



Perception  
of the wood-based industries  
**Qualitative study**





# Perception of the wood-based industries

Qualitative study of the  
image of wood-based industries  
amongst the public in the Member States  
of the European Union

Final report

Directorate-General for Enterprise

A great deal of additional information on the European Union is available on the Internet.  
It can be accessed through the Europa server (<http://europa.eu.int>).

The modernised web site of the Enterprise DG, Forest-based Industries Unit, can be found at the following  
address: [http://europa.eu.int/comm/enterprise/forest\\_based](http://europa.eu.int/comm/enterprise/forest_based).

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The Enterprise DG of the European Commission has had a qualitative study <sup>(1)</sup> carried out on how the forest-based industries are perceived by the general public of the 15 Member States of the European Union. It addressed adults on the one hand and young people (16 to 18 years) on the other.

This study, which was carried out in close consultation with the various industrial associations in this sector, is of a qualitative nature.

Studies of this type, involving a small number of individuals (in the event, two group discussions each involving about eight people in each Member State), do not aim to produce statistical evaluations but to gain an insight into current views and discover what lies behind them by means of an in-depth analysis of open discussions.

The purpose is not, of course, to replace more specific surveys which may have been carried out or may be carried out in the future, particularly by the industrial associations in the various Member States. Its aim is to complement them.

By identifying and elucidating the key issues, the study highlights the fundamental perceptions and attitudes in Europe, along with the main similarities and differences between the Member States.

The results of the study show there is great **ignorance** on the part of the public and an **image which leaves room for improvement**, particularly as regards respect for the environment, the modernity of the sectors studied and their importance regarding employment and job attractiveness.

□ Regarding the environment, the results show that the important legal measures that have been taken by the EU and the efforts of the different sectors to adapt have not been fully

appreciated – which means that there is need for more information and explanation.

- The realities of sound, sustainable forest management are often seriously doubted by Europeans, who are still great believers in the myth of the original, natural forest. Sweden and Austria are practically the only countries where there is general agreement that foresters do abide by the rules of sound management (at least as regards their national forests); even in Finland this is sometimes called into question. This particularly affects the image of forestry but it also goes beyond that to the industries downstream.
- The subject of recycling is more familiar, but the level of recycling achieved is sometimes underestimated.
- The idea that certain sectors of the industry are highly polluting is generally accepted (in particular the pulp and printing industries); efforts to improve this are not all known or recognised to the same extent.

□ As regards modernity, Europeans tend to think or suppose that the sectors covered by the study have, like other sectors, adopted more efficient production methods and equipment, but the idea of high technology is rarely present. Only the sectors that widely use information and communication technologies in their core activity (printing) or those where the design element plays an important role (furniture and, to a lesser extent, packaging) generally appear truly modern and innovative.

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<sup>(1)</sup> The forest-based industries cover six sectors: forestry; mechanical wood-working industry; furniture industry; pulp, paper and board-manufacturing industry; pulp, paper and board converting industry; printing industry.

There are exceptions to this general rule, in countries such as Sweden and, above all, Finland, where the forest-based industries are, of course, better known and better recognised as high-tech industries (although this does not mean that, as elsewhere, there are not serious misgivings about the industry's contribution to sustainable resource management and environmental conservation).

- As for employment, it is rare for this industry to be considered fundamental in the creation of jobs or, more generally, for the national economy (the case, notably, in Finland and Sweden).

As a place to **work**, the industry is **not** very **attractive**. Apart from the jobs which are presumed to be linked to information technologies or, to a lesser extent, design, the public tends to imagine jobs in the industry as manual, repetitive and unskilled, poorly paid and without any great career prospects. Young people in particular are put off as they see no scope for exercising their creativity.

This **stereotype** no doubt concerns some other industrial activities rather than being limited to forest-based industries.

In the case of these industries, however, the stereotype is linked to the nature of the products (they have always existed) — they are recognised everywhere as useful, even essential to everyday life, and they have not become at all obsolete with the development of the modern world — but at the same time they have become relatively mundane because of their timelessness.

The public also makes little distinction between the different types of product (there are no spectacular 'high profile' products that attract attention and arouse curiosity and interest) and people have only a hazy image of the industries that produce them.

These findings have led the various associations of the forest-based industries to **consider what information and communication measures** they could develop, those which are of common interest to the various sectors and those which depend on the initiative of each of them.

The parties involved in the forest-based industries are now currently examining this issue.

# Introduction

## objectives

## study methods



- **This report presents the results of a study conducted by OPTEM <sup>(1)</sup>, at the request of the European Commission's Enterprise DG, on the image of wood-based industries and economic sectors among the public in the 15 Member States of the European Union.**

The Commission's aim was to help the various sectors of the wood-based industry to pool the steps that they are taking to make the most of their activities and products — one aspect here being **their information and communication strategy**: the purpose of this study was to highlight opportunities and possible options.

- **The topics on which investigations focused (detailed in the guide for group leaders attached as an annex) were mainly as follows.**

- **Spontaneous perceptions of forests, forest products and the industries and economic sectors directly or indirectly connected with forests.**
- **The specific image of a number of the industry's main sectors:** forestry, wood processing industries, furniture industry, paper pulp and paper and board production industry, paper and board processing industries, printing.

The following were explored for each of these sectors:

- spontaneous perceptions and knowledge of the sector
- perceptions of its size and usefulness
- the degree of modernity associated with the sector

- perceptions of its impact on the environment
- perceptions of enterprises in the sector
- the sector's appeal as a potential employer
- reactions to a text presenting the sector, developed by the professional federation concerned (the consultant's role having been to some extent to harmonise the form of these various presentations)

- **The extent to which perceptions changed during the discussions and in response to the information provided, and common and potentially unifying dimensions of the image of the industry's various sectors.**

- **The target public of the study included the following.**

- **The 'average' general public:** adult men and women aged between 25 and 60, in the socio-occupational categories of middle managers, craft workers and small traders, employees and manual workers (excluding people in socioeconomically precarious situations).
- **Young people:** teenagers aged between 16 and 18, from households in the same average socio-occupational categories as the adults questioned, who were already in work or (in most cases) still in education.

People employed or having a member of their household working in an industrial or commercial sector connected with the wood-

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(1) OPTEM, BP 13 F-78950 Gambais.

based industry and its products were excluded from the sample (as were people working for public bodies directly concerned by this industry and woodland owners).

People employed or having a member of their household working in marketing, market and opinion research and communications (advertising, public relations, journalism, etc.) were also conventionally excluded from the sample.

**The sample drew mainly on adults and young people living in large towns and cities.**

- **The study was qualitative and used the focus group method.**

Two group discussions were held in each of the Member States: one for adults and one for young people.

Although this type of study is unlikely to bring out all the results that the industries concerned in each of the Member States would ideally like (several industries in various countries are in fact carrying out their own more specific investigations — any reports forwarded to the consultant were taken into account when preparing this study), it does, however, make it possible clearly to highlight, from the overall European point of view, a number of general comments and problems relating to the sector's image and communications.

Discussions took place between mid-October and mid-November 2001 in the following towns and cities: Cologne in Germany, Vienna in Austria, Antwerp (young people) and Brussels (adults) in Belgium; Copenhagen in Denmark; Madrid in Spain; Helsinki in Finland; Paris in France; Athens in Greece; Dublin in Ireland; Milan in Italy; Luxembourg in the Grand-Duchy of Luxembourg; Amsterdam in the Netherlands; Lisbon in Portugal; London in the United Kingdom; Stockholm in Sweden.

The officers concerned in the Enterprise DG and the industry's professional federations were invited to observe the discussions and had a chance to take part in some of these discussions.

A detailed socio-demographic breakdown of each country's groups is annexed.

- **Optem designed, coordinated and summarised the study**, in accordance with the 'Qualitative Surveys' Framework Contract administered by the Commission's Press and Communication DG.

**The field surveys and national analyses** were conducted respectively by Echanges Marktforschung in Germany, IFM-Karmasin in Austria, Yellow Window in Belgium, Vilstrup Research in Denmark, Escario y Asociados in Spain, Marketing Radar in Finland, OPTEM, with BVA in France, and the Grand-Duchy of Luxembourg, Focus in Greece, MRBI in Ireland, Market Dynamics International in Italy, PQR in the Netherlands, Euroteste in Portugal, Andrew Irving Associates in the United Kingdom, and Valuescope in Sweden (all of which are Optem's regular partners under the abovementioned contract).

# Summary of results and conclusions



The following main observations emerged from the study, conducted in the 15 Member States of the European Union.

1. **Forests** were an emotive issue for many European citizens who tended to see them as the idealised incarnation of a 'virgin' and 'pure' nature, threatened by human activities and especially by economic and industrial activities.

Attitudes towards forests were, however, more detached in some countries where they tended to be seen as 'elsewhere' (in other countries or other continents): this was so in Denmark, the United Kingdom, Ireland, the Netherlands and Italy. More generally, young people seemed to feel less emotive about forests than adults.

It was only really in Finland and Sweden that forests were immediately seen in terms of their economic dimension, and the economic sectors connected with them came spontaneously to mind as essential sectors for the country.

In the other European States, the more products from these sectors were identified (in the subsector of paper as well as in the actual wood industry), the more people's perceptions of these sectors or industries became confused.

2. **Forestry** in particular did not tend to be seen as an economic activity — with the notable exception of Finland and Sweden.

Understanding of the notion that forests are something that needs to be managed was patchy. When people did understand this notion, they tended to interpret it largely in terms of regulatory and supervisory action by public and local authorities (which many people felt, at the same time, to be the main, or even the only, owners of forests).

People were often suspicious about the resolve of (private) forest owners and forest workers to promote sustainable development and respect the 'common ownership' of the forest heritage — suspicions which were particularly marked, moreover, as regards European and other enterprises working in the area of tropical wood.

In the focus groups, recognition of the respect in their own country (but not necessarily elsewhere, even in Europe) of the rules of sound forest management by forestry concerns was widespread only in Sweden and Austria; this was mirrored to some extent in Finland, although there was less consensus; there were doubts, ranging in strength, in all the other countries.

Apart from Finland and Sweden, and to a lesser extent, Austria, forestry was also seen as traditional and not very innovative and, even in these three countries, its appeal as an employer was low or very low. When the notion of modern methods and techniques was advanced in this respect, it tended to evoke the spectre of gigantic felling machines, led by profit and blindly destroying everything in their path, rather than ecologically responsible techniques.

This negative stereotype is obviously a particular problem for forestry sector communications; however, it also affected, albeit to different extents, the sectors downstream of this sector, which people tended to feel were just as responsible for destroying forests.

3. Many Europeans had very hazy notions of **wood processing industries**, in terms of their coverage (some people, for instance, included paper-making industries and others did not), the precise activities of these industries and their production processes.

While people tended in general to understand what sawmills were and what they did (but did not always clearly differentiate them from forest management), the various industrial activities downstream of sawmills formed a kind of badly differentiated whole in many people's minds (with the exception of the furniture sector). People were not in general very aware of the notions of production lines or sequences involving various stages of production, or of processing industries.

People felt that these industries were important because of the usefulness of their products, but their importance for the national economy was perceived in very different ways in different countries: although they were not felt to be marginal or minor, they were not, except in the two Nordic countries which are highly dependent on woodworking activities, seen as major and highly visible industries.

Although they were felt to have a traditional dimension everywhere, their image was not outdated or archaic because it was assumed (rather than known) that they, like other industries, had had to adapt and adopt new techniques and new production equipment — and that this development had been gradual and had not involved spectacular revolutions or changes.

Their impact on the environment was seen as moderate (although their indirect responsibility for the perceived destruction of the forest heritage was criticised here and there).

Perceived as industries that continue to be traditional in nature, with an image of manual, repetitive and unskilled jobs offering few career prospects and leaving little scope for personal initiative and creativity, they did not have much appeal in terms of employment.

4. **The furniture industry** was much more familiar — logically for a sector which concerns a specific product that is a necessity in everyone's life.

Its inclusion among industries connected with forests came as no surprise, although in some instances people pointed out that the industry also used materials from other sources. This was undoubtedly due, to some extent, to the logic of the discussions — it had been announced as one of the components of the industry and not independent from it; nevertheless, a long tradition of woodworking was one of the factors in the standing of this industry.

Another major factor in its standing, i.e. the dynamic nature that it was felt to have, was connected with its acknowledged ongoing innovative ability in terms of style and design, including the use of materials less noble than timber by the growing, and nowadays predominant, segment of mass production, accessible to all, supported by very intensive marketing and advertising campaigns.

The furniture industry was therefore highly visible among the public who were able to name enterprises — although it was clear that it was (large) retailers who possessed this renown, rather than production whose perceived economic importance varied from one country to another.

There were few criticisms of this sector from the point of view of its impact on the environment which was seen as neutral or slightly adverse (at least when its main material was considered to be wood, as followed from the sequence of discussion topics). Like any other industry, it is not possible credibly to claim that it is beneficial for the environment nor to make the consumer (as the presentation text submitted to the participants appeared to be trying to do) ethically responsible for choices of materials such as tropical woods that may be of harm to the environment.

Without being very high (this was still 'industry' as disparaged by young people in particular), it had much more appeal as an employer than other sectors of the industry especially in the areas of design and production, and marketing and publicity, jobs.

5. Seen largely through the finished products manufactured by its downstream processing industries, the **paper pulp and paper and board manufacturing industry** seemed unknown as a specific economic sector, yet paradoxically had an image of environmental harm and destruction.

Its usefulness — that of its products — was widely acknowledged; its importance for the national economy, although considered fundamental in Finland, was felt to be high or very high in some other countries; in most cases this was based on intuitive assumptions since citizens did not in general know any of its enterprises.

