Strategic Workshop

Foresight on Future Demand for Forest-based Products and Services: Final Conference

12-13 September 2011 – Sekocin Stary, Poland

Back-to-back Workshop on "Foresight for the forest strategies"

12 September 2011 – Sekocin Stary, Poland

The forest sector is in a challenging phase: there are high, sometimes even conflicting demands on forests, and their products and services. Forest and forestry strategies direct our actions towards the future, and define what kind of goals and priorities we set for our forests in a certain time horizon. There have been different approaches developed across Europe for defining the forest and forestry strategies e.g. at national and regional level, or for a purpose of a single organisation. These strategies consider the challenges foreseeable, but also a number of uncertainties affecting forests and the forest-based sector developments. Prioritising and decision making needs to take into account, for example, the climate change impacts, pressure on land use, conservation needs, industry demands for raw material, energy targets for renewables and the recreation needs of citizens – and the further to the future horizon we target, the more uncertainties there are. This requires more flexibility from the decision making processes and structures.

Although we cannot predict the future, we can investigate different development pathways in a structured manner and improve our ability to respond in different situations where the future might evolve. Foresight is a method for this aim: Foresight is a systematic, participatory, future intelligence gathering and medium-to-long-term vision-building process aimed at present day decisions and mobilizing joint actions.

The COST strategic workshop series (2010-2011) shared knowledge about foresight exercises carried out in the forest sector and related sectors. Examples of using foresight in forest-related strategy and decision making processes can be found e.g. from Finland, Sweden, Germany and France. The 1-day workshop will introduce concrete examples how foresight has been used in forest related strategy processes in Europe. The session will allow learning about the foresight approach, methods and tools, and to share ideas with the experts in different countries.

The programme will consist of four key notes and an interactive session to share experiences and lessons learned. Workshop will be held in English with max. 35 participants representing key stakeholders in strategy process in Poland (on invitation only). Contact and responsible organiser in Poland is the Forest Research Institute IBLES, Tomasz Zawila-Niedzwiecki [T.Zawila-Niedzwiecki@ibles.waw.pl].

The workshop is arranged back to back with the final conference of the COST strategic workshop series, September 13. The strategic workshop series in 2010-2011 has been a collaborative effort between the European Forest Institute (EFI) and the COST Domain Committee for Forests, their Products and Services. For further information about the conference, see http://www.cost.esf.org/events/Forestry-Foresight-Dissemination-Conference

Programme:

(8.30 transportation from Warsaw / hotels)

9.30-10 Introduction and goals. Opening by the host (Ministry of Environment) and EFI.

10-12 Key notes (á 30 min, incl. time for questions – one coffee break): **Foresight in forest(ry) strategies**

This session will provide concrete examples how foresight has been used in forest, forestry and forest sector strategies, what are the objectives and what kind of results have been achieved. Presentation of the EU forestry strategy and EU Forest Action Plan will provide a wider European framework for the session.

- Foresight in support of National Forest Programme in Finland, Director Ms. Marja Kokkonen, Ministry of Agriculture and Forestry in Finland
- Future Forests Programme in Sweden, Prof. Jon Moen, University of Umeå
- Forest Futures 2100. Experiences with a foresight process in Germany, Prof. Dr. Ulrich Schraml, Institut für Forst- und Umweltpolitik, University of Freiburg
- New EU forestry strategy: State of the play, Ms. Maria Gafo Gómez-Zamalloa, European Commission, Directorate General for Agriculture and Rural Development, Unit "Bioenergy, Climate Change and Forests"

12-13 Lunch

13-16 Key note and interactive session (incl. coffee break): **Innovative methods and participatory approaches for future intelligence**

This session will introduce foresight methods which can be used in the forest strategy process. An interactive session (work in small groups) allows testing methods in practice.

The session will be prepared and facilitated by Prof. Jon Moen (Future Forests programme) and Ms. Päivi Pelli (EFI).

16-17 Plenary about the session results, conclusions and closing of the workshop.

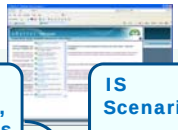
(transportation to Warsaw / hotels)

Foresight for forest strategies – introduction and goals

September 12, 2011
Sekocin Stary, Poland

Back-to-back Workshop of the COST Strategic Workshop "Foresight on Future Demand for Forest-based Products and Services" – Final Conference

The COST Strategic Workshop (WS) series:
Foresight on Future Demand for Forest-based Products and Services



Vienna
September 7-8

Barcelona

A part of the Poland Presidency of the EU council agenda

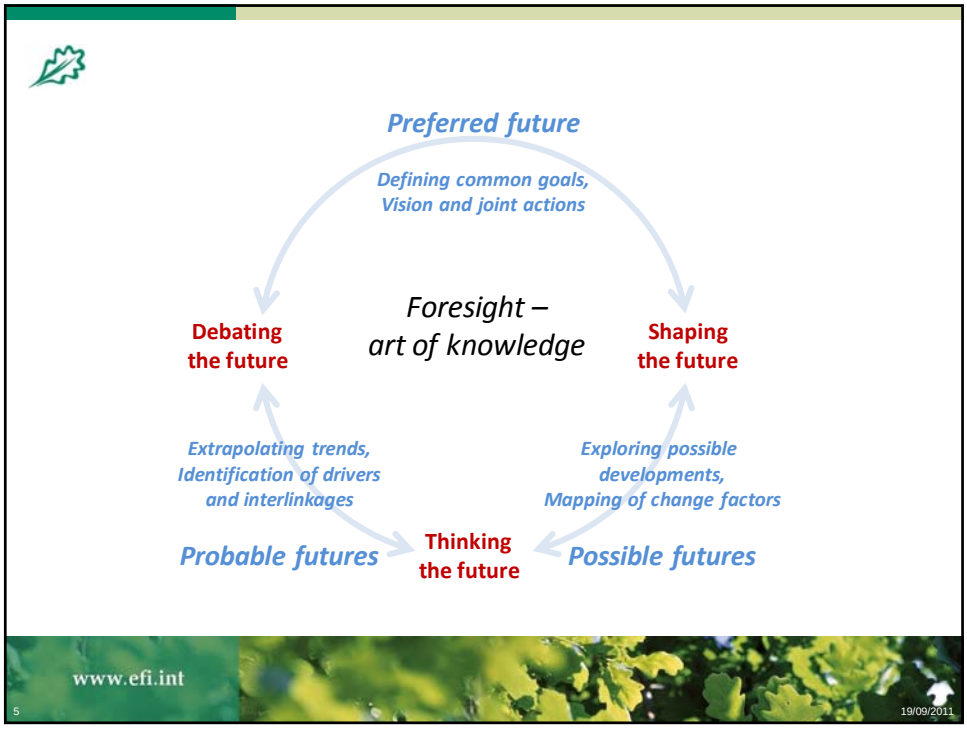
Purpose and goals of the COST sws exercise

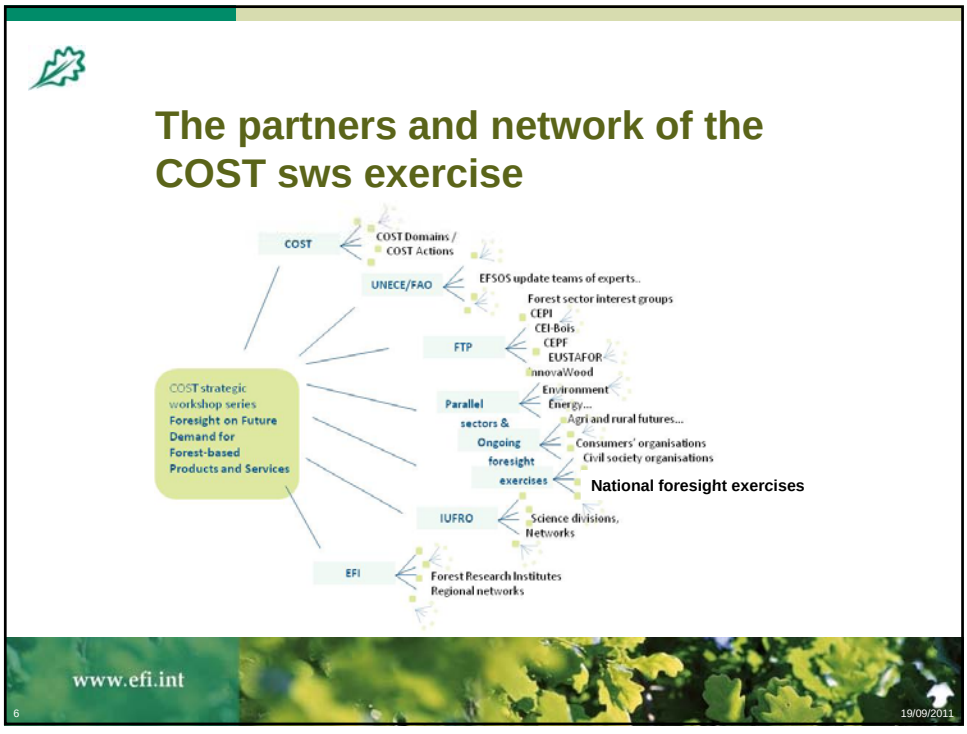
1. to provide **futures information** about the needs and demand for forest-based products and services, and the drivers behind these developments;

2. to **build capacities** in foresight methods and tools, and to **connect the ongoing futures-oriented activities** both in the forest sector and parallel sectors.

