

Culture, Consumption and CR – The Case of the German Clothing Sector

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Abstract

To further sustainability through CR not only companies but different stakeholders, especially the consumers, have to make up leeway. While studies are reporting a high number of consumers who state a willingness to consider social and environmental aspects, this is not backed up by market data. Not only is there a huge gap between attitudes and behaviour, but the stated attitudes are questionable as well. Mostly qualitative interviews with close to 200 consumers of all ages and social groups showed that established cultural patterns dominate consumption decisions. Sustainability is only weakly embedded in culture and the majority of consumers still are widely uninformed about the respective social and environmental problems and options for action. Discount culture, fashion culture and beliefs on the role of the state superimpose sustainability values – if there are any – and account for large parts of the attitude-behaviour-gap, forming considerable barriers for sustainability.

Keywords: Corporate Responsibility, Consumption, Culture, Clothing

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Introduction

In this paper we take a more pragmatic market-oriented view on CR. Nevertheless, two aspects of CR are important to define. First, we see CR as part of the larger normative framework that is Sustainable Development. CR is Sustainability on the corporate level, comprising everything with positive social and/or environmental impact that is not legally regulated (Loew, Ankele, Braun, & Clausen 2004). CR activities have to be evaluated against this background. Second, we focus on the way profits are generated and not the way profits are used. CR is considered a part of the core business. Corporate giving and sponsoring are creditable but the centre of CR is not „do good“, but „first, do no harm“ (Palazzo, 2010). A socially and ecologically responsible performance along the complete supply chain is expected.

CR is unquestionably of growing relevance for companies. Studies often point to CR-market dynamics as a self-reinforcing process (e.g. Strong, 1996): Pressuring stakeholders and media coverage, the (subsequent) increased level of information (Berry & McEachern, 2005), the growing number of sustainability-oriented companies, better availability of more sustainable products, all this leads to a change of attitudes of consumers and companies as well. Market success of sustainability-oriented companies lets others follow. Even companies are expected to pressure each other, most notably CR-demands on suppliers as part of larger companies' CR-activities.

This often comes in the company of references to high growth rates. All of these factors can reinforce each other, but are they really observable and where do/ could they come from?

Market Dynamics for CR

To further sustainability via CR, the latter has to be perceived as a success factor by companies. Internal organisational improvements are reported (e.g. Hammann, Habisch, & Pechlaner, 2009), but are hard to measure conclusively, depend on other “weak” factors such as corporate culture and can not be generalised as success factors (Walther & Schenkel, 2010). More important are market effects. Here, we can differentiate between CR as a *sufficient* and as a *necessary* condition for success (Walther & Schenkel, 2009).

It is often argued that CR not only furthers environmental and social goals, but leads to competitiveness at the same time (e.g. European Commission 2008a), thus constituting a *sufficient* condition for success. However, we see the need to be cautious with generalising this proposition. First, for methodological reasons, because the mostly quantitative studies suffer from a (non)response-bias, existing knowledge gaps of the respondents and socially accepted answers, the way social and financial performance are defined and measured differs significantly between studies and how these two factors are connected remains unclear (Walther & Schenkel, 2010).

Second, looking at the market share of sustainability-oriented products which often require a willingness to pay for a superior social and/or environmental performance (e.g. fair trade-products) is disillusioning. Most of the companies/products still serve sustainability-oriented niches of less than 1% of the total market. Established products (organic food, fair trade) account for 3-5% of the market. The high growth rates may be interpreted as dynamics but also highlight how small the sustainability niche markets still are. Aside from a small group of sustainability-

oriented consumers, companies with a superior CR-performance are not rewarded on the markets (e.g. Chatzidakis, Hibbert, & Smith, 2007). The same can be said about the biggest customer: the state (RNE, 2008).

What can be more safely argued, however, is that too little or no CR could lead to serious economic problems and could become a reason for failure, especially if CR reaches wider markets in the form of minimum standards. It is often expected (or better: hoped for) that the average consumer as well as trading firms, public procurement and larger companies towards their suppliers will increasingly consider social and ecological aspects. Among consumers the willingness to at least temporarily boycott companies/ products is much stronger. This can be explained with the greater effect of negative news because the default view on products/ companies still is that they are unproblematic (Folkes & Kamins, 1999; Mohr & Webb, 2005). However, scandals can never display the complexity of sustainability problems and usually mean no or little disadvantages for the participating consumers.