Its modernity, seen more in terms of process than product innovation (very large and high-performance production machinery came to mind), did not go as far as making it into a high-tech industry, except in the eyes of the Finns.

The environmental impact of this industry was in most cases felt to be negative or very negative: there was a strongly rooted notion in some groups that it was helping to destroy forests through its enormous consumption of wood and also, and in particular, as a result of the water or air pollution that it was thought to cause, an idea that was widely held in several northern European countries in particular. At the same time, it was in these countries that people were most aware of the efforts being made to improve this situation (recycling, reuse of waste, research into less harmful chemical processing products) — but the improvement was seen as partial and gradual, making it impossible for this industry to present itself to the public as a player in the safeguarding of the environment; here, as in other sectors, credibility depends on modesty.

The appeal of the paper pulp and paper and board manufacturing industry as an employer was very low: images of heavy industry, monotonous tasks, low-skilled jobs, polluted and foul-smelling work environments were felt to be very off-putting, especially for young people.

6. **The paper and board processing industries** were a hazy notion for many people who were basically unable to differentiate them from the sector immediately upstream, which has just been discussed.

Here again, once this initial haziness had been dispelled, the importance and usefulness of this sector, about which people knew very little and whose enterprises, and economic importance, were largely unknown, tended to be assessed in terms of its products.

Packagings were its most visible products and were felt to be useful, although there were also criticisms of excessive use and inadequate recycling.

People were fairly willing to believe that these industries were innovative, in terms of both products (new types of packaging, new materials in some cases) and production machinery.

Perceptions of their environmental impact led to only moderate criticisms — they were not, however, free from criticism.

Their appeal as an employer was low, despite the fact that some people had a relative interest in product conception and design; the general

reservations about work in industry (manual, repetitive, unskilled) were repeated here as well.

7. The final specific sector covered by the study, i.e. **printing**, seemed very familiar and highly thought of in comparison with the others.

The sector profited in particular from the high standing of books and the press, which impart information, knowledge and culture — and from a partial confusion with the publishing sector. The development of the information and communication technologies did not prevent, moreover, the written medium from being considered indispensable, despite some discussions of this issue among the younger people.

Printing was felt nearly everywhere to be extremely modern, dynamic and innovative; its integration of information technologies was a key factor in this, together with an image of extremely high-performance and rapidly evolving production equipment.

People knew little about its quantitative importance in the national economy, but the function, both economic and social, of the 'pulse' or prime mover of society that it was felt to possess was acknowledged everywhere.

The industry's environmental impact was its weak point; many people had heard, with varying degrees of accuracy, about the polluting and even toxic effects of the inks, colouring agents and other chemical products that it uses.

Criticisms of the industry in this respect were, however, relatively temperate: either because, in some countries (in particular in northern Europe), people had heard about the development of non-polluting water-based products, or because, as it is much more remote from wood as a raw material, it largely escaped the criticisms of direct or indirect damage to forests, or because the very dynamic and positive aspects of its image curbed the temptation to make it responsible for all evils.

Its appeal as an employer was much greater than in all the other sectors studied, because of its perceived dynamism and in particular the importance of the information technologies in the sector: young people in particular considered that it had 'noble', intellectual and career-advancing conception and design functions — although the industrial part of its production had little advantage.

8. The industry's various sectors seem to have **image problems that are to some extent shared**.

- The lack of understanding, or the low-level credibility, of the argument of sustainable and responsible management of forests by enterprises with economic aims is obviously of concern for forestry in particular (especially activities involving tropical woods), but it also affects, by association, downstream sectors of the industry.

The extent of the 'joint responsibility' attributed to these sectors for the 'destruction' of forests depends on the assumed size of their wood consumption and on the 'wastage' that is subjectively attributed to them.

The paper industries are the main targets: upstream, the pulp and 'crude' paper production industry and, downstream, the paper and board processing industry, tend to be criticised for encouraging consumers to waste paper as a result of excessive packaging. In some cases, citizens also mentioned the inadequacy, in their eyes, of recycling. Only the Finns seemed to be very aware of the extent of the use of production by-products, seconds and waste.

Although there is less criticism of the wood-working sectors (including furniture), they do not escape it completely.

Only printing, less associated with wood as a raw material, is largely free from criticism.

In these circumstances, it seems to us that the sectors of the industry would do well to design coordinated communication campaigns in this respect. In the case of forestry, the first step needs to be to make people more aware that forests are cultivated areas that are and need to be maintained and that the area occupied by forests in Europe is not decreasing, but growing (while taking pains at the same time to counter accusations of a concentration on rapid-growth species and a lack of concern for biodiversity); the other sectors in the industry would also benefit from a communication campaign of this kind which they could put to good use themselves.

- Another important theme in relation to the environment, i.e. the image of polluting activities, concerns the various sectors in

very different ways: particularly the paper pulp and the paper and board manufacturing sector and the printing sector, and the other sectors to a much lesser extent.

In this respect, the sectors undoubtedly each have to develop their own approaches in relation to the specific problems that they encounter: pollution by bleaching agents or 'chemical substances' used to produce pulp and paper; by inks, colouring agents and other chemical products with varying degrees of toxicity used by the printing sector; by glues, varnishes, paints and solvents used in the furniture industry and other wood processing industries; the problems raised by the recycling of some packagings, etc.

The problem that the various sectors share has less to do with the substance of arguments than with their form.

Participants' reactions to the texts presenting the industries clearly show that these industries cannot, as matters stand at present, credibly claim that they are contributing positively to the environment — including in countries, principally Finland, where there is a strong 'culture' of wood and its applications, and where people are fully aware of the industry's importance for the country.

Any industrial activity is seen (to varying degrees) as polluting by essence. Care should be taken here not to overstress statements: a tone of self-satisfaction tends to strengthen suspicions when the sector is perceived, even moderately, and even wrongly, as guilty and responsible. It would be better to take a more moderate approach and show ways in which attempts are being made to reduce damage to the environment — supporting arguments with accurate facts.

- A general problem that is also common to most of the sectors is that they do not have a very innovative image or their image as modern industries has little appeal when the perceived signs of this modernity are mechanisation, automation and gigantic production machinery.

There are few exceptions (Finland, Sweden and to some extent, Austria, in the case of forestry; Finland in the case of the pulp and paper industry, this being the only country where pulp and paper-making is really seen

as a high-tech industry) – outside specific conception or design functions.

The reason for these perceptions is to some extent common to the various sectors. Although wood is highly prized as a raw material, as is paper, they are traditional materials in that they have ‘always existed’.

Citizens are not sufficiently aware that they lend themselves to major product innovations, highly technical applications, and even spectacular achievements.

It would be in the interests of the industry’s various sectors to make these better known, and thus to combat the tendency to consider their products to be banal; even though they are fully acknowledged as useful, or even indispensable, they arouse little active curiosity or interest.

- This is reflected in the low or very low appeal of almost all the sectors as employers.

One of the reasons for this is undoubtedly the general disaffection with industrial jobs; the image of work in the wood industry sectors continues to be one of manual, unskilled, badly paid jobs offering few career prospects and leaving little scope for people’s creativity.

The only notable exceptions are conception (linked in particular with the new technologies) and design in printing, furniture and, to a lesser extent, packaging.

The industry’s sectors must, if they are to become more attractive, provide information on the range of jobs that they offer at the different qualification levels in order to break away from this stereotype.

There is little doubt that there is scope here for schemes common to several, if not all, sectors (overall, the paper sector requires competences and qualifications that are relatively similar, as do all the wood sectors); more generally, exchanges of experiences of campaigns already conducted in this area could also be useful.

- The last point that seems to affect all the industry’s sectors is the major lack of awareness of their enterprises and the actual nature of their work (with the notable exception here of Finland).

The public has particularly hazy ideas about firms working in inter-enterprise markets, whose products ‘do not speak’ for themselves.

Enterprises producing finished products bought by the public are not much better off: people may know brands (of producers or, in the case of furniture in particular, retailers), but it is only rarely that people can identify, and are aware of, producer enterprises themselves.

Information is needed on their diversity, originality and success in order to combat the monolithic perceptions that often hold sway.

There is also food here for common thinking to make people more actively curious and step up appeal.



## Detailed results





# Spontaneous perceptions of forests and forest-related products, industries and economic sectors

## 1. Spontaneous perceptions of forests and forest-related products and applications

- The introductory theme of the discussions related to ‘forests, forest-related products, and the uses to which they can be put’. Group participants were invited to discuss the ideas and impressions that came to mind.

Analysis of the initial discussions on this theme offer a useful opportunity to identify the general psychological context shaping people’s subsequent perceptions of the various sectors of the industry.

The main perceptions put forward were as follows.

- **A feeling of proximity and an emotive reaction to forests varying greatly from country to country.**

The feeling of proximity was strongest in Sweden, and perhaps even more so in Finland; forests were seen there as a fundamental component of the country’s identity and as a familiar element of everyone’s daily environment (at least sentimentally among the town and city dwellers taking part).

The theme of the forest also held a highly emotive charge in Germany and Austria: the myth of an ideal forest nature was deeply rooted; a myth that is, however, somewhat remote for the inhabitants of the large cities of Cologne (who referred in particular to the forests of southern Germany) and Vienna. In France as well, and to a lesser extent in Luxembourg and Belgium, there was an idyllic image of forests as the natural environment par excellence; despite being

much more remote from people’s daily lives, this dimension was also to be found among the Portuguese, Greeks (thinking of the forests of northern Greece) and Spanish (at least among adults, who had retained an emotional attachment to their original provinces and villages, even if they had in most cases been resident in Madrid for a long time).

Citizens of the other Member States of the Union tended, however, to see their country as largely lacking forests; even though in some cases they also brought up the myth of nature, for them forests were obviously something remote: to be found chiefly in foreign and often far-off countries (rain-forests, Canadian forests, forests in the countries of northern Europe for those living in the south — the Danes also mentioning their neighbour, Sweden): this was true of many of the participants in Denmark, the Netherlands (where the existence of a national forest was mentioned, but stood out as an exception), Ireland, the United Kingdom and Italy (where people tended to contrast ‘woods’, considered to be of limited size, and familiar, with ‘forests’ considered to be very large areas existing only elsewhere — the Italians from Milan forgetting in this respect the Alpine forests, a substantial proportion of which lie in their own country).

**In several countries, the young people taking part seemed to have fewer psychological and emotional ties with forests than the adults:** this was very clearly the case in Spain, although similar signs could also be seen in Denmark, the Netherlands, Belgium, France, Italy and Portugal.

- **The environmental dimension was always explicit or implicit.**

**Depending on the case, this was expressed:**

- **in a more emotive way:** forests being perceived as living natural environments with a natural balance of trees and other plants, berries, mushrooms and animals; forests offering people an opportunity to relax and return to their roots in a 'pure' environment where urban dwellers could go to fill their lungs with clean air;
- **in a more ideological way:** here the emphasis was on the ecological aspects of forests as carbon filters, helping to limit the greenhouse effect and climate change, on a worldwide rather than a local scale.

The emotive perception was more frequent in countries where people felt closest to forests, and the ideological perception in the other countries.

Discussions of an ideological nature also tended to be more common among the young people than among the adults (very clearly in Denmark, Austria, the United Kingdom, the Netherlands, Luxembourg, France and Greece).

- **Different spontaneous perceptions of the economic dimension of forests.**

This dimension was immediately put forward by the Finnish participants, for whom forest-related activities were an essential part of the national economy; their Swedish neighbours also stressed their economic importance.

Economic activities connected with forests or the products obtained from forests were also mentioned spontaneously in Austria, Belgium, Luxembourg, France and Portugal, but were rarely mentioned, at least among participants' initial perceptions, in the other Member States (apart, for instance in the Netherlands, from references to forest working in other regions of the world).

In general, participants' views on this theme tended to come from thinking about forests (or their perceived absence) in their own country. There was no mention in particular of the notion of a 'European forest'.

- **The notion that forests are a declining or threatened universe was widespread.**

**This decline, or threat, was attributed to the following.**

- **In the first place, to forest-related industries and economic activities,** which use forests as a raw material and which, in many people's minds, 'exploit' them (in the pejorative sense of the term), causing their disappearance or at least their progressive reduction.

This idea was very widespread in most European countries among both the young people and the adults. **The felling of trees was associated with the notion of the destruction of the heritage,** whether this involved tropical rainforests or national forests — except, in the latter case, in Sweden (where many people were aware that the tree plantation area was increasing), Austria (where there was no feeling of destruction of national forests) and, to a lesser extent, some other countries where it was accepted that the management of forest expanses needed to be better monitored and supervised (Netherlands, France and Ireland, where recent government measures to promote replantation were mentioned); this was supplemented by the notion of 'single species' replantation exclusively involving conifers (in Germany). Even in a country such as Finland, where people were aware that forest working goes together with replantation, some people doubted that such replantation would make up for the losses.

**The notion of pollution by forest-related industries was put forward by participants in several countries** and varied in strength depending on the importance of forests for these countries (Finland, Austria, Ireland, Luxembourg, Portugal), as well as the notion of wastage of this natural resource (Denmark) — even though it was subsequently accepted that these were not the most polluting industries.

The growing importance of recycling was mentioned positively in this respect (in Sweden, Denmark, Austria, Ireland, Belgium, Luxembourg, Spain, etc.) – in particular in the young people's focus groups.