Foresight – the definition

Foresight is a systematic, participatory, future intelligence gathering and medium-to-long-term vision-building process aimed at present day decisions and mobilizing joint actions.


Preferred future
Defining common goals,
Vision and joint actions
Foresight –
art of knowledge
Debating
the future
Shaping
the future
Extrapolating trends,
Identification of drivers
and interlinkages
Exploring possible
developments,
Mapping of change factors
Probable futures
Thinking
the future
Possible futures
www.efi.int
5
19/09/2011


The partners and network of the
COST sws exercise
COST strategic
workshop series
Foresight on Future
Demand for
Forest-based
Products and Services
COST
COST Domains /
COST Actions
UNECE/FAO
EFSOS update teams of experts..
Forest sector interest groups
CEPI
CEI-Bois
CEPF
EUSTAFOR
InnovaWood
FTP
Parallel
sectors &
Ongoing
foresight
exercises
Environment
Energy...
Agri and rural futures...
Consumers' organisations
Civil society organisations
National foresight exercises
IUFRO
Science divisions,
Networks
EFI
Forest Research Institutes
Regional networks
www.efi.int
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19/09/2011

Purpose and goals of the workshop on foresight and forest strategies

- to share expertise and practices on foresight in forest, forestry and forest sector strategies – including a viewpoint to developments in a wider EU framework
- introduce foresight methods and test an interactive session in practice

Welcome:

Wishing you a fruitful workshop day!

Key notes: Foresight in forest(ry) strategies

- ***Foresight in support of National Forest Programme in Finland***, Director Ms. Marja Kokkonen, Ministry of Agriculture and Forestry in Finland
- ***Future Forests Programme in Sweden***, Prof. Jon Moen, University of Umeå
- ***Forest Futures 2100. Experiences with a foresight process in Germany***, Prof. Dr. Ulrich Schraml, Institut für Forst- und Umweltpolitik, University of Freiburg
- ***New EU forestry strategy: State of the play***, Ms. Maria Gafo Gómez-Zamalloa, European Commission, Directorate General for Agriculture and Rural Development, Unit "Bioenergy, Climate Change and Forests"

Foresight in support of National Forest Proramme in Finland

Marja Kokkonen
Director of Unit
Ministry of Agriculture and Forestry, Finland

Warsow12 September 2011

Contents of the presentation

1. Background
2. Finland's National Forest Programme (NFP)
3. Examples of foresight in the NFP process
4. What have we learned?

FORESTS ARE IMPORTANT FOR FINLAND

ECONOMIC ASPECTS

- 22 mill. ha of forests
- Harvesting 55 mill.m^3/y
- Stumpage earnings 2 billion €/y (30 €/m^3)
- Average net income 100 €/ha/y
- 20 % of exports from forest products

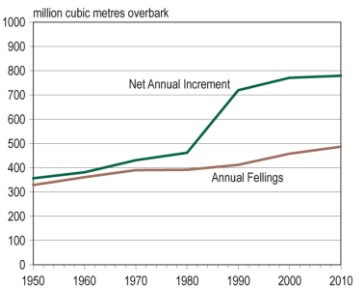
SOCIAL ASPECTS

- Forest sector employment 75 000
- Multiple use, public right of access

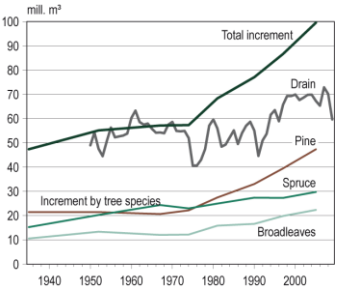
ECOLOGICAL ASPECTS

- 73% of land area covered by forests
- Endangered species: 37% in forests
- Forests as a net sink:
  20 - 40 million tn CO_2-eqv

SUSTAINABILITY - UNDERUTILIZED RESOURCE BASE

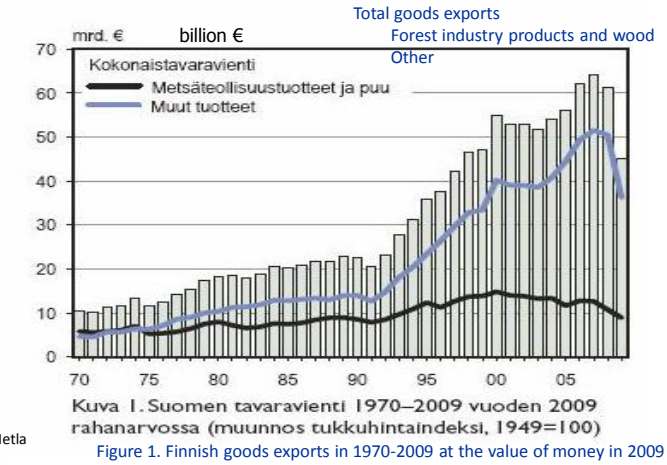


Net annual increment of growing stock and annual fellings in Europe(1950–2010).
Sources: Kuusela (1994). Forest Resources in Europe 1950–1990;
State of Europe's Forest 2011.



Annual increment of growing stock (1935–2009) and annual drain in Finland (1950–2009).
Source: Finnish Forest Research Institute

The value of Finnish wood industry exports has not risen in line with the total goods exports

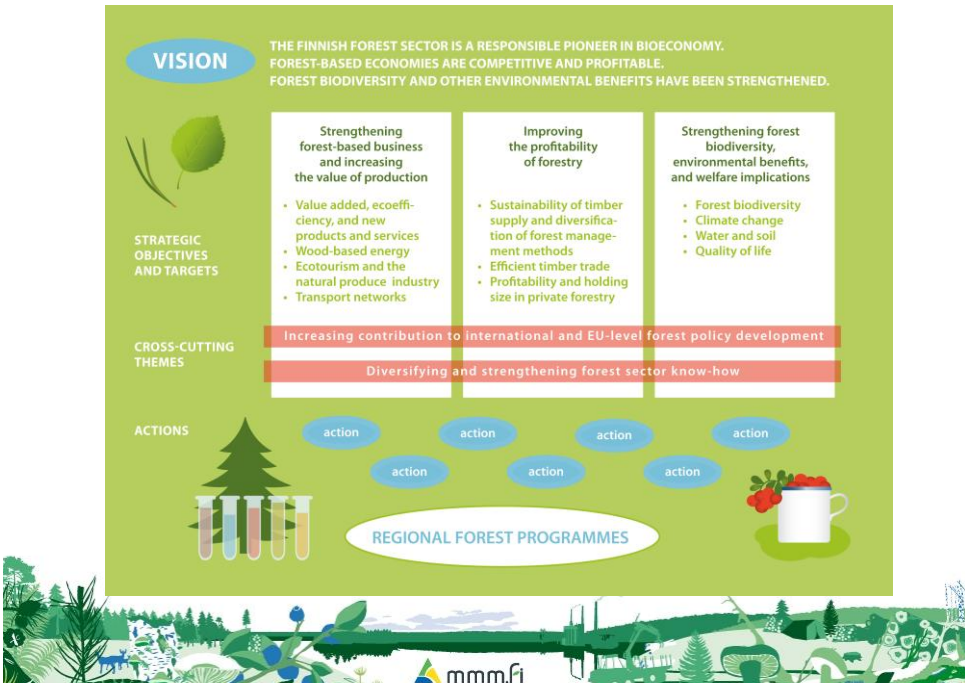


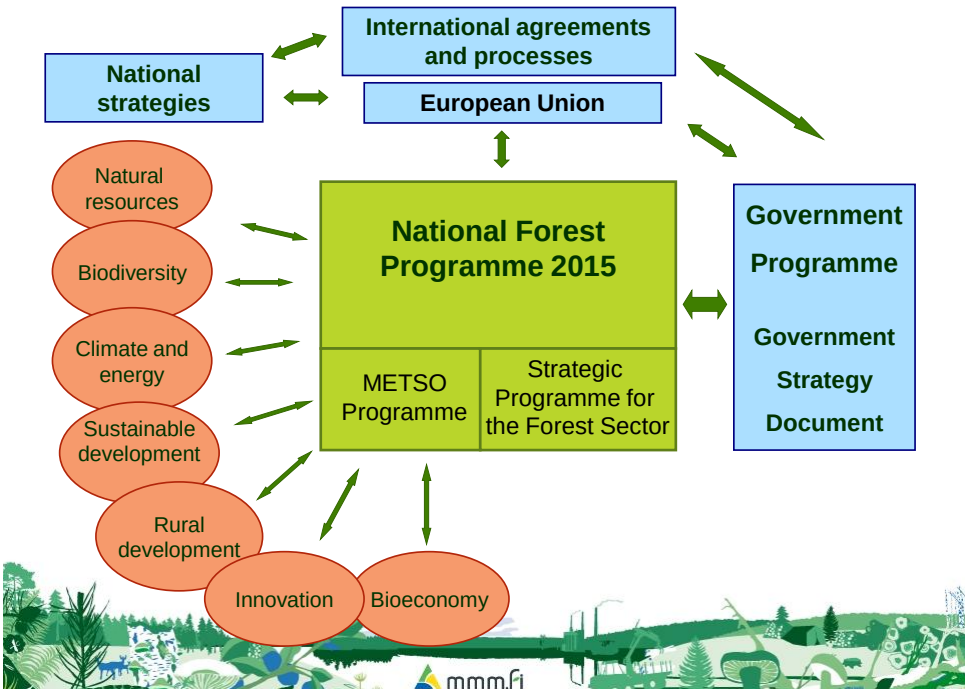
Total goods exports
Forest industry products and wood
Other