As companies at the moment (and for quite some time now) are doing more than is economically rewarded on the markets, waiting for or speculating on a change of societal values that can be felt economically through (mainly and most directly) the customers' behaviour, the market dynamics regarding CR are still fragile. Looking at the markets as a whole, sustainability at the moment does not seem to be a strong criterion for consumption decisions. The ensuing research questions now deal with the connection of market dynamics and the cultural embeddedness. Are the little observable CR-market dynamics a consequence of a beginning cultural change towards sustainability or a result of uncertainty about a change of values which is expected but has not occurred yet? And the other way around: Can these uncertainty-driven CR-market dynamics be regarded

as culture-influencing? Empirically we aim at understanding culture and the cultural influences on consumption decisions, furthering or impeding sustainability.

Consumer Studies and Research Questions

A multitude of international studies on all aspects of consumption decisions and behaviour as well as specifically German studies have been carried out so far (Loe, Ferrell, & Mansfield, 2000; Newholm & Shaw, 2007; O’Fallon & Butterfield, 2005). These deal with different sectors, different products and corresponding levels of sustainability relevance (e.g. de Pelsmacker, Driesen, & Rayp, 2005; Shaw, Grehan, Shiu, Hassan, & Thomson, 2005), single problems (e.g. sweatshop avoidance, Shaw et al., 2007), different types of consumers (such as the LOHAS, e.g. Ernst & Young, 2007), age differences (Birtwistle & Tsim, 2005; Carrigan, Szmigin, & Wright, 2004; Vermeir & Verbeke, 2006) und cultural differences (Belk, Devinney, & Eckhardt, 2005).

Consistent with the optimistic findings and conclusions regarding CR-market dynamics, these studies often report a high number of consumers (up to 80%) who state a sustainability-orientation and/or willingness to pay for ethical products (e.g. BMU, 2006; European Commission, 2008b). However, it is acknowledged, that there are significant discrepancies between consumers’ statements and behaviour. Larger studies confirm earlier sceptical views (e.g. Carrigan & Attalla, 2001), but still report 15-25% sustainability-oriented consumers measured by their behaviour (BMU, 2008; European Commission, 2008b; Kuckartz, Rheingans-Heintze, & Rädiker, 2007).

Accordingly, particular attention has been paid to explanations for this gap between stated personal values and attitudes of consumers and their behaviour. Two main arguments can be discerned. The majority of studies deal with the attitude-behaviour-gap, what Cowe and Williams

(2000) called the 30:3 syndrome, whereby “a third of consumers profess to care about companies’ policies and records on social responsibility, but ethical products rarely achieve more than 3% market share”. These studies aim at identifying the perceived barriers that impede consumers to act according to their sustainability values. Second, the sustainability-orientation itself as stated in the surveys is questioned (e.g. Boulstridge & Carrigan, 2000). We see four important research questions aiming at understanding consumption on different levels, which can be analysed against a cultural background:

1) Do the stated values and attitudes really exist?

In this case, there is no gap between values and behaviour. The primary explanation lies in the empirical problem of socially desired responses. Similar problems arise if sustainability values are deduced from statements on consumption decisions (e.g. Kuckartz et al., 2007). Not so much, when consumers are asked for the willingness to pay, using examples such as purchase of fair-trade products. But a lot of consumption decisions are superimposed by economic reasoning (e.g. energy efficiency), unquestioned cultural norms (e.g. waste separation in Germany) or perceptions of higher quality of these products. The complexity of social structures and individual perceptions makes it almost impossible to read off values from behaviour (Newholm, 2005).

2) Are existing sustainability values superimposed by other cultural patterns with more impact on attitudes?

The second research question also deals with values and attitudes and asks for sensemaking processes against a multitude of ambiguous and contradictory cultural patterns. We see evidence in the reported patterns of justification (d’Astous & Legendre, 2009). These are interpreted as

barriers for behaviour or ways to deal with guilt, but can also be seen as unconscious conflicts in the process of sensemaking and value construction exposed.

3) How can the attitude-behaviour-gap be explained against a cultural background?

The barriers to sustainable consumption are comprehensively surveyed (Newholm & Shaw, 2007). All of these are *perceived* barriers, but not all equally unconscious. Some of the often reported barriers can be found on a more conscious level, such as lack of information (on company activities, products and availability) or disorientation because of too much ambiguous, unclear and unsorted information.