- **In some cases also through urban growth:** among participants in the Finnish groups (who were aware of, or believed they were witnessing, the disappearance of forests in the immediate vicinity of Helsinki), the Irish groups (who noted the major expansion of the urban conurbation of Dublin) and the Greek groups (who bemoaned forest fires, which they suspected were organised by economic interests responsible for the disappearance of the last wooded areas around Athens).
- **In the countries of southern Europe, by the calamity of forest fires,** that people in France, Spain and Portugal as well as Greece tended to consider were not just down to chance (an issue that was also brought up by some Belgians).
- **Wooden joinery products and internal or external fittings** were in some cases also expressly mentioned at this stage, in groups in various countries (wooden flooring, doors and windows, wooden panelling, fencing, etc.)
- **The manufacture of chipboard** was, however, only rarely mentioned.
- **Various wooden objects or applications using wood as a material** were also mentioned here and there: wooden tools, matches, pencils, clothes pegs, toothpicks, costume jewellery, musical instruments, wooden crates or pallets, construction of boats, etc.

- **That wood is the raw material used to produce paper.**

- **Paper was generically mentioned, without any further details, in some groups**

Paper pulp was hardly ever mentioned (except in the Nordic countries which are major producers).

Board was rarely spontaneously mentioned.

- **In other groups, participants gave further details of the products and applications of paper that they knew:** in particular as a writing medium (notebooks, notepads, greetings cards, envelopes, etc.) or a printing medium (books, newspapers, magazines, in some cases advertising posters).

Paper (or board) was much less frequently spontaneously mentioned as a packaging material.

Products made from non-woven material were occasionally mentioned at this stage of the discussion (toilet paper, tissues, kitchen rolls or 'paper' tablecloths and napkins were mentioned in some Danish, Austrian, Spanish and Portuguese groups)

- **In some cases, the following uses of wood were also mentioned.**

- **Wood for heating.**

## 2. Forest-related products, economic activities and industries

- As mentioned above, the spontaneous discussions of forests tended to include, although to varying degrees in different countries, references to forest products and forest-related economic activities.

People knew the following more or less clearly everywhere.

- **That wood, as a material, is used for applications that were put forward with a degree of detail that varied** from one group to another.
  - **Furniture** was the type of product mentioned most frequently and spontaneously (in more or less all countries and all groups).
  - **The construction of wooden houses (chalets)** was mentioned in the Nordic countries in particular.
  - **Timber**, as a construction resource, was explicitly mentioned in these same countries and in the groups in some other countries (Austria, Ireland, Belgium, France, Spain, etc.) — it was clear, however, that not all Europeans were spontaneously aware of the uses of wood in this field.

- **Source of specific products:** cork (in Spain and Portugal), resin (in Portugal and Greece where various by-products were envisaged), active principles of pharmaceutical, cosmetic or chemical products, rubber, viscose as a textile fibre (Sweden, Belgium, etc.)
  - **Christmas trees were fairly spontaneously mentioned as a forest product in a number of countries.**
  - **In some cases, participants also mentioned the mushrooms, fruit or berries that can be gathered or found in forests as well as hunting and game** (Sweden, Austria, the Netherlands, Belgium, Luxembourg, France, Greece, etc.)
  - **In some cases forests were also seen as places for relaxation or for tourism** (in particular in Finland, Germany, Austria, the United Kingdom, the Netherlands, France, etc.).
- **While wood products or by-products tended to be fairly well known and were often appreciated** (for their natural nature, warmth, or practicality for daily use), **the industries connected with these products and with forests were generally perceived in a fairly confused way** – as will be seen in detail in the following chapters.

Apart undoubtedly from Finland and Sweden where their importance was known and various sectors of the wood industry were mentioned, the people questioned only really cited, with different levels of spontaneity, the paper industry (as an undifferentiated whole), the furniture industry and in some cases sawmill activities (but had no clear perception of the existence and specific activities of the various sectors or subsectors making up the line or industry).

**For a majority of the Europeans taking part, it was therefore clear that the wood-based industry and its sectors were not very visible and had little impact in people's minds.**

# Image of forestry



- **A number of general observations emerge from an analysis of the spontaneous reactions of focus group participants**, when asked what they knew about forestry and what ideas and impressions they had about it — bearing in mind that it was specified that they should be asked to think about ‘the economic activity of forestry or forest working providing the products used in the various applications’ that they had just been discussing.
- **In many countries**, despite this precision, **the people questioned found it very difficult to envisage forestry in terms of an economic activity.**
  - This was particularly true in Germany, the United Kingdom, Ireland, Belgium and Luxembourg, and among some Austrians and Greeks.

In these countries, people tended to think, when discussing forestry, chiefly of the function of safeguarding forests, seen essentially as a public good threatened to varying degrees and which must at all costs be defended, and the responsibility of the public authorities in this respect.

Here, the emblematic role of the forest ranger or ‘forest police’ was mentioned, this role including the general surveillance of forest areas, the detection of diseased trees that need to be felled, replantation measures, the protection of fauna and the natural environment in which they can survive and flourish, forest ‘cleaning’, marking out and maintenance of forest paths for walking, or the development of forests so that fires can be more efficiently controlled (Greece).

The notion of working of forests in order to obtain wood as a raw material for the products mentioned in the previous discussion theme was almost absent – at least as regards national forests (although the same did not apply to tropical rainforests in the countries of the Third World).

The perceived actors of forestry were the ministries or public departments concerned, and in some cases even environmental organisations.

- In contrast, it was only really in Finland and Sweden that forestry was immediately seen as an economic sector, in the full sense of the term, and as an important sector, even though here as well the public authorities had a role to play by imposing rules, by supervision and by offering incentives, in particular as regards replantation.
- In the other European countries, there were intermediate positions, forestry output being viewed as relatively important (in France, Spain (in some regions of the country) and Portugal) or of low or even marginal importance for the country (Denmark, the Netherlands, Italy); regulatory action by the public authorities was felt to have been implemented to different degrees (rather less than more in the eyes of the Spanish and Portuguese as well as the Greeks).
- **The idea that forests are or should be managed was clearly perceived** (except among some participants, particularly large in number in Italy, for instance, who tended to imagine that forests renew themselves without

human intervention). **However**, leaving aside some countries in which this sector is an important economic activity and was recognised as such, **it was felt that the main purpose of this management was to prevent or limit damage by man and by economic interests.**

- **Considered as an economic activity, forestry was, in this context, generally viewed with suspicion.**

For many people, the notion of private interests clearly conflicted with the notion of forests as a national public good and the utilitarian notion of forestry ran counter to the mythical image of 'natural' forests.

This led people to call into question forest over-exploitation; their feeling was that operators undertook replantation only when they were compelled to do so, or attempted to evade regulations laid down in this area, or cultivated single and profitable rapid-growth species to the detriment of a 'natural' balance.

These feelings varied in degree and also varied depending on whether people were thinking about the situation in their own countries or in tropical countries (for which they were widespread); they seemed particularly marked in the countries of southern Europe, but were to be found almost everywhere, apart from Sweden, Austria and among a proportion of the Finnish sample, among whom the notion of sound and responsible forest management was widespread (although there were doubts in Finland, especially among the young Finns).

- **Very little was known in practice about forestry activities.**

This work was symbolised chiefly by the felling of trees, and very few people had more detailed ideas — except in the Nordic, major producer, countries.

What people knew or what they believed they knew about forestry came from various sources, but rarely from the forestry sector itself, except in Finland and Sweden where people tended to be well informed at an early stage at school.

The media — especially television — were often cited, with 'environmental' documen-

taries denouncing over-exploitation and the lack of responsible management, especially as regards rainforests.

This was supplemented by the 'observation' by adults of the disappearance of wooded areas when they compared the situation of their local environment (or the rural area where they had grown up) in the past with the situation today.

- **The image of forest owners was often marred by inaccuracies and haziness and, in the case of private owners, was rarely spontaneously positive.**

- **The State and the local authorities were often perceived as the main owners of forests, in some cases together with other non-profit-making institutions.**

Without ever having thought much about it, the Germans, British, Irish, Italians and the young section of the Spanish sample tended to see local authorities as the main owners of most, or even all, national forests.

In all the other countries (except Greece), they were also believed to own a substantial proportion of forests, together with the Crown in the Netherlands, Luxembourg and Greece and the Church in Sweden, Austria and Greece.

- **In people's minds, private owners included the following.**

— **Large landowners** (rich, aristocratic, etc.) were mentioned in Denmark, Austria, the United Kingdom, Portugal and Greece.

— **'Investors'**: major enterprises exploiting forests in order to maximise their profits (mentioned in Denmark, the United Kingdom, the Netherlands and Portugal).

— **Small and medium-sized owners** in Sweden and Finland (everyone), and in Austria, Belgium, Luxembourg, France and Spain (adults).

**There was little sympathy with the former ('landowners' and 'investors'): the latter were in most cases perceived in a very hazy way.**

□ The participants were asked for their opinions on **the importance and usefulness of this activity.**

- **There was a consensus everywhere recognising and stressing the importance of sound management of forests, perceived as part of the heritage** — i.e. often of conservative and protective management threatened to varying degrees by the appetites of economic interests.
- **The importance of forestry in economic terms was spontaneously felt to be great only in Sweden and Finland.** Some of the adult Spanish group also acknowledged that forestry played a substantial role in the economy of some regions where it continued to be a specialisation (furniture, cork, etc.). The Austrians also tended to attribute some importance to it, but felt at the same time that it was not an activity that was profitable in itself and had to be subsidised with public money.

**It was not felt, in the other countries, to be a major economic sector: in some it was clearly felt to be marginal:** Denmark, the United Kingdom, Ireland, the Netherlands, Italy and Greece (although its importance in other countries was acknowledged).

**There were few doubts about the importance and usefulness of wood by-products, but these were largely products that ‘went without saying’ and were rarely spontaneously present in people’s minds.**

□ **The extent to which this sector was seen as modern and innovative or, in contrast, as traditional, was also assessed.**

- **The traditional image was very prevalent in many countries:** Germany, the United Kingdom, Ireland, Luxembourg, France, Italy, Spain and Greece, and among the young Danes and Belgians.

At most, it was accepted, or assumed, that this activity must have had to change like other activities, and that it was nowadays using more up-to-date tools and equipment, but these were generally no more than assumptions and did little to change the deeply-rooted nature of people’s perceptions.

- **More generally, this traditional image tended to be in people’s minds in other**

**countries or other groups,** as a result of the ‘timeless’ nature of an activity that had always existed; **here, however, people were more aware of the fact that the activity had undergone major modernisation.**

This was true of the Danish and Belgian adults and the Dutch and the Portuguese, but this perception did not necessarily go together with a positive image (vision for instance of ‘gigantic felling machines’ and ‘rows of trees stretching to infinity’).

- **It was only really in Sweden and Finland, and to a lesser extent in Austria, that there was a positive image of the sector.**

Here, people mentioned not only modern and high-tech production equipment, but also the use of information technologies and scientific research to ensure the correct ecological balance of forests, etc.

□ **Perceptions of the environmental impact of forestry were ambivalent** and shaped by the various perceptions discussed above.

- **When forestry was seen chiefly as an activity to manage the heritage by the public authorities or under their supervision, it was almost always seen in a positive light.**

A number of Greeks had strong reservations about public authority action in this area, and a number of Spaniards criticised ‘inaction’ by the national State (while praising, in contrast, action by the autonomous regions).

Positive perceptions of forestry and the environment were heightened by the ‘ecological’ nature of wood from forests.

This kind of perception was particularly widespread in the United Kingdom, Ireland and among some of the Danes and Belgians when thinking about the situation in their own countries (in contrast to the ‘devastation’ of rainforests).

- **When forestry was seen as an economic activity (by private interests), it was generally viewed unfavourably, in some cases very heatedly.**

This was true in particular in Germany, the Netherlands (where it was nevertheless

recognised that it was less harmful than other economic production activities), Luxembourg, France, Italy, Spain, Portugal and Greece — the Belgians being divided.

- **It was only in Finland and Sweden, and to a lesser extent, Austria, that people thought both of an economic activity and of responsible practices by actors in the sector** — although there were some doubts in the latter two of these countries.

□ **The sector's appeal as an employer was low or very low everywhere.**

The group participants were asked to what extent this was a sector in which they would like or would have liked to work.

- **In some countries, some of the adults questioned mentioned, in an idealistic way, the dream of living and working in the countryside, in an unpolluted atmosphere, far from the stresses and problems of city life (Denmark, the Netherlands, Belgium, Luxembourg, Spain, etc.): this was, however, very abstract.**

**Young people evinced little interest in any of the countries studied, with very rare exceptions** — even in those countries in which forestry is a key sector perceived as essential for the economy.

- **The reasons for these attitudes can be summarised as follows.**
  - The gap between urban culture and lifestyles and the forest universe — in some cases with explicit fears of isolation, lack of comfort and lack of modern conveniences.
  - Very general ignorance of forestry trades and a tendency to see them only as jobs of a manual and physically tiring, or monotonous and repetitive (when mechanised) type that were, in the women's eyes, chiefly for men — and that were badly paid.
  - General lack of an image of modernity and dynamism.
  - Refusal, in extreme cases, to take part in the 'devastation of forests' by working in this sector.

— The feeling, even in those countries in which this is an important sector, that the number of jobs is declining as a result of mechanisation.

— Bureaucratic image of the public authorities responsible for forests in some countries (Luxembourg, Greece).