SOURCE: Metla

Figure 1. Finnish goods exports in 1970-2009 at the value of money in 2009 (conversion into wholesale price index, 1949=100)

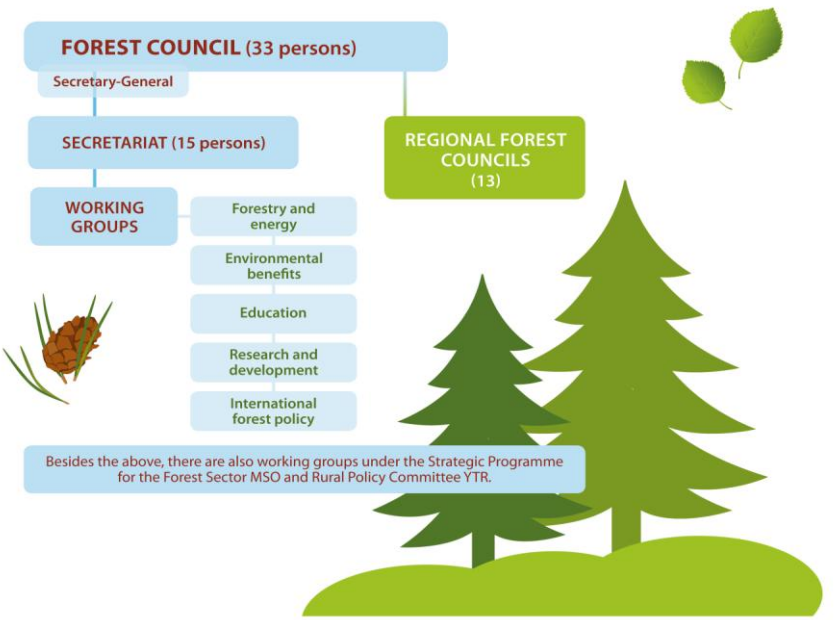
Finland's National Forest Programme (NFP)


VISION
THE FINNISH FOREST SECTOR IS A RESPONSIBLE PIONEER IN BIOECONOMY.
FOREST-BASED ECONOMIES ARE COMPETITIVE AND PROFITABLE.
FOREST BIODIVERSITY AND OTHER ENVIRONMENTAL BENEFITS HAVE BEEN STRENGTHENED.
STRATEGIC OBJECTIVES AND TARGETS
Strengthening forest-based business and increasing the value of production
• Value added, ecoeffi-ciency, and new products and services
• Wood-based energy
• Ecotourism and the natural produce industry
• Transport networks
Improving the profitability of forestry
• Sustainability of timber supply and diversifica-tion of forest manage-ment methods
• Efficient timber trade
• Profitability and holding size in private forestry
Strengthening forest biodiversity, environmental benefits, and welfare implications
• Forest biodiversity
• Climate change
• Water and soil
• Quality of life
CROSS-CUTTING THEMES
Increasing contribution to international and EU-level forest policy development
Diversifying and strengthening forest sector know-how
ACTIONS
action
action
action
action
action
action
action
REGIONAL FOREST PROGRAMMES
mmm.fi

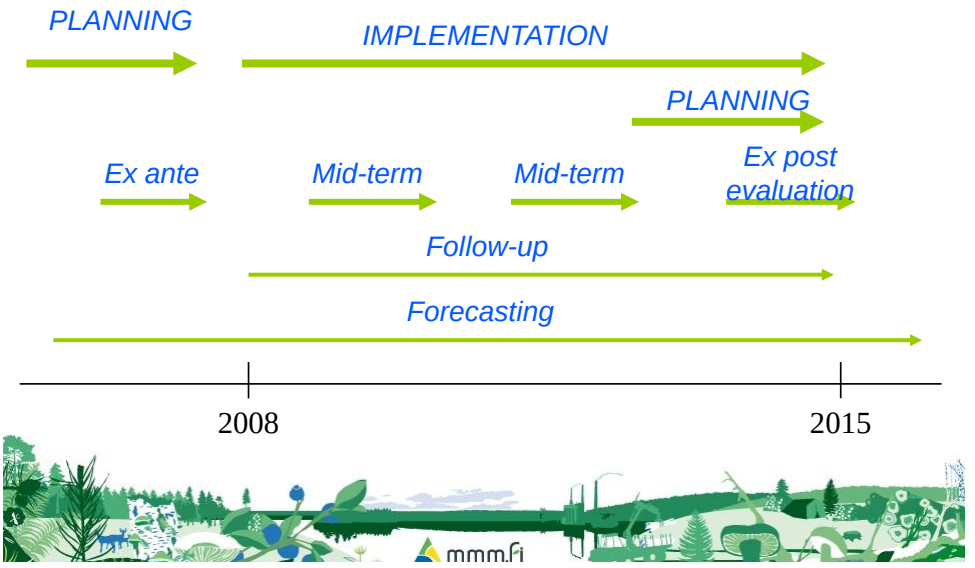

International agreements and processes
National strategies
European Union
Natural resources
Biodiversity
Climate and energy
Sustainable development
Rural development
National Forest Programme 2015
METSO Programme
Strategic Programme for the Forest Sector
Government Programme
Government Strategy Document
Innovation
Bioeconomy
mmm.fi

How is it implemented?

- As a regular part of work in public administration
  - legislation, budgeting, incentives, performance guidance, strategic planning, advising, research, media, etc.
- Cross-sectoral programmes and strategies
- National and regional projects
- Private sector activities
- Financing from different ministries and private sector



Stages in the programme cycle



Examples of foresight in the NFP process

Examples (1)

- **Finnish Forest Research Institute Metla: Welfare based on Finnish forests 2015 -** Survey of trends and future options of the Finnish forest sector
  - ✓ Survey commissioned by the Ministry in 2006
  - ✓ Changes in the operating environment of the forest sector and the measures needed to address them
  - ✓ Two future scenarios (BAU and reform) and three surprise scenarios (Use of imported wood cut by half, Collapse in public support for the forest sector, Surprising developments in climate change)
  - ✓ 70 researchers of Metla involved + broad expert and background groups

Examples (1)

- **Metla: Welfare based on Finnish forests 2015**

Messages:

- ✓ The role of Finland and forests in globalisation rests in competence and know-how, innovation and developing something new.
- ✓ Excellent opportunities in the forest sector to contribute to producing more material and immaterial welfare with less burden on the environment.
- ✓ Abundant, viable and diverse forest resources a preconditions for growth in forest-based welfare.

Need for reform in the forest sector > Future Review, i.e. draft NFP, approved by the Forest Council

Examples (2)

- **Metla: Alternative calculations for the preparation of NFP 2015**

✓ Specification of the objectives presented in Future Review of 2006 for the final NFP

✓ Five scenarios (Current state continues, Decrease in wood imports, Decrease in wood imports + additional protection, Bioenergy and new products, Maximum sustainable felling)

✓ In each scenario background assumptions for energy price, wood imports, use of forest chips, forest protection and prices of forest industry products in 2015)

Examples (2)

- **Metla: Alternative calculations for the preparation of NFP 2015**

✓ Quantitative calculations for 2015 from each scenario

✓ Fellings, roundwood prices, forest industry production, gross stumpage earnings of forestry (SF-GTM model)

✓ Value added, multiplier impacts and tax revenue, employment (input-output model)

✓ Increment and output of forests at selected volumes in tending of seedling stands and ditching (MELA model and estimates)

Examples (2)

- **Metla: Alternative calculations for the preparation of NFP 2015**
  - ✓ Quantitative calculations for 2015 from each scenario (cont.)
    - ✓ Preservation of biodiversity, level of water protection, opportunities for multiple use of forests, social acceptability, impacts of bioenergy, impacts of climate change (estimates by experts)
  - ✓ A scenario for recreational use of forests produced on the basis of qualitative estimates
    - ✓ No calculation models for this

Examples (2)

- **Metla: Alternative calculations for the preparation of NFP 2015**
  - ✓ Forest Council, Secretariat and working groups held a workshop to assess in the light of the calculations whether and how the objectives of the Future Review should be revised
    - > The only change was the reduction in the area treatec with fertilisation for growth from 100 000 ha to 50 000 ha
    - > NFP 2015 approved by the Government in March 2008

Examples (2)

- **Metla: Alternative calculations for the preparation of NFP 2015**

> NFP 2015 vision or target state for 2015

Finland is a world pioneer in sustainable forest management, the competence of the sector has been refined into new competitive products and services, the use of domestic wood has increased significantly and forest biodiversity has improved.

