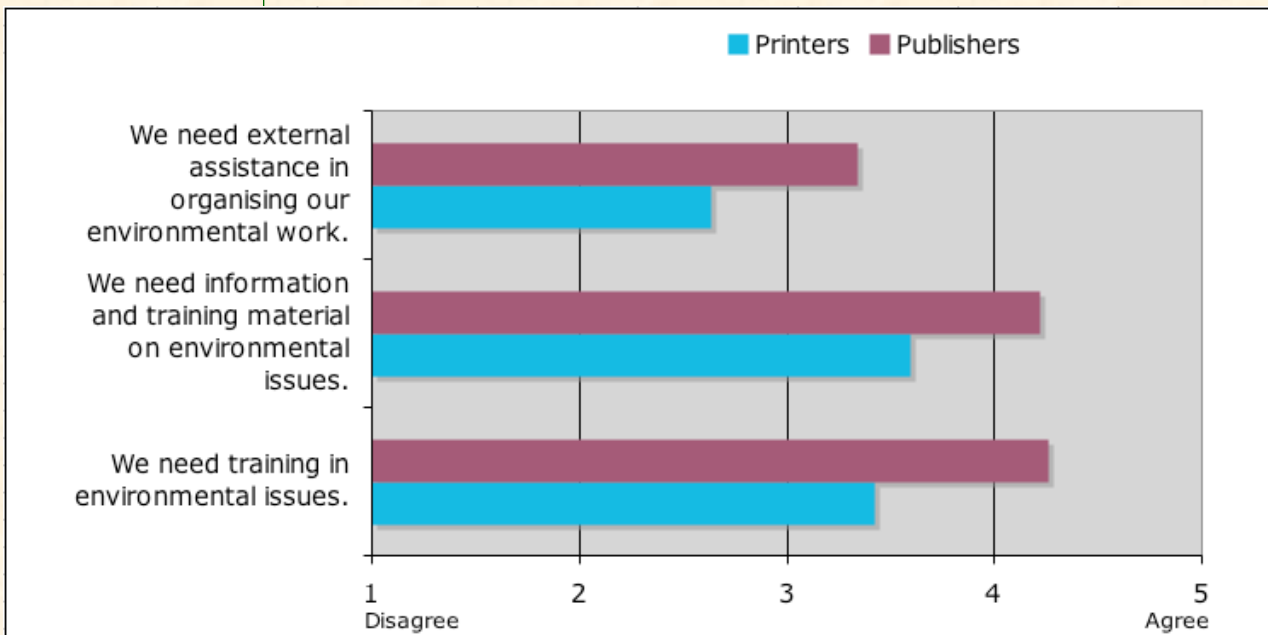


Which stakeholder groups are important in advancing, demanding or encouraging environmental work?





Statements on training and information



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Interviews

- semi-structured
- information-rich cases
 - decision-makers, experts
 - leading companies, trade organisations, associations,
- 15 informants:
 - printing: 6
 - publishing: 4
 - material manufacturers: 2
 - environmental organisations: 3

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Results: Interviews (1) Paper & ink manufacturers

- industry-wide efforts for environmental work
- “one step ahead” of authorities
- environmental groups and authorities seen as drivers

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Results: Interviews (2) Printers

- companies work individually
 - no industry-wide action
- authorities seen as main drivers
- minimal customer demands
- own awareness, knowledge and performance seen as satisfactory
- environmental side-benefits from materials and production efficiency

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Results: Interviews (3) Publishers

- low interest in and awareness of environmental issues
- no customer pressure
 - “readers do not select products on environmental grounds”
- environmental awareness is growing
 - examples from Germany, UK, Sweden, USA

Publishers make the key decisions that define the environmental load of printed products

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Results: Interviews (4) Environmental groups

- concentrate on sustainable fibre supply
- critical towards industry solutions and achievements
- direct and indirect action
 - Greenpeace book campaign
 - readers ⇔ publishers ⇔ paper suppliers (Germany, 1990s)
 - consultation with authorities, companies etc.

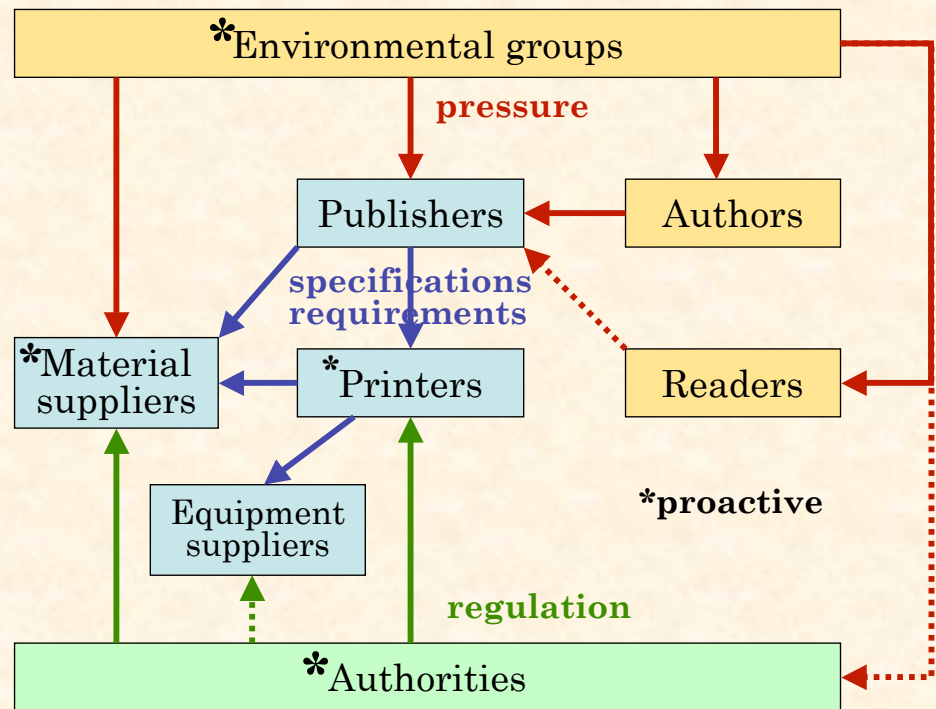
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Roles and mechanisms



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Conclusion

| Drivers | Barriers |
|---|---|
| <ul style="list-style-type: none">• environmental regulation• customer demands• market and cost advantage• ethical awareness | <ul style="list-style-type: none">• no demands from readers• no demands from (domestic) print buyers• lack of awareness and information• SMEs: shortage of resources |

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Thank you!

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