

THE BOOK CHAIN PROJECT

Impact Report 2006-2020



THIS REPORT WAS WRITTEN BY

Daniel Witte, Neil Everett, Stephanie Attal-Juncqua, Hattie Godber and Lei Sun

PRODUCED BY

The Book Chain Project, an initiative run by Carnstone Partners Ltd.



The Book Chain Project has been building better supply chains for books since 2006. A collaborative project run by Carnstone, we involve 28 leading book and journal publishers, over 400 print suppliers, and more than 300 paper manufacturers. What started life as three separate projects – PREPS, PIPS and PRELIMS - became a single platform in 2016, called the Book Chain Project. Our tools help publishers make informed buying decisions.

bookchainproject.com

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p a r t n e r s l t d

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Introduction

Book Chain is a collaborative project made up of 28 publishers that have come together to drive sustainability across the supply chain. In this report we look back at the last 15 years of the project, from 2010 up to today, and the impact we have had across our three workstreams: Forest Sourcing, Labour & Environment, and Chemicals & Materials.

Our publishers range from large companies to SMEs. We're very proud that the project has been able to include companies of all sizes, with each contributing something important to the whole. We have academic, children's, educational and trade publishers, with some working across all four disciplines.

Clearly the greatest impact our publishers have on society is through the content they produce and the power it has to inform and delight the reader. At the same time, publishing supply chains are complex and can be high-impact and high-risk, if not managed appropriately. Our focus is on continuing to help our publishers build better supply chains, responding to the sustainability challenges we face, and ensuring that those books are made responsibly.

OUR FOCUS IS ON CONTINUING TO HELP OUR PUBLISHERS BUILD BETTER SUPPLY CHAINS, RESPONDING TO THE SUSTAINABILITY CHALLENGES WE FACE, AND ENSURING THAT THOSE BOOKS ARE MADE RESPONSIBLY.

At the heart of the project is the strong belief that, through this collaboration, we're able to increase leverage and drive improvements. The work that we do is governed by our Production Director working group that meets twice a year. These are the senior commercial staff within each publishing house that lead the procurement of paper and print services.

Together, we've engaged directly with over 280 of the world's largest paper mills across 47 countries, and over 304 print sites and other supplier partners. Alongside this, we engage with NGOs, experts in areas such as forestry, chemical legislation, and labour standards, academic organisations and other key stakeholders to help keep our publishers informed.

Highlights over the last 10 years' include: the development of our Mill Assessment Framework to support the capacity of those paper mills to build sustainable wood fibre supply chains; our work with printer sites in China to improve social insurance uptake and health and safety for workers; and our collaborative research into alternative material and design choices to embed sustainability in book design.

The report takes us up to the end of the first quarter in 2020, as the global pandemic started to be felt across the world. In response, we've been keeping publishers up to date with what's been happening across global supply chains. We've been working to increase information for workers on how to access social insurance at a time of increased job uncertainty. We've shared health and safety good practice from our Chinese suppliers with those suppliers in other countries as they began to restart production. And we've put together guidance for production staff on how to responsibly engage suppliers at this challenging time, to help those suppliers keep workers safe.

Whilst we've reoriented some of our activity to support suppliers during the global pandemic, we've continued to focus on the underlying challenges we face, most notably the climate emergency. The report ends with a look ahead to the next 10 years and how we'll be supporting our publishers with the commitments they are making.

We hope you enjoy reading this report.

2020



History of the Book Chain Project

2006

In 2006 a group of 10 publishers met at Penguin's London HQ to talk about the impact of paper sourcing on deforestation around the world.

The publishers in the room had a clear understanding of the potential links of paper to extensive deforestation around the world, particularly in South East Asia. The challenge was getting accurate and timely information on the forest sources – particularly on species and country of harvest – going into potential paper choices. This was complicated because paper was rarely being bought directly from the paper mill, instead being bought by the printer, often through a paper merchant operating between them and the mill.

From that first meeting, the early phase of the Book Chain began, with the collaborative forest sourcing platform called **PREPS** (now known as **Forest Sourcing**). We started by going straight to the paper mills and asking them directly for information on their sourcing practices and forest sources. By engaging with forest experts around the world, developing country guides to help inform publishers, and creating tools to help them make day to day buying decisions, we built our collective knowledge.

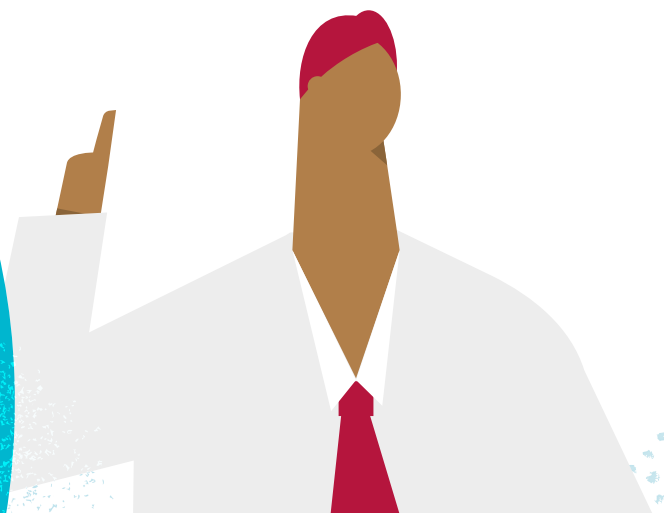
Building on the success of our forest sourcing work, we applied the same model of collaboration and engagement to the first tier of the supply chain, the printers our publishers directly work with.