Examples (3)

- University of Joensuu/Forest Sector Foresight Unit:
  Impact of economic crisis and changes in the forest sector on the implementation of NFP 2015
  - ✓ Based on the need to revise the NFP 2015 adopted in 2008 due to rapid changes in the operating environment
  - ✓ General economic scenarios of the Finnish Innovation Fund SITRA were utilised ("The west sheds its skin", "Chinese capitalism", "Battle of the blocs" and "Stimulus and collapsus")
  - ✓ Review of which of the priorities, objectives and measures of the NFP 2015 should be changed in each scenario

  > Helped in creating the new "Bioeconomy NFP 2015"

Examples (4)

- **Workshops on various topics with different methods**
  - ✓ Inspiring and interesting keynote speakers
  - ✓ Diverse and non-traditional composition
  - ✓ Workshop topics
    - ✓ Education and training in the forest sector
    - ✓ Future workshops in 2010 (with wheel and table of the future and soft system methodology as tools); views of the future and identification of challenges and opportunities in the sector as an outcome > 6 main themes to be dealt with in further workshops

Examples (4)

- **Workshops on various topics with different methods**
  - ✓ Further workshops in 2010 on:

    Target-oriented forest ownership, Welfare forest, Forests as energy, Service exports, New technologies, Paper and cardboard and Wood product sectors

    > Drafts for research and development projects to be financed

    > Ideas for participants' own work

Examples (5)

- The Future Forum on Forests of Finland 2002-2008*/* University of Joensuu
  - ✓ Established by Ministry's funding in 2002
  - ✓ Multisectoral and multidisciplinary work aimed to provide information on issues affecting forest-based livelihoods in the future (10 to 20-year perspective). The multidisciplinary approach was fundamental for finding innovative ideas.
  - ✓ By exploring the developments affecting livelihoods in the forest sector, the Forum aimed to:
  - – Support the development of national forest policy and other policies relevant to the forest sector, and
  - – Offer new stimuli, material and tools for the strategy work in different forest sector organisations.

Examples (5)

- The Future Forum on Forests of Finland 2002-2008
  - ✓ **Four pillars of activities**
    - ✓ Foresight network composed of Finnish experts from different disciplines
    - ✓ Group of detached studies (scenario techniques, delphi-analysis, analysis of weak signals, trend extrapolation, expert opinions and systems analysis)
    - ✓ Series of seminars
    - ✓ Internet service

Examples (5)

- Forest Sector Foresight Unit 2008-2011, University of Joensuu
  - ✓ Continued the work of the Future Forum on Forests
    - ✓ Focus on communicating information on the future to forest sector actors with future seminars and collaboration among stakeholders as the main forms of work
    - ✓ Promoting the creation of new business activities based on forests and use of wood in North Karelia and supporting the renewal of the existing businesses
    - ✓ Provision of expert services
    - > The Unit closed down when the project funding ended

Example (6)

- **Forest Sector Foresight Network**
  - ✓ Network of parties involved in foresight work in the forest sector, coordinated by the Ministry of Agriculture and Forestry and Ministry of Employment and the Economy
    - ✓ The core composed of the Finnish Forest Research Institute Metla, University of Eastern Finland and European Forest Institute EFI
    - ✓ Other parties involved include strategic centres of top expertise, centres of excellence, universities, research institutes and users of information
    - ✓ Organises workshops, produces and disseminates information

Examples (7)

- **Foresight as part of regular activities at the Finnish Forest Research Institute Metla**
  - ✓ Reports on long-term development in the whole forest sector since 1980
  - ✓ Annual short-term business and market forecasts since 1991
  - ✓ Monitoring forest resources (NFI) and calculations for potential and sustainable removals (MELA model)
  - ✓ Roadmaps, feasibility studies and strategic analysis
  - ✓ Maintenance and development of forward-looking tools and processes (FinFEP, SF-GTM, etc.)

What have we learned?

- Recognizing the significance and role of foresight
- Foresight calls for unprejudiced and hard-headed approach, because the messages are not always welcome and easy to accept
- Different stages of NFP process call for different kinds of foresight
- Various methods, suited for different purposes (foresight experts help in considering and selecting these)
- Short, medium and long term to be taken into account

What have we learned?

- Processes and structures must be created for the production and dissemination of foresight information
  - ✓ Cross-sectoral approach (sectors and disciplines)
  - ✓ Part of the activities of institutes in a coordinated manner
  - ✓ Where necessary, a special unit set up
  - ✓ Cooperation network and coordination among parties involved in foresight work with support from the relevant ministries as the basic model
  - ✓ Serves the public sector, companies, NGOs and other actors

What have we learned?

- Foresight
  - ✓ supports decision-making
  - ✓ enhances understanding of the operating environment and needs for change
  - ✓ brings forth various alternatives
  - ✓ is a tool for preparing for uncertainty and surprises.

Foresight helps to create the future

Thank you!

www.mmm.fi/nfp

Future Forests

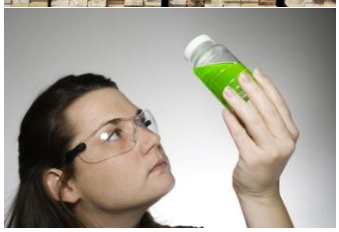
Sustainable Strategies under
Uncertainty and Risk

hunting

Future Forests

Sustainable strategies under uncertainty and risk

The demands on forests and forestry is increasing




New pressures, new products:
Logging residues as a resource for bioenergy


Stump harvest


Forest fertilization with nitrogen


Use of exotic tree species (like Pinus contorta)

Use of genetically modified trees

Future Forests
Sustainable strategies under uncertainty and risk

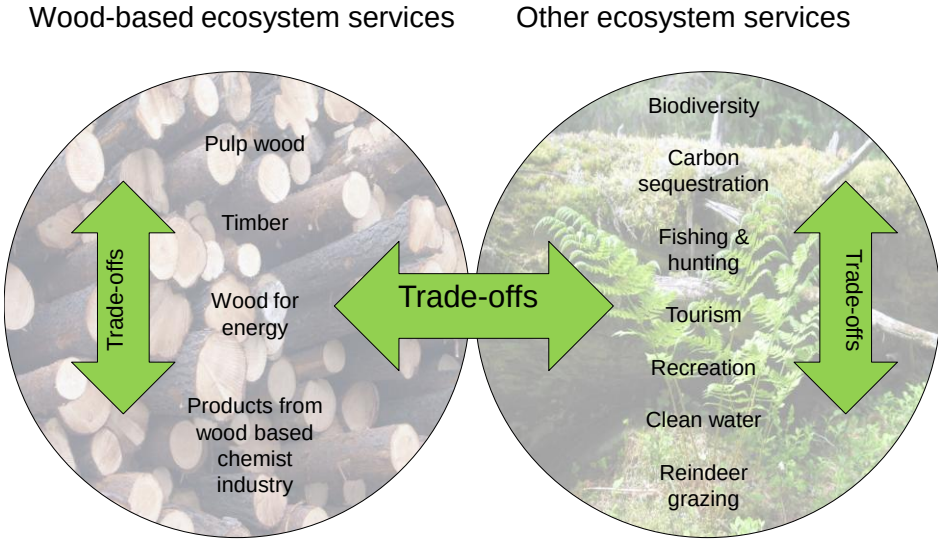
International policies directing trade-offs in forest management on the national level:

International
- Convention on Biological Diversity
- Framework Convention on Climate Change (Kyoto protocol)

EU
- Habitat Directive
- Renewable Energy Directive (20-20-20 targets)
- Water Framework Directive (and Baltic Sea Action Plan)

Future Forests

Sustainable strategies under uncertainty and risk



The Future Forests program

✓ interdisciplinary science to support policy processes

✓ scientist - stakeholder collaboration platform

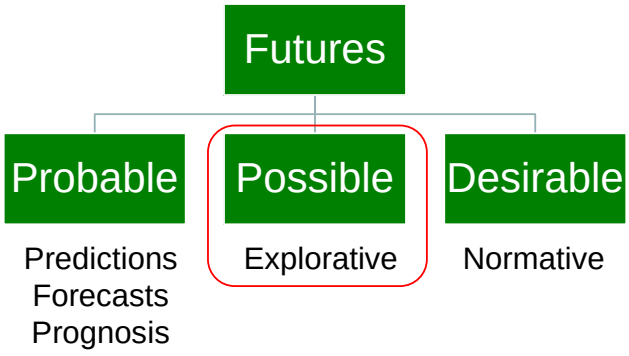
✓2009-2012 (2013-2016)

Some examples of Future Forests research

- Mitigation and adaptation to climate change: carbon sequestration or substitution, bioenergy markets, carbon accounting, public perceptions, media analyses
- Water and soils management
- Conflict studies in natural resource management: moose hunting vs browsing damages, biological diversity in production forests
- A theoretical framework for analysing changes in forest management
- Futures studies

Future Forests
Sustainable strategies under uncertainty and risk

Futures scenarios



Possible futures

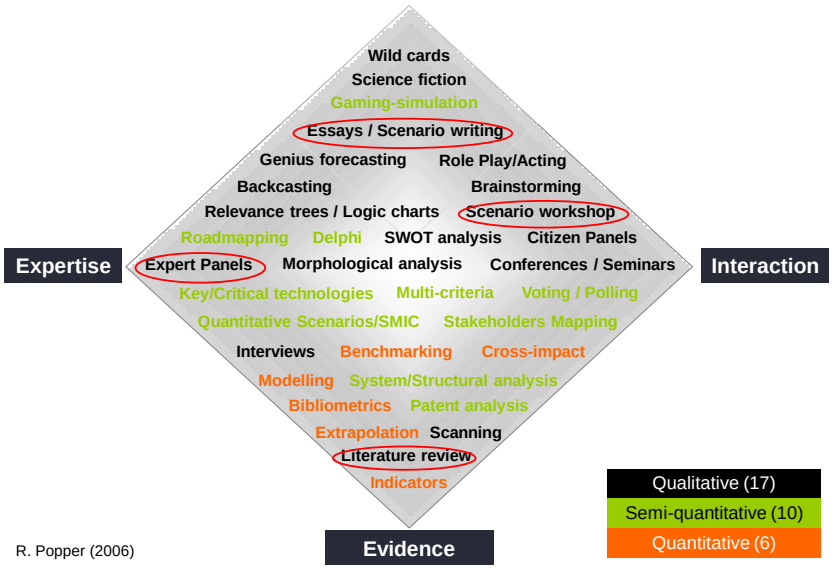
- Logical descriptions (narratives) of what MIGHT happen
- No probabilities attached to the scenarios
- Analyses of consequences
- No set of scenarios are the 'right' ones. They can only be more or less interesting. The values lie in the discussions around the scenarios.