Equally important criteria are (perceived) budget restrictions or price orientation in general, limited availability of alternatives (Nicholls & Lee, 2006), missing additional benefits that could justify a higher price (Meyer, 2001), brand orientation/ inertia and consumption routines, perceived options for action or the importance of the moral self-image which does not have to be that strongly linked to behaviour (Mazar & Zhong, 2009).

4) How big is the gap between perceived and actual sustainability-oriented behaviour?

In some cases, where an attitude-behaviour-gap is reported, consumers may in fact really try to put their values into practice. The gap is between what these consumers perceive to be the right behaviour and what (critical) observers regard as sustainability-orientation.

Theoretical Framework and Research Approach

People operate in a highly complex field of overlapping social systems, each with its own structures. These structures and individual actions are recursively connected (Giddens, 1984), with the actors not being consciously aware of the structures and not being able to fully plan all the consequences of actions. Using Giddens' framework, we can differentiate between the structural di-

mensions of (rules of) legitimation, (rules of) signification and allocative and authoritative resources, which are part of every structure. Here we focus on culture (signification structures) and individual perceptions which are connected to the construction of meaning, the development of personal values and attitudes.

Perceptions and the subsequent decisions are always subjective and – at best – intentionally rational. The human capability to consciously reflect on their own (and others') perceptions, decisions, actions and effects leads to rationalisation, ex ante as well as even more often ex post. Sensemaking usually is a retrospective process (Weick, 1995). As these reflections are again influenced by unconscious factors, they remain subjective.

The often unconscious foundations of perception/ sensemaking are so important, because of the many social systems people operate in. They are influenced by different, often contradictory, structures without being able to distinguish between them and to consciously switch roles and social systems. Subjective attitudes of the actors evolve interrelated to structures. Furthermore, individual actions possess the potential to change structures not only of the systems they refer to but also of other connected systems. From analysing perceptions and looking for patterns we can deduce cultural aspects. These are limited by our own perceptions and constructions of meaning.

Culture and subcultures unconsciously influence consumption decisions. It is not prices, quality, information, options for action etc. that exist objectively, but which have to make sense against deeper rooted beliefs and expectations on society, politics, economy and companies as well as the self-perception as a member of society and as a consumer. Every single consumption decision and action in turn potentially influences culture.

We conducted a two-part empirical study aiming at understanding the underlying cultural structures influencing consumption decisions. In light of the described research problems and the complexity of decision-making in social systems, this requires a qualitative approach (Newholm & Shaw, 2007). We carried out close to 200 interviews with consumers of all ages and social groups.

A T-shirt was used as the example for the first part of the interviews and as the starting point for the second part. While aiming at generalisable results on culture, we can also assess clothing consumption in particular, which despite some studies on hand (Birtwistle & Tsim, 2005; Bray, 2009; Dickson, 2001; Shaw, 2007) is still much less examined than food/fair trade. Sustainability so far plays a minor role for consumption decisions on clothing (BMU, 2008; Weller, 2008), while the relevance of CR, especially along the supply-chain is very high (DEFRA, 2007; Laudal, 2010). Also, compared to organic food or cosmetic products, clothing is less connected with perceived additional benefits such as better quality, taste, health etc. On the contrary, eco clothing, although sometimes associated with health, is often reported to be associated with a negative image: scratchy, ugly and unhip (Fischer & Pant, 2003). Furthermore, a growing discount orientation can be observed at the clothing consumer markets (Birtwistle & Moore, 2007; Hearson, 2006-2009). Last, but very important for our research questions: clothing is a good example for everyday buying decisions and as such heavily and unconsciously influenced by culture.

The first part of our study was more structured and dealt with the first two research questions pictured above. We surveyed the existence of sustainability-oriented values and attitudes towards consumption and tested the stability of these values. Our aim was to generate findings on the cultural embeddedness of sustainability and the relation to other (conflicting) deep-rooted beliefs. To reduce the problem of socially desired responses, we tried a different approach by turning the

research question upside down. Instead of asking the interviewees about their willingness to pay for sustainable products, we asked them for their willingness to “sell” sustainability values instead. Interviewees were asked for the price and characteristics of a T-shirt that they normally buy and that are important to them. Following this, they were asked if they would choose the same shirt, if it was 25% cheaper but at the same time it would be guaranteed that the production accounts for social and ecological problems. All those rejecting the offer with references to sustainability values were presented arguments to allay their concerns, trying to convince them into buying the cheaper product. If interviewees still refused to buy the cheaper shirt we asked them whether or not they would accept a 50% discount. The interviewees were asked to comment on their decisions on every step of the interview.