This project was called **PRELIMS** (now known as **Labour & Environment**) and looked at labour and environmental standards across the supply chain. We did this through the creation of an industry Code of Conduct, audit sharing, self-questionnaires and special projects. While we focussed on printers initially, now we engage with a wide variety of first-tier suppliers.

The final piece of the jigsaw was the chemicals and materials component of the project, called **PIPS** (now known as **Chemicals & Materials**). On this platform, we gather chemical information direct from suppliers and screens this against a database of both current chemical legislation as well as potential areas of emerging concern. Through collaborative research, we have built our knowledge of how chemicals are used in the book making process, and our understanding of the pros and cons of various material and design choices.

With **Forest Sourcing**, **Labour & Environment** and **Chemicals & Materials** we now had three separate projects which captured information on the 'full story of the book' – the whole book supply chain from the forests going into the paper, through to the ink and varnishes that are used to print the book, and the manufacturing of the book. So, in 2016 we decided to bring these projects together under the Book Chain Project. With all of the actors – mills, suppliers and publishers – collaborating, interacting and feeding information into one shared system, we are able to take a holistic, joined-up approach on driving responsible supply chains for the publishing industry.

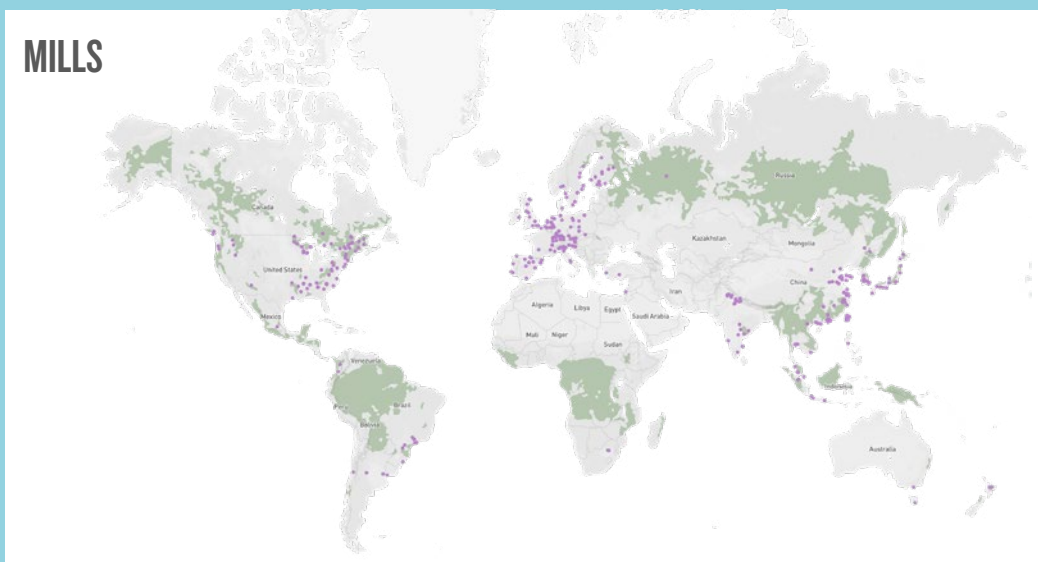
2016



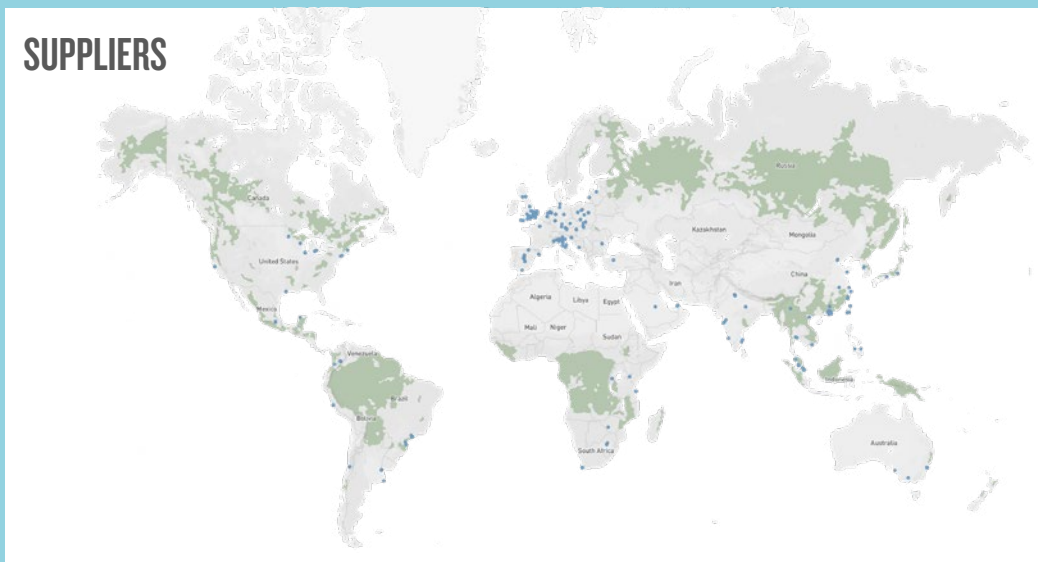
Our Reach

Around 280 mill and 300 supplier sites actively engage with the Book Chain Project. With this broad geographic reach, the Book Chain Project provides a wealth of information on the book supply chain. This allows us to gather a comprehensive picture of the industry, benchmark performance among peers and between geographic regions, and share best practice far and wide.

MILLS



SUPPLIERS



ON THE WEB

6,800+
unique web visitors in 2019

3,196
resource downloads since July 2019

DOWNLOADS

Most popular resources:

1. Supplier Code of Conduct	543
2. Forest country risk tool	429
3. The future of the printed book	380
4. Mill assessment guide	248
5. Mill assessment scoring framework	245
6. Plastics guide for publishing	189

PUBLISHERS

29 publishers*

(see *Who's Involved* for a full list)

Combined revenue
2018/2019:

£31.3 bn*