Future Forests
Sustainable strategies under uncertainty and risk

Aim of our scenario-analyses

- Begin a dialogue within the program and with our stakeholders on complex forest issues

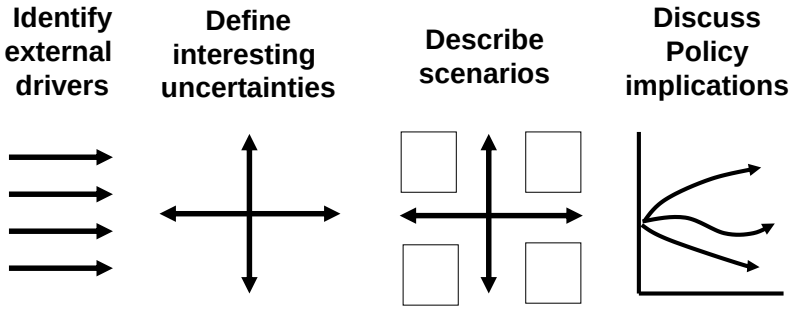
Combination of methods



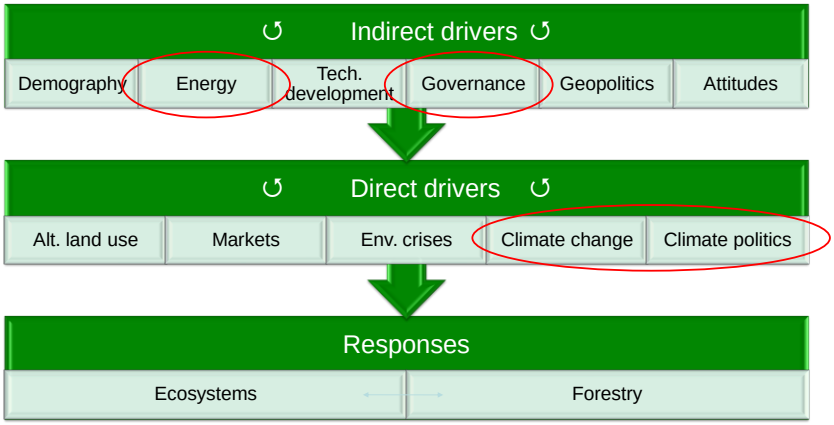
R. Popper (2006)

Future Forests
Sustainable strategies under uncertainty and risk

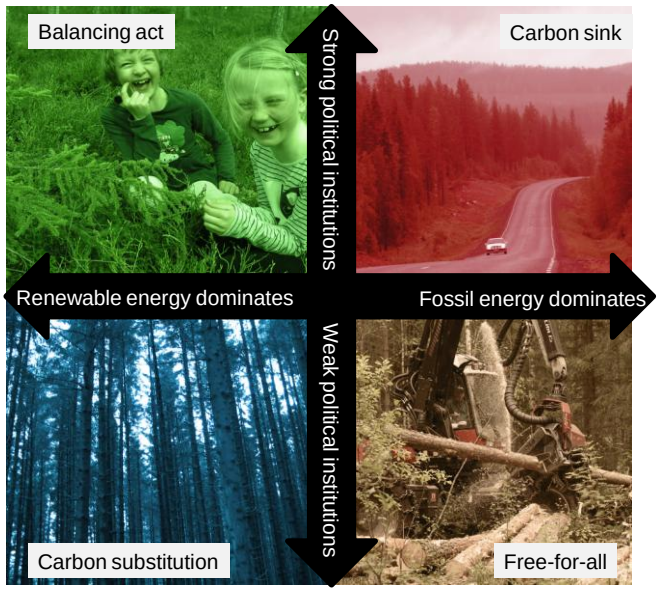
A structured process



Future Forests
Sustainable strategies under uncertainty and risk



Future Forests
Sustainable strategies under uncertainty and risk



Lessons learned

- THIS IS A PROCESS AND NOT AN END PRODUCT

- If stakeholders are an important audience, involve them in the whole process (cf. the BOGSAT problem)
- Foresights are powerful tools to deal with complex issues
- Build interdisciplinary skills
- Much more about today than about tomorrow
- Weaknesses: it is difficult to think in new ways, surprises will occur
- It takes time and money
- It is really difficult to stop thinking in forecasts

Forest Futures 2100
Experiences with a foresight process in Germany

Prof. Dr. Ulrich Schraml

Foresight on Future Demand for Forest-based Products and Services,
12-13 September 2011, Sekocin Stary, Poland

Institute of Forest and Environmental Policy
Albert-Ludwigs-Universität Freiburg

UNI FREIBURG

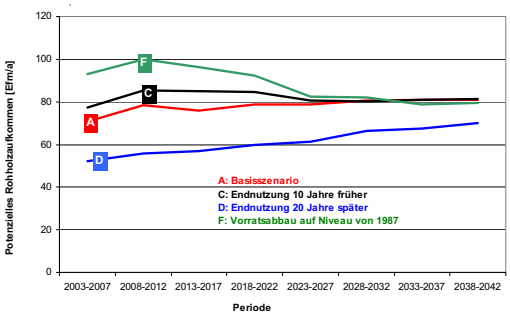
Contents

UNI FREIBURG

- Background
- Objectives and activities
- Outcomes and follow up
- Lessons learned

I) Background

German forestry and its orientation towards future



- dominance of silvicultural modelling (climate change)
- dominance of quantitative scenarios
- vagueness of the terms: prognosis – model – scenario in policy/business consulting
- in policy and enterprises: concentration on perception of only one alternative
- partly high influence on the political process and investment (national forest inventory)

Funding

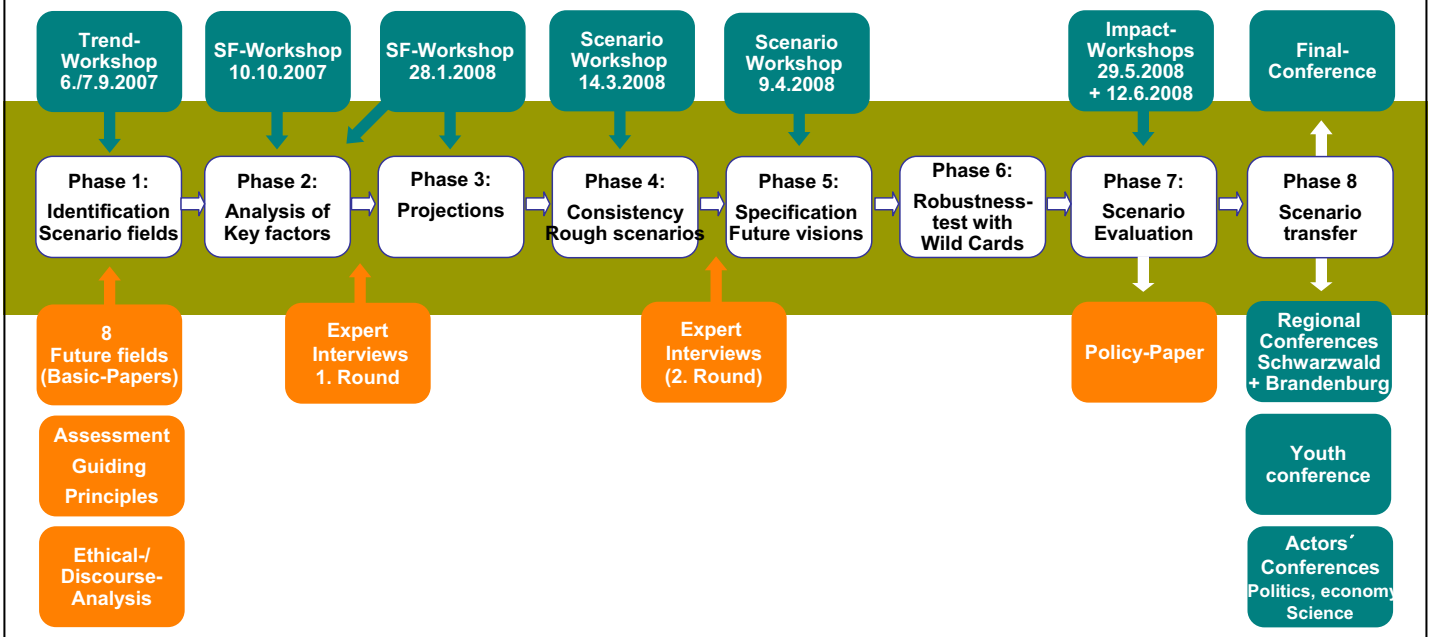
- Ministry of research (part of interdisciplinary program on forest use)
- 1 mio Euro