The second part consisted of qualitative problem-centred interviews on consumption decisions and the influencing factors, exploring and understanding the most important cultural patterns.

Findings

Part 1: Existence of and Willingness to Sell Sustainability Standards

With the first offer of a 25% discount we expected the same high numbers of respondents declining the offer as other studies report on the willingness to pay, maybe even higher. Here, the socially desired responses still were clear and the focus on negative effects should affect the respondents even more than positive effects of paying more for better products (Baumeister, Bratslavsky, Finkenauer, & Vohs, 2001). However, 50% of the interviewees immediately chose the cheaper product. This confirms studies reporting that consumers knowingly buy products from companies violating ethical standards but in return expect lower prices (Creyer & Ross, 1997).

The reasons given follow the two most reported justification patterns (e.g. d’Astous & Legendre, 2009): (1) price orientation is the way things are, it would be stupid not to always look for a cheaper product as long as the product features are the same. For this (large) part of the sample sustainability simply is no product feature. (2) The government ensures social and environmental standards. All of the respondents acknowledged the social and environmental problems connected with production and products. Their own consumption, however, had nothing to do with these, because if products are not forbidden they must be socially and environmentally correct. In the special case of clothing, additional references were made to fashion trends. The need to follow trends is an unquestioned part of culture for a lot of the interviewees (not only these 50%) and strongly connected to price orientation, as trend cycles are constantly shortening.

An additional 30% (or 60% of those who declined our first offer), could be (easily) convinced to choose the cheaper product. It became evident that beyond a general knowledge of social and environmental problems, the respondents had very little specific knowledge on single aspects as well as interrelations. The interviewees could not give reasons for their first decision and discuss our counter-arguments. Most of these 30% of respondents admitted to have made the socially “right” decision and that their behaviour in practice differs.

The remaining 20% of respondents who could not be convinced to sell their moral standards match the findings of other studies on the proportion of sustainability-oriented consumers. What became clear in our interviews is that $\frac{3}{4}$ of these also possess very little information and that their stated values are far from being deeply rooted in beliefs. In most cases, the only reason to reject our offer and stating they wanted to “do no harm” was child labour (see also Carrigan & Attalla, 2001). This was the decision-defining taboo. Other social and environmental problems did not influence the decisions. Here too, the interviewees could not give substantial reasons for their

decisions and did not see any connections between social problems (e.g. adults not being able to earn a living wage) and environmental pollution to the children's well-being (see also Auger, Burke, Devinney, & Louviere, 2003). The rejection of child labour is deeply rooted in cultural beliefs of these consumers but not connected to superordinate norms (such as sustainability).

Only 5% of our sample can be regarded as well-informed consumers with sustainability being an accepted general principle. These consumers form a societal subculture, where sustainability is a dominant cultural aspect. The proportion of this group corresponds more precisely with the observable market share of ethical or sustainability-oriented consumption.

To offer a 50% discount turned out to be unnecessary. On the one hand the respondents accepted the smaller discount, proving the non-existence or weakness of moral standards, on the other hand the taboo "child labour" or the sustainability orientation completely kept them from even thinking about choosing a product they knew to violate these values.

Part 2: Main Influences on Consumption Decisions

The reasons for consumption decisions can be explained on a much deeper level from the narratives in the second part of the interviews. With reference to the research questions, we can survey the more conscious factors impeding sustainability consumption behaviour as well as cultural patterns directly influencing attitudes and/or behaviour. The perception and behavioural patterns found in the open interviews follow 3 consumer groups from the first part: (1) The majority of about 80% of the respondents (again confirming that 30% first gave the socially desired responses), (2) 15% of consumers with at least a little sustainability consciousness and (3) the small group of at most 5% sustainability-oriented consumers. These groups are still heterogeneous. Here, we present the main cultural and behavioural patterns. More insights, considering differ-

ences of age groups, social milieus, gender etc., can be gained from the material on hand and will be presented soon.