*Excluding Chronicle, Imago and Welbeck as data not available

NEWSLETTER

Newsletter for publishers,
suppliers and mills:

1,163
recipients*

31.4%
average open rate*

*Average between May 2019 and May 2020.

IN PERSON

BCP year 2019/20

100 publisher
users
trained

9 face-to-face
meetings

30 attendees
at China mill
workshop

3 presentations
at external
events

Our Work

CHEMICALS & MATERIALS

In 2010, in response to changes in European Union (EU) and United States (US) chemical safety legislation, publishers decided to work together on a shared platform. The EU REACH and the EU Toy Safety Directive were the driving forces, introducing stricter reporting requirements and limits on the use of certain chemicals. One of the requirements of the EU Toy Safety Directive is to create technical files for each product marketed in the EU. As part of the technical file, you must include a list of components and chemicals used in the product.

Our Chemicals & Materials tool allows suppliers to submit exact chemical breakdowns of each book component, for example ink, varnish, and adhesives. The results are screened against chemical safety legislation in different jurisdictions. This quickly shows a publisher where restricted or controlled substances are being used. This allows them to take the necessary steps to comply with legislation controlling a specific substance and/or flag any concern with their suppliers who, if need be, can start working on substituting a component with another less harmful alternative.

As of the publication date of this report, this tool includes 42 different legislative lists of chemicals covering 5 different jurisdictions (Australia, Canada, EU, US, and South Korea). Lists are under constant review to monitor changes and prepare for new additions (please see examples of the lists included in figure 1).

THIS TOOL INCLUDES 42 DIFFERENT LEGISLATIVE LISTS OF CHEMICALS COVERING 5 DIFFERENT JURISDICTIONS

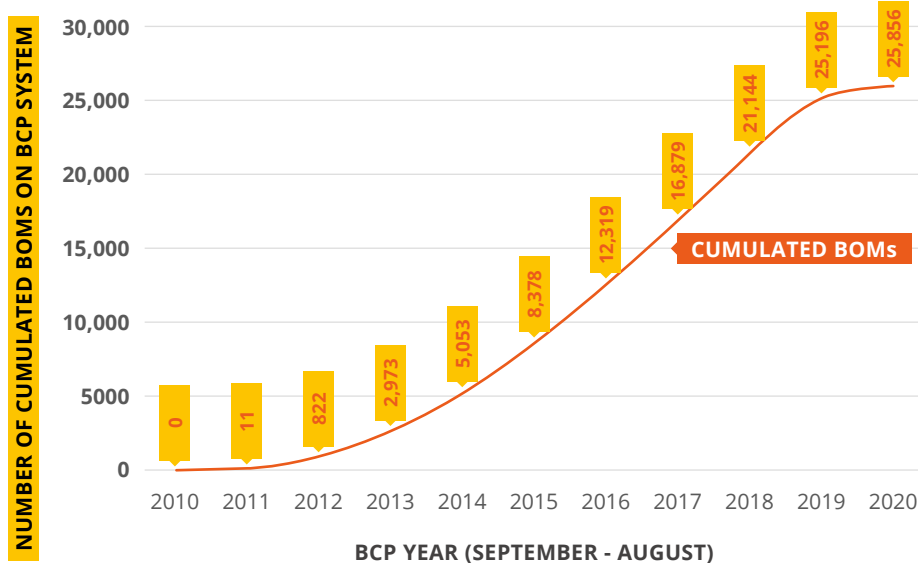
Figure 1

LEGISLATIVE LISTS

AUSTRALIA	CANADA	EU	US	SOUTH KOREA	PRECAUTIONARY LIST
↓	↓	↓	↓	↓	↓
1 legislative list	1 legislative list	13 legislative lists	25 legislative lists	2 legislative lists	2 legislative lists
↓	↓	↓	↓	↓	↓
Safety of Toys - Migration of elements	Canada Consumer Product Safety Act (CCPSA)	REACH (Annex XV11 / XIV, Candidate list etc.), Toy Safety Directive & CMR substances	Consumer Product Safety Improvement Act & all state specific legislation e.g. California - Proposition 65	The Special Act on Children Product Safety	SIN & ZDHC-MRSL