□ **The participants were asked for their reactions to a short document presenting this sector.**

*Forestry and forest working*

*European forests are very diverse, ranging from the massive expanses of conifers and silver birches of northern Europe, via the Alpine forests and broadleaved forests of the plains of the central regions, to the cork oaks and pines of the Mediterranean.*

*This diversity is due to the variety of European climates, and to the structure of forest ownership. Two thirds of European forests are owned by 12 million small private landowners, for whom they are a source of significant or at least supplementary income — although this is an economic activity of limited profitability in which people do not make their fortunes. This supplementary income is particularly significant in the economically underdeveloped rural areas of European countries.*

*Overall, forests and the industries that use forest products are an extremely important and growing economic sector in Europe, with a turnover of EUR 400 billion, providing work for three million people.*

*People often have a traditional image of forestry. This image is not in keeping with reality as this is a sector that nowadays uses sophisticated technologies and the results of scientific research, including biological research, thereby helping it to play more of a part in the conservation of the environment.*

*In contrast to what some people think, European forests are developing and occupying a growing area, because they are being managed sensibly and strictly. When mature trees are felled, areas that are at least equivalent are replanted; one of the tasks of forest management and maintenance is to ensure the preservation of biodiversity by selective and controlled felling. This also helps to ensure that forests are places for walking and leisure: if they were not managed, as they have been for centuries by owners keen to maintain their land and the diversity of landscapes, they would be little more than impenetrable thickets.*

*Environmental conservation also involves the fight against the greenhouse effect and climatic warming that are now known to be facts and that are key problems for our planet. Forests act as 'carbon filters' by absorbing considerable quantities of the CO<sub>2</sub> that human activities release into the atmosphere which are responsible for these problems.*

*This stress on the responsible management of European forests goes together with a commitment by forestry professionals.*

*This commitment is also shared by the enterprises that work with and market tropical wood that cannot be produced in Europe but whose properties of strength and resistance are indispensable for some applications, in construction or carpentry. The countries of the third world, in which this kind of wood is produced, in some cases tend to turn a blind eye to uncontrolled exploitation which destroys their forests, without the precautions and replantation needed for the regeneration of these forests. European enterprises producing and marketing these kinds of wood are endeavouring to encourage these countries to introduce sound practices for the long-term management of their forest resources; it is in their interests, as well as those of the producer countries, for these resources not be exhausted.*

- **The first paragraph, mentioning the diversity of European forests, was undisputed;** in some countries (in southern Europe in particular), it focused people's attention on the forests in their own countries.
- **Many people found the information in the second paragraph, which noted the large number of (small) forest owners in Europe, new and surprising** — except in the Nordic countries (where people were undoubtedly aware that this was the situation in their own country).

**The truth of this statement was not disputed. It was seen as neutral information** giving rise to no particular reactions, or **in some cases as positive information** (people felt that piecemeal ownership was more likely to ensure that a diversity of species was maintained than major operations of the 'industrial' type, suspected, as mentioned above, of practices of over-exploitation and cultivation of single rapid-growth species).

Some people (although this was fairly uncommon), felt that there was a contradiction or at least a paradox between the statement that this was a sector of limited profitability and the statement of a 'significant' contribution to owners' income — or the statement, in the following paragraph, of the sector's growth and development.

- **The importance of this economic sector in terms of turnover and jobs was generally felt to be surprising** — except in Sweden and Finland.

This information clearly helped to change some people's existing view of the sector (in particular in the United Kingdom, Italy, Spain (among the young people) and Portugal).

In some cases, however, participants placed this importance on a relative footing by stressing that the text provided no comparative information with other economic sectors in Europe, and that the crude figures, lacking perspective, 'said little' (Austrian, Irish, Dutch and Belgian participants) or accepted the information on the overall European situation, while considering their own situation to be different (Spain and Greece in particular).

- **The notion of a technologically sophisticated sector, put forward in the text, was seen as a new and positive development, in particular in those countries where the preceding paragraph had helped to step up awareness of its economic importance.**

It was nevertheless questioned in other countries and considered in some cases to be exaggerated: people could accept the notion of modern operating and management methods, but not to the point of seeing forestry as a high-tech sector.

The argument was better accepted by the Finns and Swedes.

- **Strict management of European forests, and their development, were sources of surprise.**

The information on the quantitative growth of European forests was accepted overall — with serious doubts, however, in Austria, the Netherlands and among some of the Finns, and in Spain and Greece (where people, although willing to accept the idea, considered at the same time that this overall European picture was not reflected in their own countries).

The information on responsible management (systematic replantation, preservation of biodiversity) came as no surprise to most of the Finns, Swedes and Austrians (for

whom this was a familiar concept 'at home'); it was felt to be relatively credible in the United Kingdom and France and (to a lesser extent) in Italy; **there were doubts, ranging in degree, however, in all the other countries.**

- **The following paragraph on the role of forests as regards the greenhouse effect was accepted without reservation;** it was in keeping with what people have seen and heard in the media in recent years; **it stressed, however, the merits of forests per se rather than the merits of the forestry industry** — despite the information on the responsible management endeavours of this industry.
- **The final paragraph, which reported on the commitment and efforts being made by European professionals working with and marketing tropical wood to encourage the developing world to use its resources rationally, was very widely and often very heatedly disputed** as no more than propaganda that lacked any credibility — people had fundamental doubts about this commitment or considered that such pious sentiments were not in practice followed by any action.
- **Overall, this text presenting forestry was often seen as a *pro domo* defence** from this economic sector, that was exaggerated or whose 'unproven' statements about the most sensitive issues discussed above were open to dispute.

## Image of wood processing industries

- **Participants' reactions to the announcement of the discussion theme of wood processing industries immediately showed that this was a very hazy concept among the public.**
- **People generally had intuitions or assumptions, rather than any actual knowledge, of what was involved.**

Some groups tended to include all the sectors using wood as a raw material, including paper (as well as wood for heating, bedding for animals that was believed to be made from sawdust, bark used as a fertiliser, resin in the countries of the south, textile fibres, etc.).

People in the United Kingdom, Ireland and Italy had particularly nebulous initial ideas about these industries.

- **For the most part, people could see that these were industrial activities manufacturing wood products and objects, but their knowledge of production processes, even in outline, was generally vague.**

The **products** cited were chiefly furniture and construction materials, whether crude or worked, and building components (timber, joinery, floors, doors and windows and other carpentry products, etc.) — which were cited in varying degrees of detail and accuracy in different countries.

The products that generally came to mind tended to be finished products ready for purchase by consumers rather than semi-finished components whose importance in construction seemed to be underestimated by these urban participants — apart from those who mentioned fully wooden chalets,

especially in the Nordic countries where such houses are very widespread.

Chipboard was a product that came to mind much less spontaneously (cited in the Finnish, British, French, Italian and Greek groups — but not by all their participants and rarely elsewhere).

Apart from these products, there were a few mentions of tools, wooden toys, sports equipment, shipbuilding components, matches, cork stoppers, etc.

Analysis showed, however, that **the ability to cite a range of products did not go together with a clear perception of industrial processes and structures.**

— **Sawmills were a type of woodworking enterprise that was known and fairly clearly identified** — although not always well differentiated from forestry work (image of rural sawmills located close to forests where felled trunks 'naturally' arrived).

— **However, industries downstream** of the initial processing of wood — with the exception of furniture — formed a sort of undifferentiated whole in many people's minds and there was little thought about their specialisms: at the extreme, people imagined that worked wood products left the sawmill directly — or, in any case, had never given any thought to this question.

**In general, the notions of line, sequence and processing industries were very rarely spontaneously mentioned.**

This was less true, logically, in the few countries in which wood industries are important and familiar and where there is a 'general culture' surrounding these issues, as for instance in Finland, Sweden and Austria.

- **Outside these main aspects of people's perceptions, citizens' views of wood processing industries varied greatly from one country or even one person to another.**

— Small enterprises still working closely with nature and craft enterprises or large enterprises (the latter in particular for the Finnish, Swedish, Dutch and Danish adult groups).

— Manual work or mechanisation (both being able to coexist).

— Sector growing or declining — or seen as stable (in the majority of cases).

- **Questions about the importance and usefulness of these industries brought the following replies.**

- **People very often spontaneously recognised the usefulness of these industries in view of the products that they manufacture**, which are in daily and current use for everyone — reasoning therefore as consumers.

Only a minority (of young people in some countries) commented that this usefulness, which they did not dispute, was less than it had been in the past, other materials having been developed for use for some of the same applications.

There were also comments about the quality and nobility of the material that they processed — wood being prized in this respect for its natural character, its warmth, its 'ecological' dimension, etc.

- **Views on the importance of this sector in economic terms varied.**

It was felt to be the most important in Finland, Sweden and to a lesser extent in Austria, Belgium and Spain — in contrast to Ireland, Italy and Greece (where it tended to be seen as a sector that was not very widespread nationally): in the other countries,

the participants had few opinions — this was a question about which they had patently never thought.

**Overall** (and apart from the two Nordic countries highly dependent on woodworking activities), **the feeling was that this sector's economic importance was not marginal or minor — but nor was it seen as a major and highly visible industry.**

- **Reactions with regard to the modern and innovative, or in contrast, traditional, nature of this sector were as follows.**

- **Its image had a traditional component everywhere**, as a result of the material processed by this sector which has always existed and which provides it with a timeless nature.

- **It was not obsolete or archaic:** people knew or (rather) assumed that these industries have, like others, had to develop, adapt and take up new techniques and new production equipment.

Whether explicitly or implicitly, what the participants had in mind here was the trend away from manual and craftwork towards more mechanised and automated production systems.

- **Its perceived or assumed technological development was, however, gradual and not revolutionary.**

Only a very few participants (in Sweden and Belgium) mentioned 'new materials' or composite assemblies; in general, however, the public was not at all aware of the major technological innovations that might have taken place in some wood processing sectors.

- **Overall, the wood processing sector was seen as relatively environmentally friendly.**

- Like any industry using wood as a raw material, some of the people questioned brought up 'the destruction of forests' by this kind of activity (United Kingdom, Spain, Portugal and Greece in particular). Criticisms were moderate, however, in this case.

The natural nature of the material being processed, however, in some cases fed the

notion of industries beneficial or at least neutral in this respect.

- **The use of chemical treatment products (glues, solvents, etc.) was also questioned in some cases** (in the Austrian, British, Portuguese and Greek groups).

Alongside, however, the Swedes and Finns who stressed, because they had explicitly heard about it, the major progress made in this field, some Belgians and Italians brought up the recovery and recycling of production residues and waste.

- **Overall these industries were not felt to be very polluting and hazardous for the environment — much less so, in any case, than other industries.**

- **These image dimensions, moderately positive or at least not affected by damning flaws, were, however, fairly vague for industries that lack visibility and whose enterprises are not known.**

**In many countries, group participants were unable to name any enterprise in the sector** — apart from furniture production or retail enterprises, wood and construction material retailers and in some cases papermaking enterprises that were assimilated with wood processing in the broad sense.

It was only really in the Nordic countries (and in Luxembourg as a result of proximity with a panelling enterprise or local joinery SMEs) that people were able to name some production companies.

- **As a potential employer, this sector, although not disparaged, did not seem very attractive.**

The same ideas mentioned as regards forestry came up again: physically hard work (for men in the eyes of the women participants), manual or unskilled jobs (work on large 'production line' equipment), undoubtedly badly paid and leaving little scope for personal initiative and creativity.

They often went together with the notion of difficult working conditions and environments (noise, dust, hazards) — among participants who were thinking largely about sawmills.

Only a very few adults mentioned the pleasure that they would gain from working with a noble material such as wood, and some young professionals mentioned design (thinking mainly about furnishings) — leaving aside management and marketing posts which were interesting per se but not particularly interesting in this specific sector.

- As for each of the sectors analysed in this study, participants were asked to give their reactions to a text presenting wood processing industries.

*Wood processing industries*

*European wood processing industries include 42 000 enterprises employing close on two million people – i.e. 6 % of total jobs in industry — and account, overall, for EUR 150 billion in the European economy.*

*These industries include sawmills, the manufacture of board (from chips, fibres, plywood and other), wood pallets and packagings, wood flooring, doors, windows and other internal fittings, as well as a wide range of wooden articles, and activities to impregnate wood to provide it with protection and durable strength.*

*Wood has a whole range of applications in particular in construction, internal furnishings and carpentry. It is a material that can be used very flexibly, and which plays its part in the comfort and pleasure of life as a result of its technical properties and its warmth and natural character.*

*These wood processing industries are industries that are technically sophisticated and highly competitive as a result of the investment that they have made in high-performance production machinery and processes. The jobs that they offer nowadays attract employees able to combine a feeling of nature with technology and creativity.*

*These industries have a positive impact on the environment. As well as using a renewable and biodegradable material, work with wood requires much less energy than work with other materials; production waste can also be largely recovered and used on site to produce the energy needed to run plant.*

- **The first paragraph on the size of the sector in Europe, was generally felt to provide information of which people were unaware; most people felt that the industry was much larger than they had thought.**

A few people commented that figures without comparative data say little, or related the sector's turnover to the turnover mentioned previously in the text on forestry, wondering to what extent double employment was involved or asking about the sector's added value.

- **The second paragraph contained factual information that could not be disputed on the diversity of wood applications — which were rarely very novel, but which helped to improve existing knowledge.**

- **The same was largely true of the third paragraph** concerning the applications cited and the notion of the attractiveness of wood which is part and parcel of the established image of this material.

Some criticisms were made about products (chipboard) not in keeping with this notion of the product's 'nobility'.

- **The fourth paragraph, on the modern nature of the sector and the appeal of the jobs on offer, was fairly credible as regards the first statement** — as long as 'too much stress' was not placed on a sector which cannot claim to be high-tech even though it has been modernised (there were some criticisms in this respect), **but the second statement on the development of employment was much less credible** and ran counter to existing notions of a lack of appeal.

'Combining a feeling of nature with technology and creativity' seemed to most people to be overstating the case and providing an overly 'rose-tinted' picture of a situation that was much more mundane in practice.