On the level of observable and narrated activities and espoused justifications the factor knowledge/ information – as reported in almost every study – is the very important. The majority of questioned consumers not only had highly diffuse and fragmentary knowledge on social and environmental problems but on the corresponding aspects of products, let alone the companies and the production processes along the supply chain. Other aspects emerging in most of the interviews were quality perception, options for action, budget restrictions and the assessment of the social and environmental impacts of one's own consumption.

The majority of consumers uninterested in sustainability or with sustainability values superimposed by conflicting and stronger cultural aspects consistently do not actively seek information. In some interviews it was stated, that when product attributes are completely identical, there would be an orientation on labels. In the case of clothing, however, this remains an always hypothetical situation, as next to price and quality, design and brand play such an important role, that different pieces of clothing are never perceived as fully equal. Additionally, these consumers know nothing about the labels they claim they would use for guidance. Whenever this consumer group refers to confusing information, this is not based on own experiences with the search for information but purely as a justification for not even trying (and wanting). The same use as justification can be observed regarding the perceived (missing) options for action.

After having decided on what to buy, based on fashion and/or brand, it is all about getting it as cheap as possible. Interestingly, sustainability oriented products were perceived as of higher quality by almost all interviewees, regardless of their actual consumption behaviour, but in the case of the majority of consumers without being able to argue why. Price on the other hand is

perceived as a conflicting criterion, again without further knowledge how much or even if sustainable products are more expensive. Fashion also is often seen as an opposite to sustainability.

For most of these respondents budget restrictions just mean, that sustainability reduces the quantity of consumption. However, for some interviewees these restrictions are much more real. Although sustainable clothing does not have to be expensive, the cheapest and – for some consumers inevitable – alternative still is the socially and environmentally problematic one. But even though price and sustainability are perceived as conflicting and most respondent admitted that they could do more (if they wanted to), generally the own consumption is regarded as largely sustainable. “If it wouldn’t be ok, it wouldn’t be in the shops”, “We have all these environmental and social laws”.

The second group of 15% of respondents, unwilling to choose the cheaper unsustainable product, state the same information problems. Consumers not only need information on product attributes and production processes, which are provided by the companies themselves as well as governmental and non-governmental actors, but also the necessary knowledge to assess this information, first against the background of sustainability and second against their own values. It is acknowledged that the necessary information could be obtained, but search costs, especially expenditure of time, constitute an important barrier. Even more so, as search costs are not calculable beforehand and search results will never be complete and consistent.

Nevertheless, this group feels more informed, even if information just means to know how complicated the subject is. The stated sustainability-consciousness is still hindered by lack of information and does not guide consumption behaviour. Not even the strong taboo child labour systematically is a criterion for buying decisions. These consumers react to scandals and temporarily penalise products or companies. They also find orientation in well-established labels and in some

cases brands, although often the big brands in particular are perceived as the most sustainable. This sometimes contradicts their statements, that smaller companies are better than large ones. An active search for the products/companies that fit their own values and a willingness to reward them on the markets is not observable.

These consumers want easily digestible information provided by societal actors they trust. What is requested are guaranteed minimum standards. The government is not perceived to already be ensuring social and environmental standards but still to be main actor who should do so. Information on rewardable products and companies are seldom asked for. Just like the majority, these consumers see no impact of their own consumption-decision on societal problems. Only few are (unsubstantiated) convinced of the sustainability of their consumption.

Budget restrictions here too are given as a reason for not acting according to their stated attitudes towards sustainability. Again, price is a dominant factor, but most important, fashion is seen as incompatible with sustainability and the need to follow fashion trends is unquestioned. Together these factors work as a huge barrier for sustainable consumption. To follow fast-changing trends puts pressure on the budget and leads to price orientation. The lack of information not only on problems, product attributes and corporate sustainability, but especially on producers and retailers offering fashion- *and* sustainability-conscious products, makes it difficult to leave this path.