Each legislative list is assigned a flag (green/amber/red) to indicate to the publisher whether a chemical is listed in one of the legislative lists and if any specific requirement is needed in each jurisdiction. As a group we always strive to go beyond legislation and avoid substances that may be considered as potentially harmful by other stakeholder groups. For example, we use an amber flag for any substances that are added to the EU 'Proposals to the Candidate' list or the 'Registry of Substances of Very High Concern Intention' list so that publishers and suppliers can start the process of finding substitutes for those chemicals that may be added to the EU Candidate List in the future. In the last few years, we have also actively identified key chemicals from California Proposition 65 that the publishers have decided to avoid and phase out from their products. Similarly, the publishers in this group have decided to phase out the use of Toluene in their products. Toluene is a chemical that can be contained in adhesives and varnishes used on books and toys, which is regulated in the EU. It usually evaporates and would not be found present in the final product, however, we consider it good practice to eliminate it from use during the manufacturing processes due to the risk it can cause to workers. More recently, we have added to additional screening lists on the system to continue our precautionary approach to chemical safety.

Figure 2
BILL OF MATERIALS



We have recorded a high level of activity on this tool, with publishers and suppliers alike using it to communicate with each other and complete the Bill of Materials (BOMs) needed by the publishers. Since 2011, over 25,000 BOMs have been finalised on the system – this represents over 22,534 titles and over 25,000 print-runs (figure 2).

These years refer to Book Chain Project years, which run September to August. '2020' refers to the 12 months from September 2019 to August 2020.

IN 2018, THE WORLD'S FOCUS TURNED TO PLASTIC POLLUTION AND SINGLE-USE PLASTICS...



More recently, we have started to look further into specific materials used in book manufacturing. In 2018, the world's focus turned to plastic pollution and single-use plastics, with consumers calling on legislators and businesses to reduce their

use of single-use plastics. In keeping with the aims of the Book Chain Project, we've produced a guide – *Plastics: A Guidebook for Book Chain Project Publishers* – to help our publishers make informed decisions around the design, purchasing and production of their books, magazines and journals. It shares an overview of the situation today, looks at some of the common misconceptions around plastic, charts the new developments in this area, and presents good practice from other sectors. We conclude with five specific recommendations to help our publishers to make informed decisions, innovate, and use plastic responsibly.

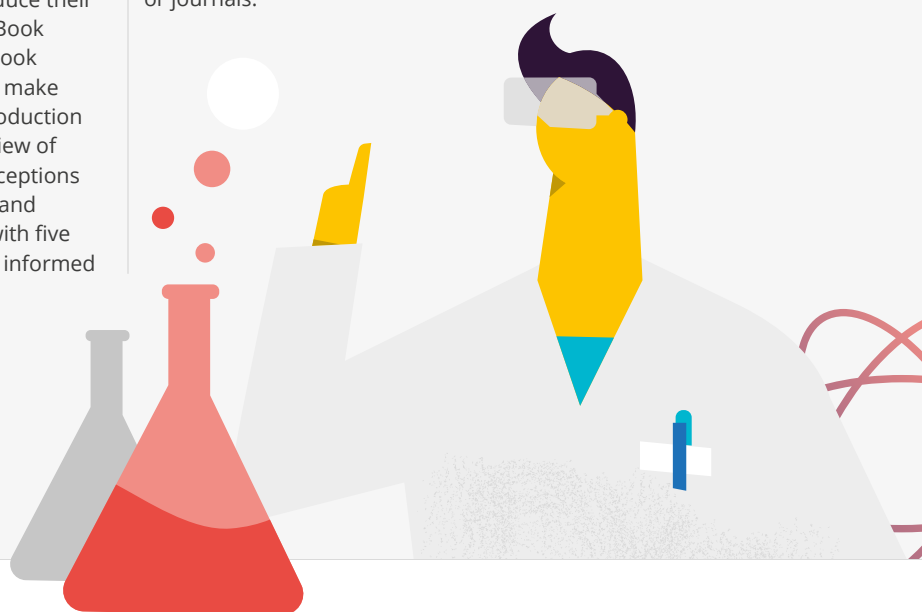
[You can find the Guidebook online here.](#)



'Designing for Sustainability' has been a growing concept in the last few years.