II) Objectives and activities

Objectives and structure of project

- Initiation of a debate about future of forest use in Germany (on basis of possible alternative developments, no forecasting but showing possibilities)
- Identification of fields of action and responsible stakeholders (compendium of ´future issues´)
- Target groups: everybody related to forests
- Team:
  - social scientists (coordination)
  - foresight specialists (scenario-process)
  - forest and environmental scientists (data collection, expertise, dissemination)
  - environmental ethics (advise on discourse)

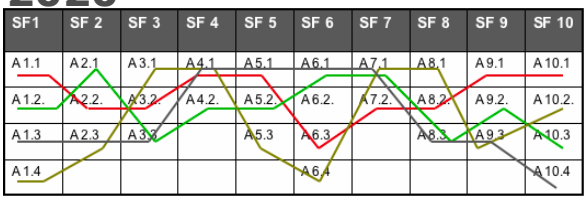
Course of the project



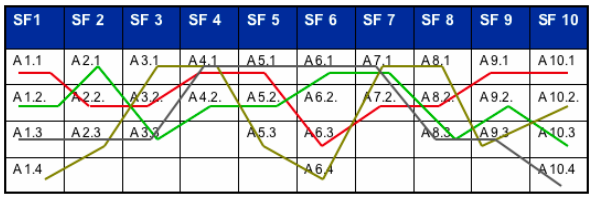
Source: Waldzukünfte 2100

Scenarios of forest use

2020

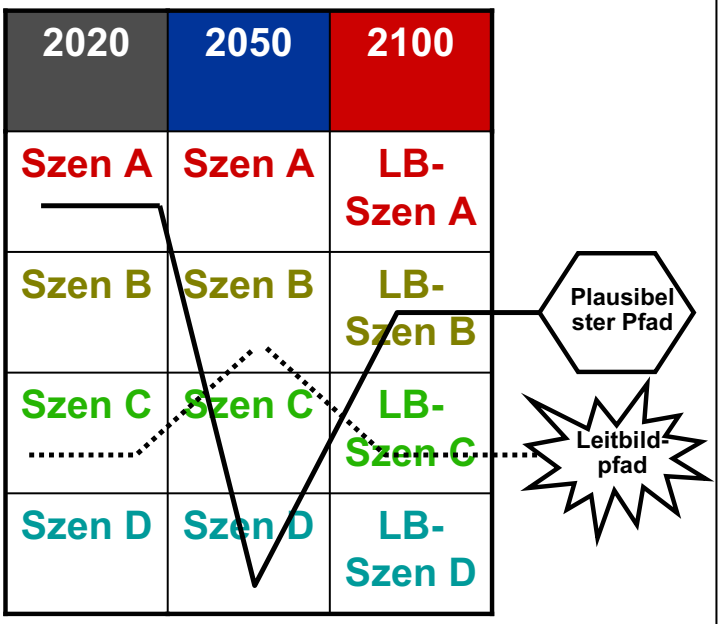


2050



2100

Leitbild-Szenario A
Leitbild-Szenario B
Leitbild-Szenario C
Leitbild-Szenario D



Source: Waldzukünfte 2100

III) Outcomes and follow up

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Expected outcomes of the project

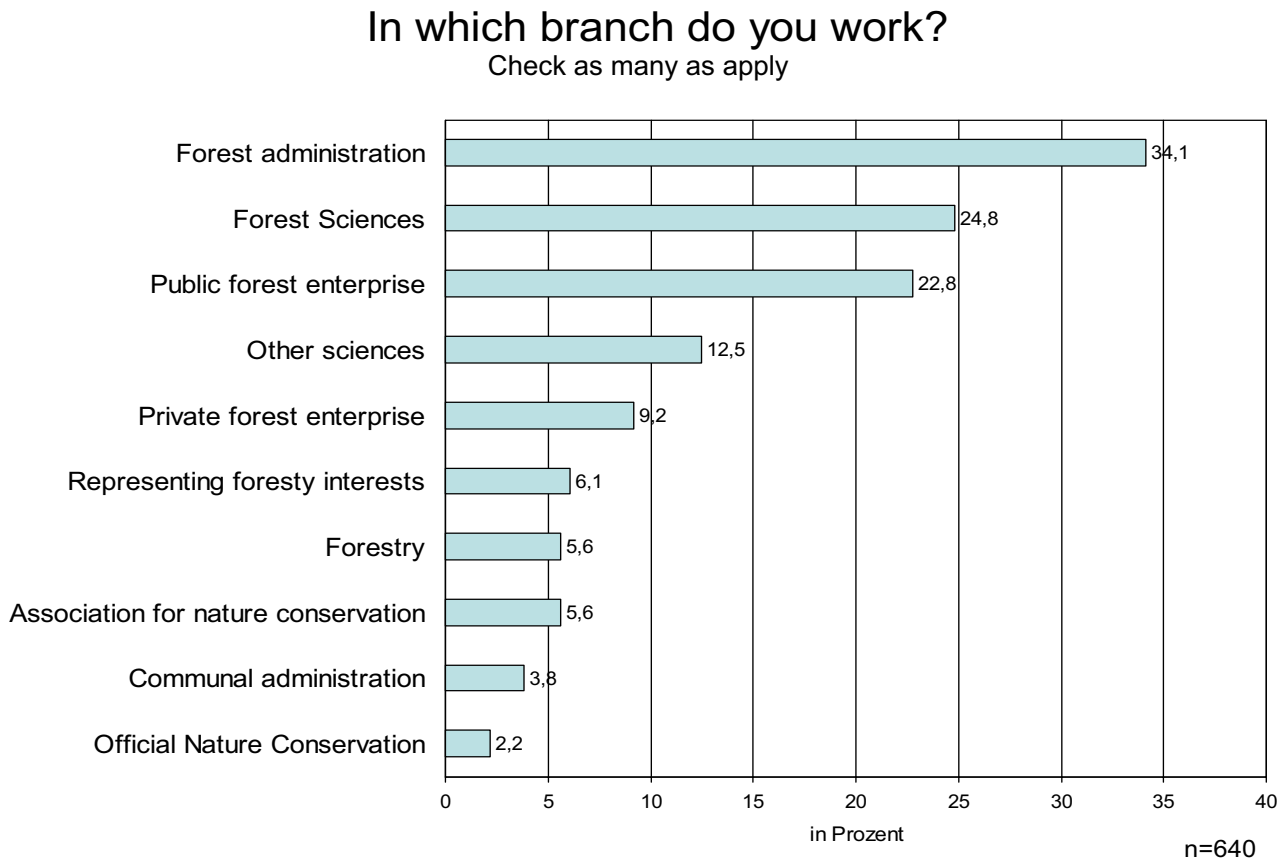
Discussion – Scenarios - Policy Paper - Discussion

Products

- basis papers
- ethic paper
- delphi study
- scenario report
- policy paper

cp. www.waldzukuenfte.de

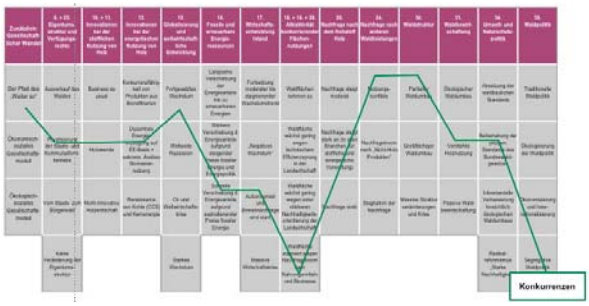
Interviewed groups of actors



Conclusions from the Delphi-Survey

- Dominance of the day to day politics in the visions on future (climate change embedded in technical-economical visions of future)
- Gaps in the social area
- Largely testified certainty concerning the assessments of trends
- Dominance of silvicultural technical strategies
- Despite similarities concerning the expectations big differences between the actors with respect to their strategies

Three scenarios of forest policy in Germany



Discerning advantages and risks of different policy-styles concerning their "fitness" for the future

- „Directive policy style"
- „Deregulation"
- "Muddling through"

Source: Waldzukünfte

Policy Paper: Eight challenges for forest policy

- Provision of comodities
- Climate change and ecosystem conservation
- New economical sectors
- New actors
- New use conflicts
- Change of forest property
- International forest policy
- Conveying knowledge on forests to the population

Source: Waldzukünfte 2100

Follow up

www.zalf.de

- <u>within institute:</u>
  - integration of outcomes in several research projects
  - good basis for applications
  - new EU project INTEGRAL
- <u>extern:</u>
  - contribution to strategy processes on state and federal level

IV) Lessons learned

Lessons learned: selection and cooperation of partners

- disciplinary diversity very helpful
- diverse quality of partners lead to compromises and lack of trust in overall project
- strong contribution of (expensive) consultants during project, weak contribution in dissemination phase (not funded)

Recommendation:
> mixed team, but no lead/majority of NON-forest-scientists in team
> funding for dissemination phase (2-3 years) important

Lessons learned: participation of stakeholders in process

- In general large interest among forestry and nature protection related actors (capacity problems among other groups)
- Sceptical attitude vs. the methodical approach and wrong expectations namely definite statements on future in timber industry
- Competing visions of future within research program

Recommendation:
Concentration on specific target groups
"*Every theater lives on its audience*"

Lessons learned: dissemination I

- in general high interest among stakeholders (plenty of presentations, publications, citations)
- concentration on policy paper, NOT basis papers or scenarios
- high interest of the general media (diverse quality of contributions: prognoses expetced, ´alarmism´)
- low interest of (private) timber industry (competing quantitative scenarios)

Recommendation:
be aware of networks and resources for dissemination

Lessons learned: dissemination II

Structural problems of implementation:

> competition between ministries on federal level (research, nature protection, agri/forest)

> diverse competences and weak coordination between states (laender) and federal level

Recommendation:
be prepared!