The small group of sustainability-oriented consumers on the contrary is characterised by a high level of information and a willingness to pay for sustainability. Two subgroups can be distinguished: On the one hand the sustainability-driven political consumers: This subgroup is the best informed one and (rightly) convinced of the socially and environmentally correctness of its consumption. The price is a far less important criterion, even though they possess the same budget restriction than other consumers. While sustainability products are perceived as of higher quality,

the main reason for their consumption orientation is political („to make the world better“) and they perceived the duty to act (and not only refer to the government). Accordingly these consumers see the potential to exert influence via consumption. The second subgroup mainly consists of consumers who fit the (critical) description of the LOHAS. This subgroup states no or little budget restrictions. Next to ethical considerations, additional drivers for sustainability oriented consumption decisions are perceived quality and – most important – distinguishment from the masses.

Cultural Patterns

Three main cultural patterns could be identified from the narratives on actual consumption. These dominate consumption decisions on different levels, partly by superimposing sustainability values and attitudes, partly by impeding an attitude-compliant behaviour. The cultural patterns follow the justifications given in the first part of the interviews:

1) Discount culture

This can be observed almost all over the world, but is an important topic especially in richer countries where alternative behaviour is possible. Discount culture in Germany, compared to other European countries, is widely regarded to be of above-average relevance. Influences on consumption can be seen at the level of attitudes (“Price-orientation is just the way it is”) as well as behaviour (“I want to consume better, but in the end I look at the price”).

2) Sustainability as the government’s duty

This cultural pattern is also much stronger in Germany than in most other European countries. The perceived individual responsibility is relatively weak and consumer’s own influence widely negated. In some cases the latter clearly is just an excuse, but generally it is rooted in beliefs. We

observe a strong (negative) influence on the transformation of sustainability values (if there are any) into attitudes towards consumption. “I’m all for sustainability, it should be obligatory for every company and with it for every consumer.” “I want sustainability, but I don’t want to think about it when I’m shopping.” Regarding the attitude-behaviour-gap this cultural pattern offers no further explanation on the divergence of talk and action. However, information problems are seldom reported without reference to the government.

3) Fashion culture:

In the case of clothing, the unquestioned need to follow fashion trends is the strongest cultural pattern. As deeply as this is embedded in beliefs, it does not influence attitudes towards sustainability but sets the background for consumption decisions. On the level of values and attitudes, fashion and sustainability are not perceived as contradictions. Only on the behavioural level fashion becomes a strong barrier to sustainable consumption. In combination with the lack of information about the products on offer, fashion culture can be identified as the main explanation for the attitude-behaviour-gap in clothing consumption.

Conclusion

Germany still is more sustainability-oriented than most first-world countries, be it because of stronger laws (fitting to culture), ethical considerations of companies or companies expecting stakeholders to increasingly consider sustainability. Our findings, however, relativise the often reported sustainability orientation of consumers and show that the cultural embeddedness of sustainability is still missing. The little knowledge consumers have, not only on products, companies and options for action, but more important on the social and environmental problems connected with the concept of sustainability can be regarded as a reason as well as evidence for

the missing roots in culture. The question, if the little market dynamics point to the beginning of cultural change or mainly uncertainty on the side of companies remains open. At the moment, regarding the consumers, the sustainability niche is still clearly separated from the mass market. What the interviews clearly showed, is that the established cultural patterns as well as the still existing information problems form huge barriers for sustainable consumption, which have to be overcome.

To further sustainability through CR-market dynamics, the majority of consumers have to learn and to accept the concept of sustainability first. The scope of action in which sustainability just needs information and no willingness to make sacrifices is very limited. Sustainability comes with costs and has to be paid for. Information, (financial) incentives, legal norms and – last but not least – the products on offer need to be discussed as means to influence the cultural embeddedness of sustainability, not only to overcome the gap to behaviour. The attitude-behaviour-gap is more important regarding the second described consumer segment. Here, information from social and environmental problems to availability of products is central for closing this gap.

As every societal actor in principle has an impact on culture, it has to be asked by whom and how culture can be lead towards sustainability. Companies have little to gain and already walk ahead, waiting for market actors to follow. However, opportunities of companies to further cultural change towards sustainability in order to create markets, where their CR sells, need to be analysed closer. NGOs and consumer organizations try, but do not reach the majority of consumers. With regard to the established cultural patterns, the government is at the centre of attention. The state is a main culture-influencing actor and the only one that we can demand from to actively promote such cultural change. Even though the CR-debate focuses on voluntariness, against the backdrop of sustainability, it does not seem sufficient for the government to just talk about sus-

tainability and wait for market dynamic to happen. It is time to match words with actions in public procurement and even to take legal regulations into greater consideration (again).

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