- **There was strong opposition to the argument about the sector's beneficial effects on the environment** (only a proportion of the Belgians, Italians, Portuguese and Greeks refrained from any criticism).

**This does not mean to say that the sector was seen as particularly harmful to the environment**, nor that each of the points made in support of this statement was not accepted: the biodegradability of wood is a recognised fact (despite some reservations for instance in Austria, Ireland, Luxembourg and France as regards the glues used for the production of chipboard or other products, or the wood impregnation products mentioned in the second paragraph); the statement on the reuse of production waste and energy saving was generally convincing.

**It was a firmly held view, however, that no industry can claim to have a positive**

**impact on the environment:** and this statement, considered nearly everywhere to be exaggerated, to some extent countered the positive impact of the more precise and factual information preceding it; this information would be more credible if the statement were to be worded more moderately, and talked about limiting adverse effects rather than making a positive contribution.



## Image of the furniture industry



□ **An analysis of participants' comments, when asked for their opinions of the furniture industry, provided the following main observations.**

- **This was a much more familiar sector**, as a result of the nature of its products — intended for final consumption — that everyone knew and used. The fact that there were well-known retail brands and specialist trade marks also played a part in this.
- **This was a sector whose classification among forest-related industries came as no surprise.**

Some participants spontaneously noted that furniture also used materials other than wood (the Netherlands, Belgium), but this was a fairly uncommon reaction.

- **This was a sector of some standing**, in respect of which people readily spoke of tradition in the positive sense of the term, of national or regional style and of design and whose products occupied an important place in lifestyles and had a 'cultural' dimension.

Nordic group participants readily brought up Finnish, Swedish, Danish and 'Scandinavian' design using light wood, the Spanish and Portuguese brought up the traditional production of furniture in particular regions of their country, and other people spoke of the styles of antique furniture or even (in Italy) of a characteristic and recognised style of kitchen furniture.

- **It was, however, a sector in which people tended to perceive a growing dichotomy between the following.**

— On the one hand, **enterprises, generally of a craft type** or of medium size, **producing** a limited quantity of highly prized but (increasingly) expensive **high-quality furniture** that was not within everyone's reach.

— On the other hand, **the furniture mass production industry** that has developed in recent years providing inexpensive, practical and modern furniture, with a design element, but of low or not very durable quality.

Attitudes to this second part of the furniture industry were ambivalent: people were less appreciative and, in some cases, very critical of a development breaking away from the virtues of quality, care and durability, using more ordinary materials (the chipboard from which this furniture is made being contrasted with the noble wood used by the craft industry), but were aware at the same time that they purchased and used such furniture themselves.

Some enterprises of this type were in some cases criticised for their production relocation practices, Ikea being a typical example (some participants, for instance in Finland or Spain, felt that Ikea was exploiting child labour in the developing world).

□ **Reactions to questions about the perceived usefulness and importance of this sector were as follows.**

- In all the countries, **the importance of furniture** was stressed as a key factor in life's comfort and pleasure, as a significant element of people's lifestyles, tastes and

personalities — and was also felt to be indispensable from a utilitarian point of view.

- **The importance of this industry in economic terms.**

— **This was generally felt to be great:** people tended to reason intuitively from the fact that these products are universally and necessarily used and from the purchases of furniture that they had themselves made.

Some people also noted changes in consumer behaviour as regards furniture, i.e. that it was becoming a disposable product that could be replaced (and not a lifelong product as in the past) and felt that this change would help to expand the market.

— **The perceived importance of the national furniture industry varied.**

Although in all or almost all cases, people noted a national tradition of high-quality craftsmanship which was persevering in the face of varying problems, they were well aware that this did not account for a major proportion of production by volume.

Overall, the Swedes and Danes tended to attribute the largest economic importance to their furniture industry (but not the Finns who felt that it was rapidly being relocated), followed by the Belgians, Italians and Spanish — in contrast to the Irish and Greeks who felt that imported products had a predominant and growing market share.

- Although tradition was a component of its identity and value, **the furniture industry clearly had a modern, innovative and dynamic image.**

- **The dimension of innovation had strong links with design and creativity.**

The renewal or diversification of styles was noted in practically the same terms in all the countries, and as much in groups of young people as in groups of adults.

This shows that, despite the many mentions of tradition in their initial statements, and despite some nostalgia for the gradual shift of

‘period’ furniture away from the core of industrial output, people also valued the furniture industry for its more contemporary styles.

- **The ‘mass production’ segment of the sector, containing large and dynamic enterprises, was readily seen as equipped with ultra-modern and very efficient machinery and equipment, in the vanguard of innovation.**

Some participants, better informed than the average (or believing themselves to be so), also pointed to the notion of materials innovation (wood or wood-based or composite materials) or manufacturing process innovation; this idea was mooted in some groups in the United Kingdom, Luxembourg, Spain, Portugal and Greece (in the latter three countries, it was felt that the transition from a sector that was still largely craft-based only a few years ago to an industrial structure was a particularly spectacular leap forward).

- **The image of dynamism also came from the visibility of marketing and advertising campaigns run by the major firms or the main furniture brands** — even though these were mainly retailers rather than producers — and the cut-throat competition between them gave the impression of a sector which was ‘doing well’ and moving forward.

- **The impact of the furniture industry on the environment was everywhere felt to be neutral or slightly negative.**

As mentioned above, no industry of any kind can credibly claim that it has a positive impact.

As regards the furniture industry:

- It benefited, like the other wood-based industries, from the valued ‘ecological’ image of this material.

- **While it did not completely escape accusations of playing a part in the destruction of forests, the criticisms were limited.** There were traces in the United Kingdom, Ireland, Luxembourg and Greece — and more heated criticisms in the Scandinavian countries as regards furniture made from tropical wood.

- Whether or not participants used the term, they were well aware that **the activity**

involved was mainly one of assembly, without the negative connotations generally associated with heavy industry.

- **There were reservations, however, about chemical products** (glues, varnishes, paints, etc.) **perceived as polluting and making recycling difficult** — an issue mentioned in particular in Germany, the United Kingdom, Belgium, Luxembourg, Italy and Spain.

- **Questions about the enterprises in the sector confirmed that, in contrast to most of the wood industry's sectors, this sector was highly visible among the public.**

In many of the countries studied, **people spontaneously named fairly large numbers of furniture brands** (manufacturers or retailers) **or well-known designers.**

The following were mentioned: Aalto and Artek in Finland as well as Ikea in Sweden and Denmark; Arne Jacobsen and Wegner in Denmark; Ikea together with Interlübke and Hülsta in Germany; Lutz, Leiner, Kika, Möbelix, Möma and Ikea in Austria; Ikea, MFI and John Lewis in the United Kingdom; Reid's, Bargaintown, Protea Pine and Williams in Ireland; Ikea and Oisterwijk in the Netherlands; Ikea in Belgium and Luxembourg together with Habitat; Blokker and Casa, Ikea, Fly and Conforama in France; major kitchen brands in Italy; Ikea and the high-quality craft sector of several regions in Spain and Portugal; Varagis, Deloudis and Silvestrides in Greece alongside Neoset, 1+1, 120, and Ikea and Habitat.

**The image of the sector's enterprises continues to be dominated by retailers.**

- **The appeal of the furniture industry as an employer was clearly higher, albeit not very high, than in most of the other sectors of the industry.**

**The main reason for this**, as mentioned by the young people in several countries, **was the aura of the design function** which was perceived as attractive, appealing and creative and calling on high-level skills.

There was more explicit interest than in other sectors in marketing and commercial functions — undoubtedly because people were more familiar with the industry's products which are intended for the final consumer.

Leaving aside this aspect, interest in the production functions of the furniture industry was as low as in the other sectors, and for the same kinds of reasons (apart from some adults who 'dreamt' of working as cabinetmakers or in the antique trade because of their love of wood or antique furniture).

- **The text presenting the furniture industry put to the group participants was worded as follows.**

*The furniture industry*

*Furniture is a basic product that is indispensable in daily life. As well as being a necessity, it is also a product to which people attach cultural and sentimental values; the wide range of styles and designs reflects and complements everyone's attitudes and lifestyles.*

*The European industry is a world leader, and its products are recognised as the best. French and English reproduction furniture, sophisticated Italian designs, efficient and ergonomically designed German kitchens and the natural style of Scandinavian products are all appreciated and chosen by consumers throughout the world to match their own lifestyles. It is this ability to produce a whole range of designs that is one of the main strengths of the European furniture industry.*

*Furniture manufacturers, and in particular European manufacturers, have always been innovators both in their methods of production and in the invention of new uses for new materials. Thonet was the first to bend wood to produce chairs, Le Corbusier created tubular and glass tables, Bellini created his prestigious chair by covering a framework of metal wire with leather and Starck invented a chair made entirely from a single piece of Plexiglas; they all offered consumers a product more in keeping with their expectations and varied tastes, using a whole range of materials.*

*The production of furniture is chiefly a series of assembly operations which is very largely neutral as regards the environment. It is not the furniture itself, but the materials making it up that may have an impact on the environment. Consumers themselves decide whether they want to have garden furniture in teak, plastic or metal; they can opt for a table top in tropical hard wood, glass or marble or choose kitchen doors in oak, composite or painted chipboard or stainless steel.*

*The furniture industry develops and manufactures all these products using the most modern technologies.*

**Reactions to this text varied greatly in different countries.**

- **Very unfavourable in Finland, Sweden and Denmark** (at least among the young people in Denmark).

All its arguments were disputed as pretentious, propagandising or, in the case of the first three paragraphs, an expression of self-satisfaction.

The fourth paragraph was completely rejected: it was seen as manipulative and in bad faith, the industry trying to pass the buck for its own part in the 'devastation' of rainforests to the consumer — leaving aside less fundamental criticisms of the notion of environmental neutrality.

It was only the final part of the text on the level of technological development of the industry that did not elicit major reactions.

- **Fairly negative in Germany, Austria, Ireland and (to a lesser extent) Luxembourg.**

The Nordic criticisms of the initial 'propagandising' paragraphs were repeated, albeit more moderately, since they provided little information, cited names that 'go in one ear and out of the other' and provided the overall text with an elitist ring that did little to encourage people to think about it and take it on board.

The fourth paragraph was often rejected more strongly (less so among the Austrian and Luxembourg adults) for the same reasons as in the Nordic countries: it was unacceptable for the industry to pass the buck to consumers (together with the same criticisms of the completely non-polluting nature of the industry's products).

- **Fairly neutral in the Netherlands**, (where people were largely indifferent to it, considering that it offered little that was new) and in Belgium (where some positive and interesting points were stressed: the part played by design, the notion of Europe as the leader).
- **Ambivalent in France and Italy:** the references to design and the creative wealth of Europe were generally welcomed (with stronger reservations among the young Italians about the 'advertising' tone of the text); here as well, however, the paragraph passing the buck on to consumers for the problems of the rainforest was unacceptable.

- **Fairly positive in Spain, Portugal and Greece.**

References to the 'cultural' and sociological dimension of furniture were favourably echoed (although the Greeks criticised the masking of aesthetic values by other cultures — American, Chinese, Indian) as well as the statement of European leadership (the Spanish and Portuguese would, however, have liked to see their own country included alongside the other European countries mentioned as sophisticated).

'Environmental' criticisms were not absent, but were less strong than elsewhere.

Some participants were also very surprised by the mention of materials other than wood (in Sweden, Italy, Portugal) — materials seen, moreover, as more polluting.



## Image of the paper pulp and paper and board production industry

- Perceived largely through the finished products manufactured further downstream of the sector by processing enterprises, very little was known about this sector, even though it was spontaneously and insistently given the image of an industry detrimental to and harming the environment.
- In their initial comments, participants from almost all the groups had cited various types of products and applications using paper or (less directly) board or cellulose fibre. We shall not look at these in detail, as they have already been discussed in the first chapter on spontaneous perceptions of the industry's sectors and their output; some participants took the opportunity, however, to add further applications or information to their original lists.
- Their knowledge and comprehension of the industry seemed, however, extremely tenuous; the same was true of production processes and the various stages of the line leading to finished consumer products.

The remark made about the wood processing industries can be repeated here — i.e. **the haziness in the public mind about processing industries in general, which are difficult to differentiate from their earlier stages.**

Consciously or not, many people seemed to think that in practice paper or board products were directly processed by paper-making factories — or admitted during the discussion that it was a question that they had not asked themselves.

Overall, people naturally knew that paper came from wood (and/or recycled paper);

people knew or assumed to different degrees that these raw materials were reduced before being treated, **but did not know by what methods or processes or for what purpose.** The notion of paper pulp was very unclear to many people — some even pointed out that the term was unknown to them before it had been mentioned here — and the term 'fibre' was rarely mentioned.

The degree of ignorance was particularly high in Denmark, the United Kingdom, Ireland, Italy, Portugal and Greece — and often higher among young people than among adults.

It was not as high, however, in Sweden, Austria and in particular Finland where there is a widespread 'paper culture'.

- This ignorance did not prevent, however, an image that was deeply rooted, in a fairly comparable way in the various European countries, of an industry that is particularly polluting and detrimental to the environment.

This image, to which we shall return below, was often mentioned spontaneously in the participants' initial comments — at the same time as they brought up the issue of recycling.

- Questioned about the usefulness and importance of the paper pulp and paper and board production industry, most people recognised that it was important, or even essential or indispensable.
- The extent of consumption of paper in all its forms, by individuals and enterprises,

**tended to shape this notion**, as well as the diversity of uses of paper and board, which were felt to be indispensable materials, without which people could not live and whose applications were often valued.