By adopting a more holistic life-cycle perspective, there is an opportunity to make design decisions which will seek to reduce or prevent the negative environmental and social impacts that are

involved in the publishing industry. As a collective, one area the Book Chain Project had yet to explore in detail was around how design decisions can embed sustainability opportunities upstream in the supply chain. How a book is designed determines what materials a book is made from, and in turn, the processes used to make the book. This can impact the lifecycle of the book in the future. We developed a Design Guide in 2020 to assist all design decision-makers in the publishing industry to make informed decisions about the materials and processes they are using in their books, magazines or journals.



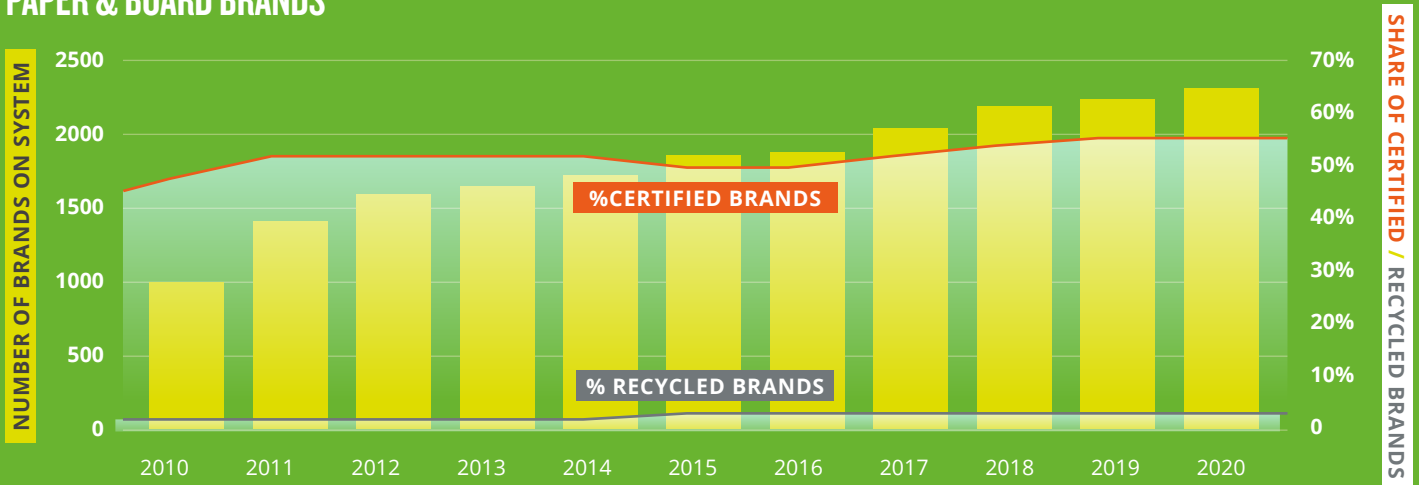
FOREST SOURCING



The Forest Sourcing workstream engages with paper mills to collect and analyse the origins of tree fibres used in paper and board. Since getting started in 2006, we have steadily increased the number of mills we engage with, leading to an ever-growing database of paper and board brands used in publishing. Figure 3 shows the increase in the number of brands we hold data on over time, including the share made up by certified and recycled brands.

Figure 3

PAPER & BOARD BRANDS



Box 1 RISK TOOLS

Forest risk tool screens each country for deforestation risk and transshipment risk. Deforestation risk is determined through FAO Global Forest Resources Assessment and Global Forest Watch forest cover data; transshipment risk is determined through FAO trade flow data and Transparency International's Corruption Perceptions Index.

Species risk tool screens our list of over 400 species known to be used in pulp production against the IUCN Red List of Threatened Species and the three CITES (Convention on International Trade in Endangered Species) Appendices.



To help publishers make informed buying decisions, we conduct a desk-based risk assessment of the forest source data we receive from the paper mills. This includes screening species, countries of origin and supplier certificate numbers; box 1 summarises our various risk tools. We distil this risk assessment into a single grade per paper brand, based on the lowest common denominator found within its forest sources, as set out in our [grading system](#). This allows participating publishers to identify responsible forest sources for their books and journals. Of the 27 publishers that participate in the Forest Sourcing workstream, 85% have a publicly available responsible sourcing policy and 56% have a public policy that mentions the BCP Forest Sourcing tool as part of its requirements.

Figure 4
MILL ASSESSMENT VISITS



In 2018, we started developing a Mill Assessment Framework to guide a new programme of engagement with key paper mills on their responsible sourcing programmes. While gathering and grading forest source data will remain a key part of our work in helping participating publishers to source responsibly, we realised that the complex and inter-linked issues of deforestation and dynamic sourcing patterns required building a better understanding of paper mills' capacity to practically manage responsible sourcing of their forest products. Through this Framework, we set expectations around six steps of responsible sourcing (see figure 5), inspired by the Accountability Framework Initiative's Operational Guidance documents. We have conducted 10 visits to date (see figure 4) and will continue to build capacity in paper mills and support them in meeting their clients' expectations.