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Foresight on Future Demand for Forest-based Products and Services: Workshop and Final Conference

New EU Forestry Strategy: State of Play

María Gafo Gómez-Zamalloa
Unit H4 "Bioenergy, Climate change and forests"

European Commission
Agriculture and Rural Development

Sekocin Stary, Poland
12-13 September 2011

1. Forests and policy in the EU: background
2. New EU Forestry Strategy: state of play
3. New EU Forestry Strategy: possible contribution from Foresight
4. Conclusions

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1. Policy and research

- **Policy** is not an authoritative choice of values, it is a representation of a particular way of seeing and understanding the world.
- First step: **understanding** what the problem is before setting off to solve it. Here lies the **contribution of science** to policy.
- Scientists should pursue problems of **interest to society.**
- Sustaining forest sector depends upon building **collaborative partnerships** among scientists and policy makers.
- **Knowledge sharing** leads to reduced risks, innovation and success (imp. role of COST!)

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Foresight for the forest strategies

1. Forest sector: many cross-sectoral interactions

Nobody needs to be convinced of the complexity inherent in forest sector.

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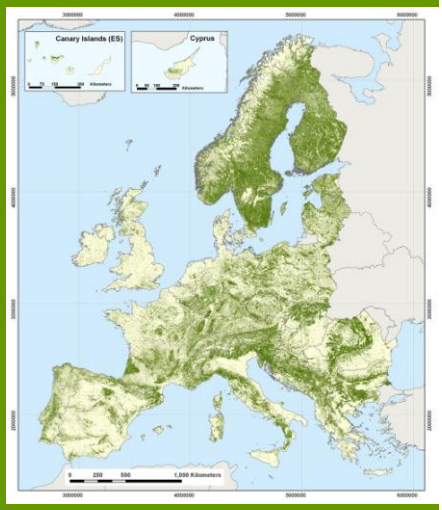
But, what are we talking about?

- Forest and other wooded land: 178 million ha (42%) of which 117 million ha are available for wood supply.
- Growing stock (FOWL):
  - 24 million m3
- Felling:
  - 60 % of the net annual increment in forest available for wood supply
- Ownership:
- 40% public and 60% private
- Certification:
- Around 50% of the forests are certified
-



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Forest in EU 2020 Strategy

SMART growth:

- Supporting innovation and skills, green technologies and uptake of research
- Providing incentives for social innovation

Rural Development

INCLUSIVE growth:

- Unlocking local potential, diversifying rural economies and developing local markets and jobs
- Opening-up alternative opportunities to accompany agricultural retructuring

SUSTAINABLE growth:

- Increasing resource efficiency and the provision of public goods
- Reducing emissions, enanching carbon sequestration and developing bioenergy
- Ensuring sustainable land management and addressing biodiversity loss

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Overall policy context:

- EU2020
- Review of the Common Agricultural Policy
- EU Biodiversity Strategy
- EU position on LULUCF
- EU targets on renewable energy sources
- EU FLEGT Action Plan and EU Timber Regulation
- Communication on “innovative and sustainable forest-based industries”
- Green Paper on forest protection and information
- International forest-related processes (UNFF, FLEG, REDD+..)

Forest Europe growing life

Legally binding agreement on Forests

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Foresight for the forest strategies

Forest policy framework:

1998: EU Forestry Strategy
2005: Implementation of the EU Forestry Strategy
2006: Forest Action Plan (2006-2011)
2011: Launch of the review of the EU Forestry Strategy

New Forestry Strategy to be adopted in the third quarter of 2012!

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1. Forests and policy in the EU: bakground

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4. Conclusions

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EU Forestry Strategy from 1998

- Resolution of the European Parliament calling for the Commission to put forward a proposal for such a strategy
- Communication from the Commission on a Forestry Strategy (1998)
- Highlights the **challenges** facing the EU forests, the policy and legal framework for forests and forestry in the EU as well as
- Identifies **common objectives and guiding principles** for the roles of the EU and the Member States in forest policy

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New EU Forestry Strategy

A. Workshop with Member States and Stakeholders

B. Working Group under the Standing Forestry Committee

C. Ex-post evaluation of the Forest Action Plan

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A. Workshop on the Review of the EU Forestry Strategy (15 April 2011):

How forests and forestry can contribute to EU2020 objectives

Exchange of views on expectations, new elements, issues to be strengthened

Input for the terms of reference for the WG under the Standing Forestry Committee

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A. Workshop: Outcome of the discussions

- Need for:
  - A strategic approach ("vision")
  - Prioritisation
  - Targets and indicators to measure progress

Success of the current strategy? Split views

- Coherence with other policies influencing and affecting forests not always achieved.
- Need to communicate outside the sector
- Although no forest policy in the Treaty, in several EU policies forests are important elements, which leads to a fragmented forest policy.

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Foresight for the forest strategies

A. Workshop: Outcome of the discussions

Content?

- Not just "forestry" but the "forest sector".
- Coordination is important but is not going to make the different interests and objectives on forests to go away. Need to face those different interests and find the right balance between them.
- The review should find also the balance between complementing and influencing national forest policies.
- Need to prioritise and find those areas where we can add value with common actions at EU level.

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B. Working Group on the new Forest Strategy

To contribute to the discussion on the future EU Forestry Strategy by making **recommendations** on:

➔ how the Strategy can ensure coherence with other polices or instruments and add value at EU level,

➔ what a future EU Forestry Strategy should include and/or what kind of alternative might replace it,

➔ which mechanisms could be put in place to achieve an effective and efficient instrument to support and underpin the implementation of forest related policies on EU, national and regional levels and joint EU actions relevant to forestry.

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Foresight for the forest strategies

C. Ex-post evaluation of the Forest Action Plan

➔ The mid-term evaluation was published in 2009

➔ Call for tenders for the ex-post evaluation just concluded.

➔ Ex-post Evaluation by March/April 2012

➔ Evaluation results to be considered for the revision of the EU forestry policy.

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➔

New EU Forestry Strategy: a unique opportunity

- To influence forest policy from a forest and forestry angle
- To put in place a common process to act on prioritised forest issues that will be agreed upon in the strategy work
- To give stronger voice to the forest sector

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Foresight for the forest strategies

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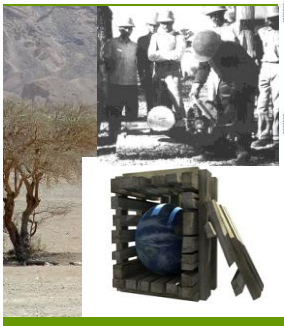
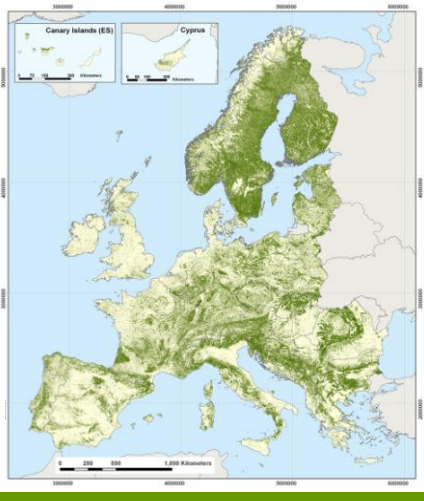
The concept of "super-forest"





Foresight for the forest strategies

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Foresight for the forest strategies

Contribution from foresight

Systematic, future-intelligence-gathering and vision-building process aimed at enabling present-day decisions.

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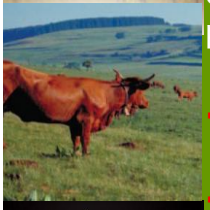

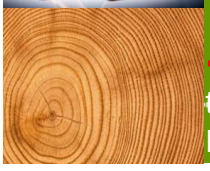

4. Conclusions

➔Sustaining forest sector depends upon building **collaborative partnerships** among scientists and policy makers.

➔**Forest sector** inherently **complex**

➔**EU forest: key resource for achieving the EU 2020 targets**

➔Without the **contribution from innovation and research**, we will not meet our objectives

➔Contribution from **Foresight**: methods to assess the contribution of the new EU Forest Strategy to EU2020 targets

4. Conclusions

➔New EU Forest Strategy: unique opportunity To influence forest policy from a forest and forestry angle, giving stronger voice to the forest sector.

➔It is only together that we can identify and implement the best ways to tackle the challenges that the forest sector faces

Dziękuję za uwagę!