— Paper was initially seen in terms of its function as a medium for writing and printing, and therefore for the dissemination of information, knowledge and culture.

— Cellulose fibre-based products, which were fairly rarely mentioned in the initial stage of discussions, were mentioned more widely at this stage as products providing both hygiene and convenience in everyday life.

In most of the groups, participants at some point mentioned (in positive terms) the usefulness of toilet paper, tissues, kitchen rolls and 'paper' tablecloths and napkins as mentioned earlier by the participants in some countries. These were supplemented by nappies for babies, feminine hygiene products (which were, however, rarely initially thought of as 'paper' products) and coffee filters.

However, any mention of the medical or industrial applications of these products was very uncommon.

The participants hardly ever, moreover, asked themselves how these products differed from actual paper: they tended to consider these products to be one of the many forms of paper.

Some groups also discussed whether the use of paper would continue to grow in the future with the development of the information technologies (for instance in Denmark, Austria, the Netherlands, Belgium, France, and in particular in youth groups), but the overall conclusion was that paper was not threatened by this development.

• **The economic importance of this industry was considered as follows.**

— **To be fundamental in Finland:** it was one, not to say the, pillar of the national economy, even coming in front of Nokia (more stable, more durable, less subject to the ups and downs by which new technology markets may be affected).

— **As high or fairly high in other countries**, such as Sweden, Belgium, Italy and Spain, where it was assumed that its turnover was high and that it provided fairly large numbers of jobs.

— **As high** — but with no way of assessing this other than by intuition in most of the other countries (people tended to think of large enterprises and large production units, etc.) — except perhaps among the adults in Ireland and Greece who mentioned factories that they vaguely remembered in their area and that seemed to have disappeared, or enterprises that they had heard about (but not in detail) and of whose problems they were aware — this was the case in the United Kingdom as well.

□ **The modern nature of the sector was perceived as follows.**

- Very clearly in Finland (where it was felt to be a high-tech industry), Austria, France, Italy, Spain and Portugal.

Mention was made of large enterprises and large production units that were mechanised, automated, equipped with up-to-the-minute and high-performance machinery, in some cases run by computer systems.

Mention was also made, although less often, of the (growing) diversity of types of product and paper that were felt to be the result of both innovative equipment and flexible production organisation.

It was also felt that account was being taken of the new development of recycling.

- Less strongly in the other countries, where the general idea of an industry that was initially traditional but had modernised was common (although perhaps less so in the eyes of the Danish and German participants).

As in the case of the countries mentioned in the previous paragraph, people had the impression that production equipment had been modernised and also mentioned recycling — from a point of view that had **more to do with process innovation than with product innovation**.

□ **The impact of this industry on the environment was a key aspect of its image and was often viewed negatively.**

- As for other sectors of the industry, some groups had the idea of an industry that, by using wood as a raw material, played its part in the **presumed detrimental exploitation of forests** and their decline: Denmark, the United Kingdom, the Netherlands, Italy, and also Ireland.
- The main causes were felt to be **production processes**, even though little was known about them.

People seemed to be aware of the problems raised by bleaching agents in the countries of northern Europe (Finland, Sweden, Denmark, Germany, the Netherlands, Luxembourg).

More vaguely, people knew or assumed that the production process used chemical substances: in order to 'break down' the wood chip, to remove ink from old paper, or for supposed treatment stages about which people were unable to give any details (Germany, Austria, the Netherlands, Belgium, France, Italy, Spain, Portugal).

This was felt to cause water and air pollution — the smell from paper factories being a symptom well known to the Finns and Swedes who had had personal experience of it.

The issue of water consumption was also raised in Germany and the Netherlands.

- **The paper-making industry was seen as polluting and detrimental to the environment to a high or relatively high degree.**

This notion seemed particularly acute in Denmark, Germany, Austria and the Netherlands, in contrast to Ireland, Portugal and in particular Greece (image in Greece of a natural and biodegradable material, with growing recycling).

- **People were aware and approved, to varying degrees, of efforts to improve this situation.**

— **Recycling of old paper:** this was a theme present in the minds of participants in most countries.

— **Reuse of production waste**, well known to the Finns but mentioned less elsewhere.

— **Research into less harmful treatment products**, mentioned in Finland, Sweden, Germany with doubts, Austria and the Netherlands.

**These efforts were mentioned mostly in Finland, Sweden, Austria, Belgium and Luxembourg;** people felt, however, that **these acknowledged improvements were partial and gradual.**

□ **Mediocre knowledge of the paper pulp and paper and board production industry was borne out by knowledge of the sector's enterprises.**

In many countries, none of the participants was able to name a single enterprise, or the names cited were often, incorrectly, the names of brands of finished products, or even of enterprises even more remote from this activity. There were few correct answers.

In Finland, the names of Stora Enso and UPM were cited; Lambi, a hygiene product brand, and Xerox in Sweden; Smurfit in Ireland; Van Gelder in the Netherlands; La Cellulose des Ardennes in Belgium; a board factory in Lintgen in Luxembourg; Sarrio and Papelaco in Spain; Portucel in Portugal — the German, French, Italian and Greek participants giving no names at all.

□ **The appeal of this industry as an employer was low everywhere.**

With the exception of a few comments (by young people) that management posts could be of interest in any branch of industry, no-one was envisaging or would envisage working in an industry seen in practice as off-putting — and especially off-putting for young people: image of heavy industry, monotonous tasks, low-skilled jobs in a polluting or foul-smelling industry, about which people, moreover, knew practically nothing.

□ **The participants were presented with the following text on the industry.**

*The paper pulp and paper and board-production industry*

*Pulp — the raw material needed for the subsequent stages of paper and board production — is produced from wood chips which are the residue of forestry output and cannot be used for other applications, and from recycled paper and textiles.*

*Throughout the various stages of production, the paper industry is a very high-performance industry, which uses extremely sophisticated technologies and production equipment, offers increasing numbers of skilled and interesting jobs, is playing its part in Europe's economic growth and is developing at the rapid pace set by the many applications of paper.*

*Paper and paper products are very wide-ranging products that are indispensable for every consumer's daily life — writing paper, printing paper and packaging as well as very many highly technical applications in insulation, filtration, labelling, etc..*

*In contrast to what is sometimes imagined, the computer era has in no way reduced the need for paper. The more computers develop, the more the information that they produce is printed and forwarded on paper which has continued, since Gutenberg, to be the essential medium for the dissemination of information, culture and knowledge. Far from being killed off by the advent of electronics, paper is its absolutely essential complement.*

*Paper in the form of toilet paper, tissues, nappies, cleaning products, disposable medical and hospital products or even non-woven cloths and napkins, is also a material that is both convenient to use and guarantees hygiene.*

*In comparison with other materials, for instance plastics, paper also has the advantage that it helps, in almost all respects, to conserve the environment.*

- *It is one of the few renewable raw materials: it was explained previously that forest working always goes together with forest regeneration.*
- *If these residues were not used for the production of pulp, a substantial proportion of the wood that is worked would be unused and lost.*
- *It is one of the industries in which recycling is most advanced: close on half of output now*

*comes from recycled fibre and this proportion is growing every year.*

- *Even when it is not recycled, paper rapidly biodegrades and does not pollute the environment.*
- *There have been spectacular improvements in production and recycling processes in order both to reduce pollutant emissions from production processes and water and energy consumption. The industry has itself introduced monitoring and certification initiatives moving in this direction.*

**Reactions varied greatly from one country to another.**

- **They were very clearly negative in Finland, Germany, and among Swedish adults.**

This was seen as a propaganda document glorifying the paper industry which insidiously 'fudged' problematic issues. Although the information contained in the text was not really questioned, it was criticised for hiding the real picture: by suggesting, for instance, without any back-up, that the industry uses only forestry residues and recycled materials — a comment made in Finland; by minimising polluting effects, without giving any figures to support the claims about reductions of environmental damage and by suggesting that the industry has taken monitoring and certification initiatives off its own bat, without any pressure from the public authorities, etc.

Criticisms therefore focused on the environmental issue: there were also doubts in Germany about the growth of employment (in an increasingly automated sector) and about the interest of the jobs on offer.

Young people in the Nordic countries also discussed whether the use of paper would continue to grow in the era of new technologies.

- **Reactions were also negative overall in Luxembourg, among Belgian adults, and among young people in Denmark, Austria, Ireland, France and Portugal** – for the same types of reason.

— First, minimisation of adverse effects on the environment, or overestimation of the efforts being made in this field.

- Doubts about the relative growth of employment in Austria and Portugal in particular.
- Discussions among young Austrians, Irish and Portuguese about the repercussions of the development of the information technologies.
- **They were neutral or ambivalent among Irish, Spanish and Portuguese adults, and among both the Dutch and Italian groups.**
  - Positive comments included the informative nature of the document on the industry, its economic importance, the wide range of production, and the non-use of whole trees for production (a mistaken interpretation of the text by the Irish and Dutch).
  - Negative comments largely included doubts as to whether the environmental improvements had actually taken place.

The question of the impact of the new technologies came up here as well.

- **The text seemed credible overall to Danish, Austrian and French adults, Belgian and Spanish young people and the British and Greeks.**

Participants who reacted favourably in these groups were to some extent people whose ignorance of the sector was almost total and who were provided with basic knowledge about the sector by the text (production processes, recycling, economic importance). The arguments on practices respecting the environment were also noted without any fundamental criticisms.



# Image of paper and board processing industries



- ❑ **The announcement of this discussion theme on the paper and board processing industries often disconcerted participants who had little spontaneous knowledge of it.**
  - The term was particularly nebulous for the British, Irish, Italian, Spanish, Portuguese and Greek participants — but it was not really clearly understood anywhere, as people were confused by the distinction between the successive stages of the production system. Even in Finland and Sweden, participants stated that they were interlinked — but this was more because they were thinking of the major, vertically integrated, paper groups.
  - As regards **the products of this industry, there were two different trends.**
    - **The first was to think of a whole range of paper and board products of all kinds** (including, among many others, packaging).
 

This was common in Germany, the United Kingdom, Ireland, Belgium, Luxembourg, France, Spain and Portugal.
    - **The second was to focus on packaging** (under the influence, it would seem, of the word ‘board’).
 

This was the main reaction in the other countries, and some of the participants in the first group also moved in the direction of these products at a later stage.
- ❑ **The importance and usefulness of the industry were assessed through its products: they were felt to be high or very high in most countries.**
  - **The useful functions performed by packagings were stressed**, for the protection and preservation of the products that they contain, although the growing practice in today’s society of packaging products that were not packaged in the past was mentioned; the convenience of such packagings and in some cases the virtues of cardboard for such functions were also mentioned.
  - **At the same time**, in a number of countries, **excessive packaging was criticised** (in cases where such packaging was not always necessary) with the linked idea of wastage.
 

This was particularly the case in Finland, Sweden, Denmark, the Netherlands (among adults), Belgium and Italy.
  - **Recycling** was also mentioned in many groups as a relatively recent and welcome development and a way of trying to find an answer to this problem.

**The participants, however, had little to say about the importance of the sector or its enterprises in terms of the national economy: they were more or less ignorant of this issue.**
- ❑ **Many people felt that the industry was innovative, and saw this:**
  - **Through the new types of packaging** which people saw appearing as consumers and the research and design function that this supposed (argument put forward in the United

Kingdom, the Netherlands, Spain, Portugal and Greece and by Danish and Irish adults).

- **Through new materials** or composite materials (of which the Finns, Irish and Belgian adults were very aware).
- **Through the image of modern enterprises and production units** equipped with high-performance and technologically advanced machinery.

This issue was raised in Finland and the United Kingdom in particular. It was also raised by the Austrians, Italians and young Belgians who had the idea of a traditionally-based industry that had developed and modernised.

- Vaguely only in Sweden, Germany and France.

It was only really the young Danes and Irish who saw this industry as traditional and lacking dynamism (shaped largely by the notion that 'board is board' and that few developments were to be expected).

□ **The issue of the environmental impact of the paper and board processing industry led to only moderate criticisms of this industry.**

- These were raised in the United Kingdom and Greece as regards its contribution, as a sector of the wood industry, to the problem of deforestation (albeit only an indirect contribution); in the Netherlands, Austria and Greece as regards the problems raised by composite packaging materials, in Sweden and the United Kingdom where recycling was not felt to be widespread enough and in the adult group in Luxembourg.

The industry was not, however, considered to be a serious polluter.

- Attitudes in this respect were neutral overall in Ireland, Germany, Belgium, France, Spain and among Portuguese adults (there might be some polluting effects, but people were not sure, or recognised the advantages of recycling).
- Attitudes were moderately favourable in Finland (the efforts being made were stressed, although this industry, like all other industries, continued to be a polluter).

- They were even clearly positive among the Danes and the young Luxembourg and Portuguese groups where the recycling argument was very important (as well as the biodegradability of 'green' packaging in Luxembourg).

□ **Little was known about enterprises in the sector.**

- None of the Danish, British, German, Dutch, Luxembourg, French, Italian, Portuguese and Greek participants could name a single enterprise — as some participants noted, these were 'faceless' enterprises and, as consumers, they were more interested in the content than the container.

Participants mentioned, with varying degrees of actual knowledge, Sanglier in Belgium, Smurfit in Ireland, or Unipapel in Spain.

It was only in Finland, Sweden and Austria that people gave names with more assurance: respectively M Real, Turun kirjekuoritehdas, and 'SMEs'; Tetrapak; Tetrapak and Leycam.

- People knew very little about the actual situation of these enterprises, leaving aside the fairly innovative aspects of their image mentioned above, apart from a very few conjectures about their size (large according to some Germans, SMEs, however, according to some Belgians ...).