Figure 5

SIX STEPS OF RESPONSIBLE SOURCING

-  Right People, Right Conversation
-  Capability & Resourcing
-  Supply Chain Assessment & Management
-  Supplier Engagement
-  Ambition and Commitment
-  Wastewater treatment

IN RECENT YEARS, CLIMATE CHANGE HAS RISEN ON THE AGENDA AND DEFORESTATION IS ONE OF THE KEY DRIVERS...

As the key issues of deforestation and responsible forestry evolve, we aim to evolve with them to help our participating publishers navigate this space. In recent years, climate change has risen on the agenda and deforestation is one of the key drivers according to the [Intergovernmental Panel on Climate Change](#). At the same time, responsible forestry can be part of the solution. To address this, we have revamped the Environmental Questionnaire that already existed under the Labour & Environment workstream with a new section on energy and carbon emissions, and will be using new data gathered from paper mills to benchmark intensity metrics against the [Transition Pathway Initiative's sectoral decarbonisation scenarios](#) and identify hotspots in the industry to focus on in the future.



LABOUR & ENVIRONMENT

The Labour & Environment workstream sets publishers’ expectations on labour practices and environmental management for their print suppliers globally. It hosts the publishing industry [Code of Conduct](#) which clarifies minimum standards expected from suppliers. The Code covers labour, health and safety and environmental standards; expectations around subcontracting; and land and indigenous peoples’ rights in order to drive social and environmental responsibility across publisher supply chains. The Labour & Environment workstream encourages print suppliers to share ethical audits across relevant publishers (including ICTI, SMETA, SA 8000, WCA, and BSCI Amfori) in order to prevent audit fatigue. Suppliers are also expected to self-assess themselves through our Environmental Questionnaire.

Since its launch in 2006, we have seen steady growth in shared audits (figure 6) and environmental questionnaires (figure 7). In 2020 we launched a Supplier Dashboard to help publishers visualise their suppliers’ audit findings in the system and encourage further engagement with suppliers. Over 587 non-conformity findings from 151 recent audits (2018-2020) have been updated on the database.

Figure 6
NO. OF AUDITS SHARED

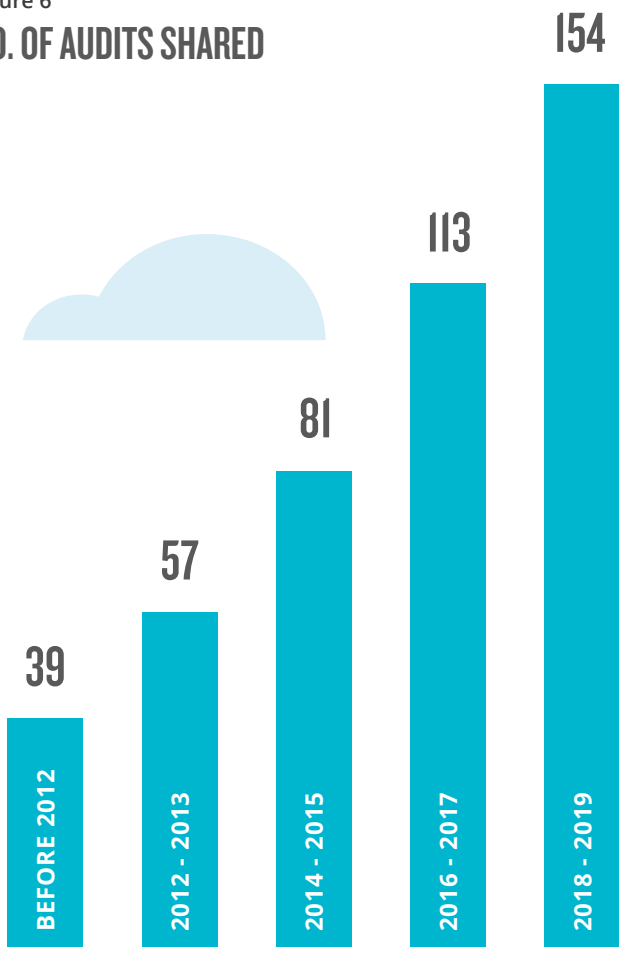
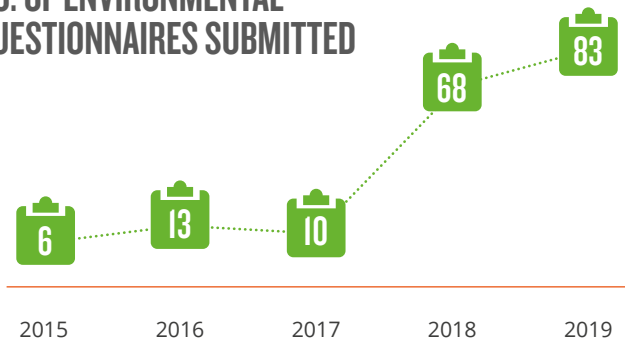


Figure 7

NO. OF ENVIRONMENTAL QUESTIONNAIRES SUBMITTED



While auditing is an important first step in the human rights due diligence process, supplementary support for suppliers is needed to build their capability to meet the Code of Conduct. In 2018, the Labour & Environment workstream developed its first special project – [Promising Futures](#) which focuses on the emerging issue of social insurance¹ in China. The project aims to increase the awareness of social insurance and improve the dialogue between employers and employees on offering social insurance. To do that, a short story video, an informative website, worker advice line, and channel to share policy updates and employee FAQs with managers were produced and promoted to the participating factories. Nine key Chinese print suppliers participated in the project and over 1,463 employees followed the project media channel and studied the educational video. Both workers and factory managers sent back positive feedback.

¹ Social insurance is an important safety net for the country’s workforce in China. It includes medical insurance, pensions, unemployment insurance, work injury insurance and maternity insurance. According to the [Social Insurance Law](#), enrolling employees is a legally mandated requirement.



Building on the success of the Promising Futures Project, in 2019, another special project – [Creating Safer Workplaces](#) launched to tackle health and safety issues in factories. It is a two-year project that supports factory managers to better handle health and safety issues through best practice sharing between peers, and to raise worker awareness on health and safety. A training webinar was delivered alongside a Health & Safety Best Practice Guidebook, which was produced in both Mandarin and English.

An emerging issue we have seen in the industry over the past few years has been responsible recruitment – particularly in Malaysia, the Philippines and the Middle East.. In response to this we have created a Best Practice Overseas Migrant Recruitment document to help guide suppliers on the recruitment practices that are expected by publishers (and required in our Code of Conduct). We have partnered with a leading audit firm to develop a Responsible Recruitment audit module, which can be an add-on to existing third-party audits in areas with a high proportion of migrant labour. This is in addition to our PRELIMS audit, which audits suppliers beyond the usual third-party expectations, to ensure they are meeting the Book Chain Project Code of Conduct where it goes above and beyond customary practices and regulations.

CREATING SAFER WORKPLACES LAUNCHED TO TACKLE HEALTH AND SAFETY ISSUES IN THE FACTORIES

The Environmental Questionnaire covers a number of topics from water and waste, to energy-consumption and chemical use. In 2020, we opened the questionnaire out to include not only printers but paper mills as well, and revamped it to focus more on Greenhouse Gas (GHG) emissions and climate impacts. We will continue to identify emerging areas of focus going forwards in order to reduce the impact of the global paper and pulp industry.

In response to the Covid-19 crisis, recognising the impact the disrupted supply chains would have on workers across the publishing industry, the Book Chain Project released a number of documents to help support publishers and their suppliers during this time. These documents covered both improving supply chain resilience now and in the future, as well as guidance on restarting operations post-lockdown.



Collaborations



All our processes continue to evolve, as they have since the Project first started in 2006. We are always open to hearing about new conversations, concepts and technologies. Occasionally, we collaborate with other organisations where our combined knowledge, skills and/or geographic reach is mutually beneficial. Some examples are highlighted below.

Forest Sourcing

ACCOUNTABILITY FRAMEWORK INITIATIVE

The Accountability Framework is a set of common norms and guidance for establishing, implementing, and demonstrating progress on ethical supply chain commitments in agriculture and forestry. Through its guiding principles, the Accountability Framework sets a clear bar for the level of accountability that environmental NGOs expect from forest product companies, while the detailed operational guidance offers a set of practical resources for implementing ethical forest sourcing commitments in complex supply chains. BCP was inspired by the Accountability Framework initiative's initial draft documents which served as inspiration when the Mill Assessment Framework (see [Our Work – Forest Sourcing](#)) was developed. We received helpful feedback on our internal visit guidance and scoring tools from the initiative and partnered on a public case study on how the Accountability Framework was applied in the publishing industry. This case study will be published later in 2020.

Chemicals & Materials

UL BASINGSTOKE

A central part of the Chemicals & Materials workstream is legislation. We regularly update publishers on chemicals being added/removed from different legislative lists and we flag chemicals of concern on the system.

Another vital aspect of chemical safety legislation is around product safety testing requirements. For this, we invite an expert from UL to our regular forum meetings who shares key product safety testing requirement updates with the group.

A special thank you to Richard Smart, the Site Lead for Consumer and Retail Services at UL Basingstoke for attending our Forum Meetings for the last few years. Richard has given us important information on testing, and answers specific publisher questions on any safety topics.

Labour & Environment

SGS

BCP allows suppliers to upload one audit (from a set list of accepted audit types) to the platform and share it with any or all of the publishers that they work with. This reduces audit fatigue for the supplier, meaning that there is more time for them to concentrate working with publishers to remediate any issues found.