□ **The appeal of this industry as an employer was not as bad as in the other sectors of the wood industry, but was still low.**

The general reservations about work in an industrial environment (seen as manual, repetitive, unskilled) were put forward again, in particular in the United Kingdom, Ireland, Austria, France and Italy; a lack of interest in a product seen as commonplace in Denmark and Italy; the rural location of these enterprises in Finland.

Only a few Danes, British, Dutch, Belgians and Portuguese expressed any interest in production conception and design functions, but without any great enthusiasm.

As in other sectors, this sector suffered from citizens' considerable ignorance of it.

- **The following text on the paper and board processing industry was presented to participants.**

*The paper and board processing industries*

*The paper and board processing industries play a key role in the economy of European countries and in the everyday life of their citizens.*

*The uses of writing and printing paper, the many hygiene uses of paper fibre and industrial applications have already been mentioned. The range of uses of paper and board is in practice extremely wide, and includes the separate field of packaging which involves highly technical products that have to meet very specific constraints.*

*Packaging in practice has a multiple function: to protect products from air, water and substances that could degrade them, to conserve them in the best possible way (for instance, fresh foodstuff products), to withstand impacts and the constraints of transport and storage, to withstand the temperature and degree of humidity of refrigerators or cold rooms for some products, to include easy opening systems for the convenience of users and also to provide a clear and attractive impression of the features of the product.*

*From enormous rolls of paper weighing several tonnes produced by the basic paper industry, the processing industries take account of all these constraints to develop products adapted to different needs, using paper, board, or complex composite materials that combine paper or board with sheets of metal or plastic, for instance milk 'cartons', flexible packagings, high-strength cardboard boxes, etc.*

*These are industries that are also highly specialised, that are constantly on the lookout for new products and new production processes, and that are growing rapidly.*

*Like the other sectors of the industry, this sector helps to preserve the environment by using a renewable, recyclable and biodegradable material.*

**Participants reacted as follows.**

- The first five paragraphs of the text, offering factual information on the activities of the paper and board processing industries, their products and their applications, were largely felt to **provide information that could not be disputed, and that was felt in some cases to be new.**
  - The Finnish, Swedish, German, Dutch, Belgian and Luxembourg participants felt that it contained little that they did not already know.
  - In other countries, the text provided further information or bore out notions that people already had which were, however, rather hazy: for instance on the nature of its specific activity (in comparison with the industry upstream), its importance and growth, its innovative nature as demonstrated, for instance, by the wide range of products and applications: this was the case in Denmark, the United Kingdom, Ireland, Austria, France and Italy.
  - It was felt to provide more information of which people were unaware in Spain (among the young people, on the technical features of cardboard), in Portugal (on product innovation) and in Greece (on the applications and importance of the sector).
- **There were criticisms or reservations about some aspects of the text.**
  - **The sector's importance:** this was accepted, but the term 'key role' in the economy of European countries was felt in some cases to be exaggerated (comments in the United Kingdom and Italy in particular) or unsupported by precise figures (Luxembourg).
  - **Its modernity and highly innovative nature** (Ireland and Italy), and the high-performance features of board material (Austria).
  - **The tone of 'self-satisfaction' or 'self-congratulation'** — seen as such in particular in Sweden, Denmark, Germany, Austria, Belgium and Luxembourg, especially in the youth groups.

Criticisms of these aspects were **far more moderate than those raised by the texts presenting other sectors of the industry**, analysed in previous chapters.

- **The argument about respect for the environment was the most questionable aspect.**

**While this industry was not felt to be a source of serious damage to the environment:**

- it was (again) stressed that **no industry can claim to 'play a part in preserving the environment'** (the most that it can claim is that it does little harm): this applied in Finland, Sweden, Ireland (among the young people), the Netherlands and Greece;
- there were also criticisms of a text that spoke only in positive terms, possibly concealing adverse effects (United Kingdom, the Belgian youth group);
- **more specific criticisms were levelled against multi-material composite packagings**, which had to have an impact and raised recycling problems (Sweden, Germany) — or the use by the packaging industry of materials (plastic) other than paper and board (Ireland);
- **in some cases there were more confused doubts** (Spain, Portugal, etc.).

# Image of the printing industry

□ Participants' spontaneous reactions when discussing the printing sector, showed this to be a familiar, and generally valued, sector.

- The feeling of familiarity came from **printing products**, that were known as a result of their daily use and visibility.

In almost all the groups, newspapers (and magazines) and books were immediately mentioned.

Advertising and its various written mediums: posters, brochures, leaflets, catalogues and other forms of advertising that people received in their letterboxes were also frequently mentioned.

Less spontaneously, postcards, business cards, greetings cards, packagings, labels, various kinds of tickets, wallpaper (much less often) and so on, also came to mind.

**It was also due to the fact that people had already seen printing works**, either directly (use of the services of a printer for business cards or announcements, visits to printing works by several people in various countries) or in films or television programmes (images in particular of huge rotary presses for newspapers).

It may also be due to the fact that people were sure, in contrast to some of the other sectors of the wood-based industry, of its actual existence and development in their own country (reaction recorded for instance in Greece).

- The valued nature of printing work was linked to the predominance in participants'

perceptions of books and newspapers among this sector's products: mediums for the dissemination of information, knowledge and culture.

It was also clear here that the public to some extent confused printing and publishing and that the positive image of the former rebounded on the latter.

Some references were also made to the historic dimension of the printing trade.

- **The dynamic and innovative nature of the sector was also mentioned in some cases:** for instance in the Finnish, Danish, Austrian, Irish and French groups (in some cases, but not predominantly, with some nostalgia for a human craft that has become increasingly automated).

- **In some countries, information put forward spontaneously about printing also included the notion of a polluting and environmentally damaging sector:** this was the case in Germany, Austria, Belgium, Luxembourg and (much less clearly) Portugal.

□ **This sector was universally felt to be useful and important.**

- **As a result of the nature of its products.**

As mentioned above, books and the press predominated in people's views of printing products. Participants everywhere dwelt at some length on **the essential functions of communication, dissemination of information, dissemination of knowledge, education and culture, for which the written**

**word was and remained the main and essential medium.**

There was also **an essential social function**: modern society would clearly come to an immediate 'standstill' if it were not fed by communications and information.

Some references were made at this stage to the growing importance of the electronic information and communication technologies and the audiovisual industry (in Finland, Denmark and Portugal) — but this tended to bear out the belief that writing would not become a thing of the past and that reading offered a convenience, comfort and pleasure that the computer screen did not and would not offer in the foreseeable future.

There was a few contrasting comments about over-information and the over-abundance of advertising (in the Swedish and Austrian groups), but these did not call into question the obviously very positive feeling about the usefulness of this sector.

- **Secondarily, as a result of the relatively intuitive perception of the existence of large or very large enterprises** in the printing sector which helped to bear out the idea that it was an economically important sector.
- **It had an almost unanimous image of dynamism and modernity.**
  - This image was most strongly stated in Sweden, Denmark, the Netherlands, Belgium, Luxembourg, Spain and in the Greek youth group, where printing was seen as an extremely modern and innovative sector in which very rapid technological advances were taking place.

It was also perceived in this way in the other groups, in which the participants at the same time noted printing's historic roots in tradition or the continuing coexistence of large and ultra-modern enterprises and small printing works — i.e. 'local print shops' or printing works specialising in output of a highly artistic or cultural nature.

It was only really among some Irish and Greek adults and Portuguese young people that an image of tradition and low-level development was still to be found.

- The main element in this assessment of printing's modern nature was **digitisation and the development in this sector of new information and communication technology applications.**

This was mentioned very generally, for instance in Denmark, Belgium, Italy, Spain and Greece, with explicit reference to some of these applications in Finland (remote printing of texts or images sent 'by satellite', graphic design function), Ireland and Luxembourg (graphic design).

**The increasingly modern nature of machines and printing processes** was also a common notion in Germany, Austria, Luxembourg, Italy, Spain and among some Portuguese and Greeks.

The development of water-based colouring agents and inks, less harmful for the environment, was a perceived factor of modernity in Finland and Sweden — with reservations that will be examined below.

- **The impact of the printing industry on the environment was generally felt to be negative.**
  - **This perception was widespread in almost all countries** — with particular force in Denmark, Germany and Belgium.

It was less clear-cut, however, in the United Kingdom, France (where negative effects were suspected rather than genuinely known about), and in Ireland (where some participants had never heard about this problem); it was more relative in Italy and among Spanish and Portuguese young people and was almost non-existent in Greece.

- **The main issue was the use of inks and 'colouring agents': chemical products often seen as particularly harmful or even toxic** — which, in addition to their effects on the environment, could also have effects on health and safety at work (an issue brought up, for instance, in Denmark, the Netherlands, Belgium and by some of the Portuguese group).

Non-recyclable paper used in printing was mentioned much less frequently.

- **At the same time, the appearance of 'water-based', 'biodegradable' or more generally**

**less polluting inks or chemical products was a fairly widespread idea in some countries:** mentioned spontaneously, as noted above, in Finland and Sweden, it was also discussed in the Austrian, Dutch and Luxembourg groups.

**Overall, despite fairly accurate knowledge in some countries of the environmental problems connected with printing, this sector did not, in most cases, seem to be the main ‘focus’ of the industry’s detractors.**

□ **Questions about printing enterprises confirmed its relative familiarity, as mentioned at the beginning of this chapter.**

- **Names were cited fairly often,** correctly, and generally of large enterprises: WSOY in Finland, with A-Lehdet, Esselte in Sweden; Mediaprint (and Xerox) in Austria; Euro Screen and Euro Print in Ireland; Dupuis and Rossel in Belgium; Binsfeld, Saint Paul, Editus and Watgen in Luxembourg; Haidemenos, Lycos, Ektipotiki and the major press groups Lambrakis and Tegopoulos in Greece, and the names of major press or publishing houses elsewhere.

Even when people could not think of names of printing enterprises, they generally had an idea of what they were like and what the production process involved (in outline at least).

- Although people’s first thoughts were often about very large and highly automated enterprises, they often felt that there was a sector of SMEs or craft-type industries alongside these major enterprises, possibly specialising in other types of output: an aspect which may help this sector to be seen with a positive slant, or at least more so than the other sectors whose typical image is one of ‘heavy’ industry with production line work and a rigid organisation.

This idea was put forward in Finland, Denmark, Austria (among the adults), the United Kingdom, Belgium, France and Greece; the idea of a sector made up chiefly of small enterprises was also mentioned in Ireland.

□ **As a potential employer, printing seemed much more attractive than all the other sectors analysed in this study.**

Young people in Sweden, Denmark, Ireland, Belgium and Portugal stated that they were

attracted by a possible job in this sector as well as adults in Finland and Spain and participants from both groups in Austria, the United Kingdom, the Netherlands, France and Italy.

**The main reason for this appeal** (strong or relative) **was the sector’s perceived dynamism and, in particular, the important role being played by the information and communication technologies** — in conception or graphic design functions which were seen as both more intellectual and offering more potential for advancement than jobs in industry: this notion was put forward particularly by the youth groups.

The link between printing and publishing, and the value of the information function, was implicitly connected with this.

In some cases, people also mentioned the contacts with customers that printers are assumed to have, and the advisory role that they play with these customers.

When a job in printing was not considered to be very attractive, people had the strict production element of this activity in mind, and thought of unskilled, repetitive and not very creative jobs — and sometimes even of unpleasant working environments that might entail health risks.

- **As for the other sectors, the participants were presented with a short text on printing.**

#### *Printing*

*Paper is used for printing in most applications: books (ranging from art books to paperbacks), newspapers and magazines which are sources of knowledge and objects of pleasure, as well as pre-printed documents which help to rationalise the organisation of enterprises and public authorities while facilitating the lives of those who have to fill them in, whether by hand or by computer.*

*Printing is a very high-performance activity, linked to innovation and to the sector's trades, and is ultra-modern as a result of its use of high-tech computer equipment.*

*Printing is not, however, an industry that merely uses paper; its original activities are nowadays closely interwoven with the information and communication technologies: many printers now keep their customers' text and image files in a fully computerised form, transmitting files by Internet, and are developing new services in these fields.*

*As regards the conventional services of printing on paper, these play a positive role in the environment, as a result both of the ever increasing recycling of printed paper and the research that has successfully been carried out to develop water-based inks and adhesives, non-polluting products to operate or clean machines, or methods of recovering solvents in cases where this was still necessary.*

**There were fairly positive reactions to this text in the different countries and groups — and very rarely any complete rejections.**

- The most open attitudes were in Sweden, Denmark (despite greater reservations among young people), Belgium (among young people), among French adults and in Italy, Spain and Greece; overall, reactions in Finland and Portugal were moderately favourable.

There were more reservations in Germany, Austria, Ireland, the Netherlands and Luxembourg.

- **Overall, the first three paragraphs of the text were not disputed.**

— Most people were already strongly of the view that printing products (on paper) were useful.

— The same applied in general to the modern and innovative nature of this sector; the statement in the second paragraph, supported by the details in the third paragraph, helped, moreover, to modify the fairly traditional perceptions held by some groups (in a minority).

— The third paragraph in some cases provided new information or details that were of interest, and that stepped up the sector's modern image: today's purely digital printing activities (digital storage of text and images, transmission by Internet, etc.).

Some participants did not, however, really understand what was involved and tended to interpret the statement that 'printing is not an industry that merely uses paper' as meaning that it used other physical printing media, rather than its integration of digital media (an issue raised by some Swedes and Greeks).

- **Criticisms concentrated on the final paragraph on the impact of printing on the environment.**

— Criticisms were put forward in particular in Germany, Austria, the Netherlands and Ireland, and in the adult Belgian and young Luxembourg groups.