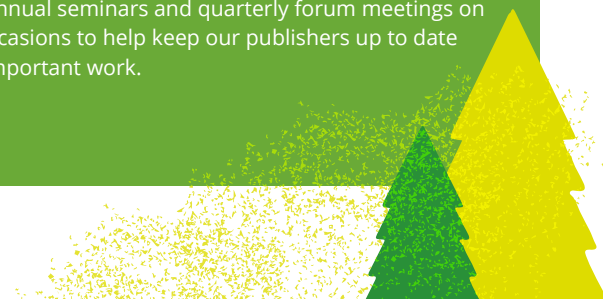
We also have a BCP Audit, this is a **SEDEX SMETA** audit which covers additional BCP requirements. It also includes optional additional hotspot audit modules based on country or sector level risk. For example, we have a Responsible Recruitment additional module which we are rolling out in certain countries in South East Asia. SGS is our preferred audit company to carry out these BCP audits. We have worked closely with SGS over the past 10 years and really value their input and insight. We are particularly thankful to Effie Marinos, Global Technical Governance Manager.

Forest Sourcing

FOREST CERTIFICATION SCHEMES

At the heart of the work we do to support responsible sourcing of forest materials is our paper grading process (see [Our Work – Forest Sourcing](#)). We use robust forest certification schemes as the foundation of our grading, demonstrating mitigation of risk through third party certification at the forest level and beyond through the chain of custody process. In doing so, we are promoting and rewarding those paper mills that have Forest Stewardship Certification (FSC) and The Programme for the Endorsement of Forest Certification (PEFC) chains of custody in place and are sourcing certified material.

We engage regularly with both FSC and PEFC to understand how their schemes are developing, and both have joined our BCP annual seminars and quarterly forum meetings on regular occasions to help keep our publishers up to date on their important work.



Future-gazing

2020

Three years ago, we wrote a report called the Future of the Printed Book¹, asking whether the printed book would become a thing of the past. We concluded that it was very much here to stay, driven in part by the reader's need to escape from the digital world².

As we began to write this report the global pandemic hit. Indications are that sales of books have grown significantly during the early period of this pandemic³, perhaps a sign that we do all need a bit of escapism at this very difficult time.

The pandemic has meant that we've had to change how we work, delivering capacity building activities in the supply chain remotely, producing new guidance and support to respond to immediate issues of concern such as workplace safety in a Covid-19 world. However, our objective remains the same and, if anything, the pandemic has amplified the issues that we were set up to respond to. It has shown us the importance of biodiversity and how we interact with the natural world. And it has shown us the vulnerability of workers in extended global supply chains.

As we look ahead to the next 10 years we want to continue to provide the tools, information and insights our publishers need to build better supply chains, from forests through to printing and packaging materials. We're building a roadmap to support our publishers to make longer-term commitments, and we'll be engaging with paper mills and printers across the globe to help deliver those commitments.

SO, WHAT MIGHT OUR 2030 IMPACT REPORT SAY?

Well for a start, we can expect digital print quality to continue improving, meaning that we'll see a growth in print on demand, printing closer to market and, as a result, fewer book miles and lower inventories all having positive impact on waste and inputs.

As we continue to improve our collection of Scope 3 GHG emissions data for the book supply chain, we can expect to see publishers using that information to set targets and commitments and select paper types and print locations in support of those targets.

The next ten years and beyond



One publisher famously had a clock in the lobby of its head office counting down to their complete switch to digital. Their deadline of August 2015 has since passed. The clock has stopped ticking but content continues to be printed.

So what is the future of the printed book and what implications might this have for the way PREPS and the Book Chain Project work? Here we make some predictions, and then reflect on what this might mean for PREPS and the Book Chain Project.

Escapism In A Digital World



In an age of digital overload, with artificial intelligence influencing our lives and the content we see, when it comes to reading for pleasure, the printed book will remain in demand.

The printed book will remain strongest in children's publishing where a high proportion of books are bought as gifts, and by parents, but we predict printed books will also remain resilient in adult trade publications, particularly novels.

We'll show how our publishers are using the design guide and the information we gather on chemicals, paper and forest sources and other material inputs, to design for circularity with recycled materials, and finishes that allow for easy efficient recycling of books.

Finally, we'll be continuing to demonstrate how our work with suppliers helps them to provide decent workplaces for all, reporting on programmes that address local conditions in key sourcing markets.

And, who knows, we might even be reporting about the emergence 'new' business models, with more rental and less ownership. What might we call that? Oh, yes, a library!

2030

¹ The Future of the Printed Book, March 2017, Book Chain Project; <https://bookchainproject.com/resources?name=future%20of%20the%20printed%20book>

² The Future of the Printed Book, p.45

³ <https://www.bbc.co.uk/news/entertainment-arts-52048582>

Who's involved

THE PUBLISHERS

The Book Chain Project involves 29 leading book and journal publishers.

EGMONT



ÇAPPELEN DAMM



SPRINGER NATURE

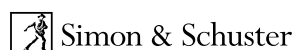


WILEY

Penguin
Random
House



OXFORD
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BONNIER
Books



CONTACT

Get in touch with the team to find out more about the Book Chain Project.

info@bookchainproject.com

bookchainproject.com

Carnstone Partners LTD

Durham House
Durham House Street
London
WC2N 6HG