**They focused on the idea that printing 'plays a positive role in the environment' — a statement that is not, as mentioned before, acceptable in relation to any industrial sector.**

**There were doubts about the actual development of environmentally friendly inks or chemical products: but rather than a block rejection of this statement, people were uncertain or needed further details or proof.**

The same factors lay behind the reactions — questioning and less suspicious — observed in Denmark, among young Belgians, Luxembourg adults, the British and French and the Portuguese.

In the other countries, the text seemed largely credible in this respect and the efforts being made by the sector were positively welcomed.

- **The general tone of the text, although seen in some cases as overly positive and looking through rose-tinted glasses (in Finland, Denmark, Ireland, the Netherlands and Luxembourg), gave rise to much more moderate criticisms than the previous documents presenting other sectors of the industry.**



## Demographic composition of the groups

	Adult groups				Youth groups	
	Gender		Age		Gender	
	Women	Men	25–39	40–60	Women	Men
Germany	4	5	6	3	5	3
Austria	5	5	4	6	5	6
Belgium	4	4	4	4	3	5
Denmark	4	2	4	2	3	4
Spain	4	3	3	4	4	4
Finland	5	3	3	5	6	4
France	4	4	4	4	4	3
Greece	4	4	4	4	4	3
Ireland	4	4	4	4	4	4
Italy	3	4	3	4	3	4
Luxembourg	4	5	6	3	5	4
Netherlands	4	4	3	5	4	4
Portugal	4	4	4	4	4	3
United Kingdom	4	4	4	4	4	4
Sweden	4	3	3	4	5	5



## Discussion guide for group leaders



### THEME I — THE FOREST, FOREST PRODUCTS, AND APPLICATIONS

We are here together today to have a discussion about forests, forest products, and everything that can be done with them. Please tell me everything that comes to mind about this subject, all the ideas and impressions that each of you may have; and then we will discuss this further.

### THEME II — FOREST-BASED PRODUCTS

II.1 Let us talk more precisely about forest-based products, and about the industries or economic sectors which are closely or remotely linked with them.

What are they? Let us try to list all those you can think of.

**Moderator:** Probe on industries/sectors (possibly) not mentioned spontaneously.

II.2 Forest-based products are used in different sectors and have different uses — as we have just seen.

What do they have in common, and what is different between them?

**Moderator:** Probe:

- Positive image items
- Negative image items
- Common/federating image dimensions between the industries/sectors

### THEME III — FOREST MANAGEMENT

III.1 Let us talk about the forest itself, or more precisely about the management of the forest to produce materials used in the different applications we have just been discussing.

What do you know about the economic side of forest management and where do your knowledge or your impressions come from?

What images or ideas come to mind, and what are your views?

III.2 What would you say about the importance and usefulness of forest management today?

III.3 As regards forest management, do you regard it as modern and innovative, or traditional in which there is not much innovation? Let us discuss this.

III.4 Another topic that I would like to discuss regarding forest management is its impact on the environment and what it does in this respect.

What would you say in this respect, what are your views?

III.5 Let us now talk about forest owners. Who are they, what image do you have of them and how would you describe them?

III.6 Naturally, we all work in different sectors, or we have plans to work in areas which don't necessarily have something to do with forest management.

However, I would like to know to what extent this is an area in which you would like or you might have liked to work, and why?

III.7 I will now ask you to have a look at this document presenting forest management, and say what you think about it (Distribution Sheet A)

**Moderator:** Probe:

- Understanding/clarity
- What respondents have learnt by reading the document; what is new to them?
- Overall credibility
- Credibility of each part of the document

#### THEME IV — WOODWORKING INDUSTRIES

IV.1 Let us now discuss one of the industries that uses forest products: the woodworking industry.

What do you know about this industry and about its various products, and where do your knowledge or your impressions come from?

What images and ideas come to mind, and what are your views?

**Moderator:** Probe: the different products that come to mind, and how they are produced.

IV.2 What would you say about the importance and usefulness of this industry and of its products today?

**Moderator:** Probe on the different products.

IV.3 As regards this industry, does it appear to you as modern and innovative, or traditional in which there are few major innovations — and what gives you the impressions you have in this respect?

IV.4 Now, as regards the preservation of the environment, what would you say about this industry, what do you think about it, and where do your opinions or your impressions come from?

IV.5 Let us talk about this industry's companies: what do you know about them, how would you describe them and what image do you have of them?

IV.6 To what extent is it a sector in which you would like or you might have liked to work, why?

IV.7 Here is a short document on this industry. Please look at it, and say what you think about it (Distribution Sheet B)

**Moderator:** Probe:

- Understanding/clarity
- What respondents have learnt by reading the document; what is new to them?
- Overall credibility
- Credibility of each part of the document

#### THEME V — FURNITURE INDUSTRY

V.1 Let us now discuss the furniture industry.

What do you know about this industry and about its various products, and where do your knowledge or your impressions come from?

What images and ideas come to mind, and what are your views?

**Moderator:** Probe: the different products that come to mind, and how they are produced.

V.2 What would you say about the importance and usefulness of this industry and of its products today?

**Moderator:** Probe on the different products.

V.3 As regards this industry, does it appear to you as modern and innovative, or traditional in which there are few major innovations — and what gives you the impressions you have in this respect?

V.4 Now, as regards the preservation of the environment, what would you say about this industry, what do you think of it, and where do your opinions or your impressions come from?

V.5 Let us talk about this industry's companies: what do you know about them, how would you describe them and what image do you have of them?

V.6 To what extent is it a sector in which you would like or you might have liked to work, why?

V.7 Here is a short document on this industry. Please look at it, and say what you think about it (Distribution Sheet C)

**Moderator:** Probe:

- Understanding/clarity
- What respondents have learnt by reading the document; what is new to them?
- Overall credibility
- Credibility of each part of the document

- What respondents have learnt by reading the document; what is new to them?
- Overall credibility
- Credibility of each part of the document

## THEME VI — PULP AND PAPER INDUSTRY

VI.1 Let us now discuss another of the industries that uses forest products: the pulp and paper industry.

What do you know about this industry and about its various products, and where do your knowledge or your impressions come from?

What images and ideas come to mind, and what are your views?

**Moderator:** Probe: the different products that come to mind, and how they are produced.

VI.2 What would you say about the importance and usefulness of this industry and of its products today?

**Moderator:** Probe on the different products.

VI.3 As regards this industry, does it appear to you as modern and innovative, or traditional in which there are few major innovations — and what gives you the impressions you have in this respect?

VI.4 Now, as regards the preservation of the environment, what would you say about this industry, what do you think about it, and where do your opinions or your impressions come from?

VI.5 Let us talk about this industry's companies: what do you know about them, how would you describe them and what image do you have of them?

VI.6 To what extent is it a sector in which you would like or you might have liked to work, why?

VI.7 Here is a short document on this industry. Please look at it, and say what you think about it (Distribution Sheet D)

**Moderator:** Probe:

- Understanding/clarity

## THEME VII — PAPER AND BOARD-CONVERTING INDUSTRY

VII.1 Let us now discuss the paper and cardboard-converting industry

What do you know about this industry and about its various products, and where do your knowledge or your impressions come from?

What images and ideas come to mind, and what are your views?

**Moderator:** Probe: the different products that come to mind, and how they are produced.

VII.2 What would you say about the importance and usefulness of this industry and of its products today?

**Moderator:** Probe on the different products.

VII.3 As regards this industry, does it appear to you as modern and innovative, or traditional in which there are few major innovations — and what gives you the impressions you have in this respect?

VII.4 Now, as regards the preservation of the environment, what would you say about this industry, what do you think about it, and where do your opinions or your impressions come from?

VII.5 Let us talk about this industry's companies: what do you know about them, how would you describe them and what image do you have of them?

VII.6 To what extent is it a sector in which you would like or you might have liked to work, why?

VII.7 Here is a short document on this industry. Please look at it, and say what you think about it (Distribution Sheet E)

**Moderator:** Probe:

- Understanding/clarity
- What respondents have learnt by reading the document; what is new to them?

- Overall credibility
- Credibility of each part of the document

## THEME VIII — PRINTING INDUSTRY

### VIII.1 Let us now discuss the printing industry

What do you know about this industry and about its various products, and where do your knowledge or your impressions come from?

What images and ideas come to mind, and what are your views?

**Moderator:** Probe: the different products that come to mind, and how they are produced.

### VIII.2 What would you say about the importance and usefulness of this industry and of its products today?

**Moderator:** Probe on the different products.

### VIII.3 As regards this industry, does it appear to you as modern and innovative, or traditional in which there are few major innovations — and what gives you the impressions you have in this respect?

### VIII.4 Now, as regards the preservation of the environment, what would you say about this industry, what do you think of it, and where do your opinions or your impressions come from?

### VIII.5 Let us talk about this industry's companies: what do you know about them, how would you describe them and what image do you have of them?

### VIII.6 To what extent is it a sector in which you would like or you might have liked to work, why?

### VIII.7 Here is a short document on this industry. Please look at it, and say what you think about it (Distribution Sheet F)

**Moderator:** Probe:

- Understanding/clarity
- What respondents have learnt by reading the document; what is new to them?
- Overall credibility
- Credibility of each part of the document

## THEME IX — FINAL OVERALL VIEWS

We have been discussing the different industries and products that are linked to forests in one way or another.

Following this discussion, what would you now say, from a general perspective?

**Moderator:** Probe:

- What the different forest-based industry sectors have (or not) in common
- Interest in/attractivity of the forest-based industries (which ones)
- Major positive/negative image dimensions of the forest-based industries (which ones)
- Any changes of views compared with the beginning of the discussion

# More information on the Enterprise DG



Additional useful information on the work of Commissioner Erkki Liikanen and the Enterprise DG is available through printed publications and on the web.

## **Commissioner Erkki Liikanen, responsible for Enterprise and the Information Society:**

[http://europa.eu.int/comm/commissioners/liikanen/index\\_en.htm](http://europa.eu.int/comm/commissioners/liikanen/index_en.htm)

## **Enterprise DG on the web:**

[http://europa.eu.int/comm/dgs/enterprise/index\\_en.htm](http://europa.eu.int/comm/dgs/enterprise/index_en.htm)

## **Forest-based industries web site:**

[http://europa.eu.int/comm/enterprise/forest\\_based](http://europa.eu.int/comm/enterprise/forest_based)

## **CORDIS (Community Research and Development Information Service):**

<http://www.cordis.lu>

## **Enterprise DG work programme:**

[http://europa.eu.int/comm/dgs/enterprise/work\\_programme\\_2002.htm](http://europa.eu.int/comm/dgs/enterprise/work_programme_2002.htm)

## **Enterprise DG's printed publications:**

<http://europa.eu.int/comm/enterprise/library/index.htm>

## **Newsletters**

*Enterprise Europe* is a free-of-charge newsletter published quarterly in the 11 Community languages by the Enterprise DG. It covers the whole range of Enterprise DG's work, announcing new initiatives as well as providing practical information:

<http://europa.eu.int/comm/enterprise/library/enterprise-europe/index.htm>

*Cordis focus* is published twice a month in English, French, German, Italian and Spanish. It provides a review of the main developments in all aspects of European Union research and innovation activities, covering general policy developments, programme implementation, calls for tenders and results, events, legislative activities, and much more:

<http://www.cordis.lu/focus/en/src/focus.htm>

*Innovation and Technology Transfer* is published six times a year in English, French, German, Italian and Spanish by the European Commission's Innovation Programme, which aims to promote innovation at Community level and encourages SME participation under the fifth research framework programme.

The emphasis is on timely news relevant to these objectives and in-depth 'case studies' of successful projects:

<http://www.cordis.lu/itt/itt-en/home.html>

*Euroabstracts* is published six times a year in English by the 'Innovation and SMEs' programme, part of the European Commission's fifth research framework programme. The 'Innovation and SMEs' programme promotes innovation and encourages the participation of small and medium-sized enterprises in the framework programme:

<http://www.cordis.lu/euroabstracts/en/home.html>

*European Trend Chart on Innovation newsletter*. The 'Trend Chart' project develops practical tools for innovation policy-makers in Europe. It pursues the collection, regular updating and analysis of information on innovation policies at national and Community levels. The newsletter is published quarterly in English, French and German. Further reports and studies are available on the web site:

<http://trendchart.cordis.lu/Reports/>

## Enterprise

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Cat. No NB-AE-02-002-EN-C

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*Innovation and competitiveness in European biotechnology. Enterprise Papers No 7, 2002.* A. Allansdottir, A. Bonaccorsi, A. Gambardella et al. Office for Official Publications of the European Communities, Luxembourg, 2002. 112 pp. (EN).  
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*External services, structural change and industrial performance. Enterprise Papers No 3, 2001.* M. Peneder, S. Kaniovski, B. Dachs. Office for Official Publications of the European Communities, Luxembourg, 2001. 36 pp. (EN).  
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*Innovation and enterprise creation: statistics and indicators,* Office for Official Publications of the European Communities, Luxembourg, 2001. 300 pp. (EN).  
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*Building an innovative economy in Europe*, Office for Official Publications of the European Communities, Luxembourg, 2001. 67 pp. (EN). EUR 11.50.  
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*European SMEs and Social and Environmental Responsibility. No 4, 2002*. Office for Official Publications of the European Communities, Luxembourg, 2002. 72 pp. (DE, EN, FR).  
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*Regional Clusters in Europe. No 3, 2002*. Office for Official Publications of the European Communities, Luxembourg, 2002. 64 pp. (DE, EN, FR).  
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