Thank you for your attention!

http://ec.europa.eu/agriculture/index_es.htm

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Foresight for forest strategies – Futures wheel

September 12, 2011
Sekocin Stary, Poland

Back-to-back Workshop of the COST Strategic Workshop "Foresight on Future Demand for Forest-based Products and Services" – Final Conference

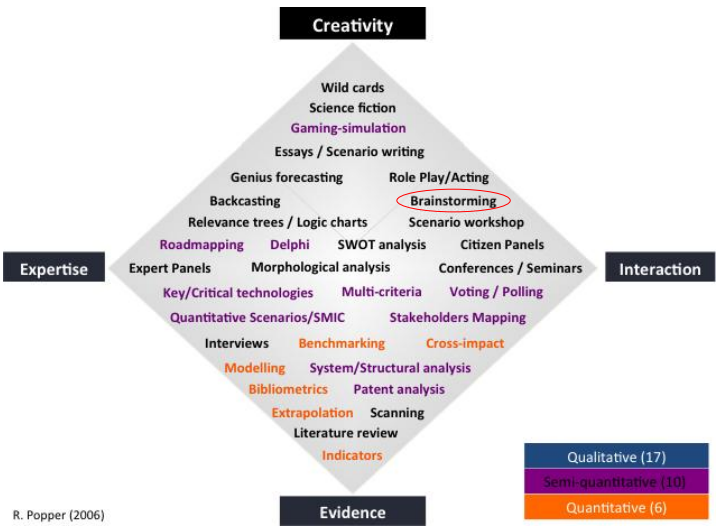
Aims of this afternoon

- To help start the Polish forest strategy work
- To provide a list of challenges and analyses of consequences and impacts that the strategy needs to address
- To test a structured foresight discussion

Foresight – the definition

Foresight is a systematic, participatory, future intelligence gathering and medium-to-long-term vision-building process aimed at present day decisions and mobilizing joint actions.

"Look before, or you might find yourself behind"
- Benjamin Franklin



R. Popper (2006)

Futures wheel – a structured brainstorming process

- Good method for:
  - Thinking through impacts of trends, events or challenges
  - Organizing thoughts
  - Showing complex interrelationships
  - Aiding in brainstorming processes
- Cheap, flexible, quick method

Mind map of primary and secondary consequences

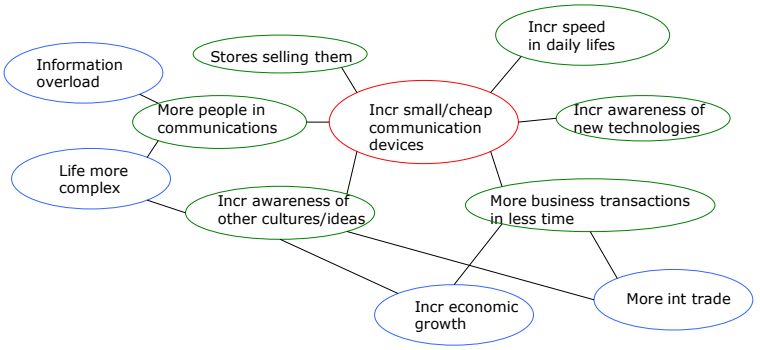
Identify trends or events that are of interest:

- "If this event occurs, what happens next?"

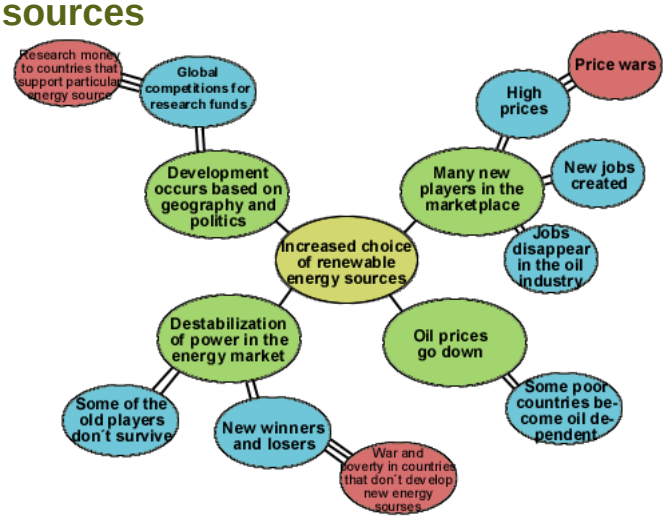
Or

- What are the impacts or consequences of this trend or event?"

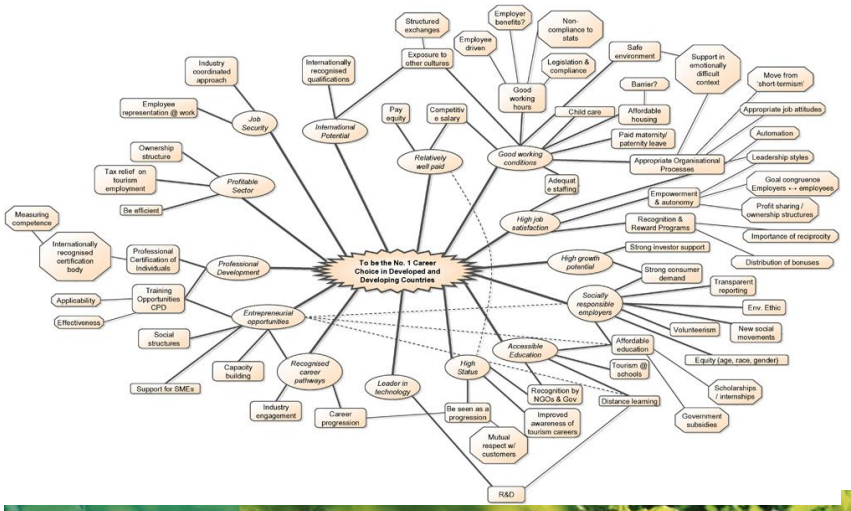
Futures wheel - example



Futures wheel on renewable energy sources



Futures wheel on employment and quality of life



What can you use it for?

- Basis for further thinking
- Basis for systematic exploration of feedbacks and consequences
- Input to a Polish forest strategy?

Today's exercise

1. Brainstorming in groups. List as many trends, events or challenges that you can think of that should be addressed in a Polish forest strategy (30 min)
2. Pick a trend/event/challenge and make a futures wheel analysis of the consequences. If time permits, pick another one (2 hrs)
3. Plenary (1 hr)

Groups

1 Kamil Grałek Karol Jańczuk Zbigniew Karaszewski Danuta Stańkowska Marcin Piszczek Michał Kalinowski	2 Mateusz Stopiński Marek Jabłoński Tomasz Girter Dorota Szpojda Piotr Musiał Dominika Kaczorowska
3 Olaf Dobrowolski Adam Kaliszewski Szymon Lis Marcin Łuczak Monika Starosta Paweł Gliński	4 Stanisław Wypych Anna Janusz Mariusz Opas Bartosz Standio Marcin Pawelec

Plenary

1. List of trends/events/challenges: what kind of factors did the groups identify, and why did you choose the one (or two) for the futures wheel exercise?
2. Examples of futures wheels and feedback from other groups.
3. Follow-up: how could this exercise be utilised in the strategy process?

Foresight for forest strategies

September 12, 2011
Sekocin Stary, Poland

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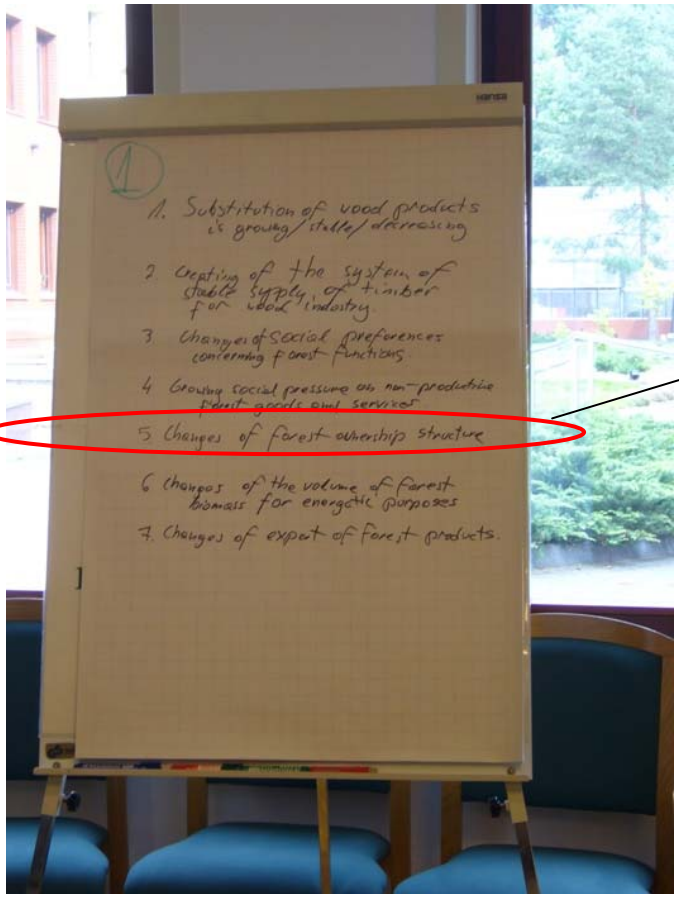
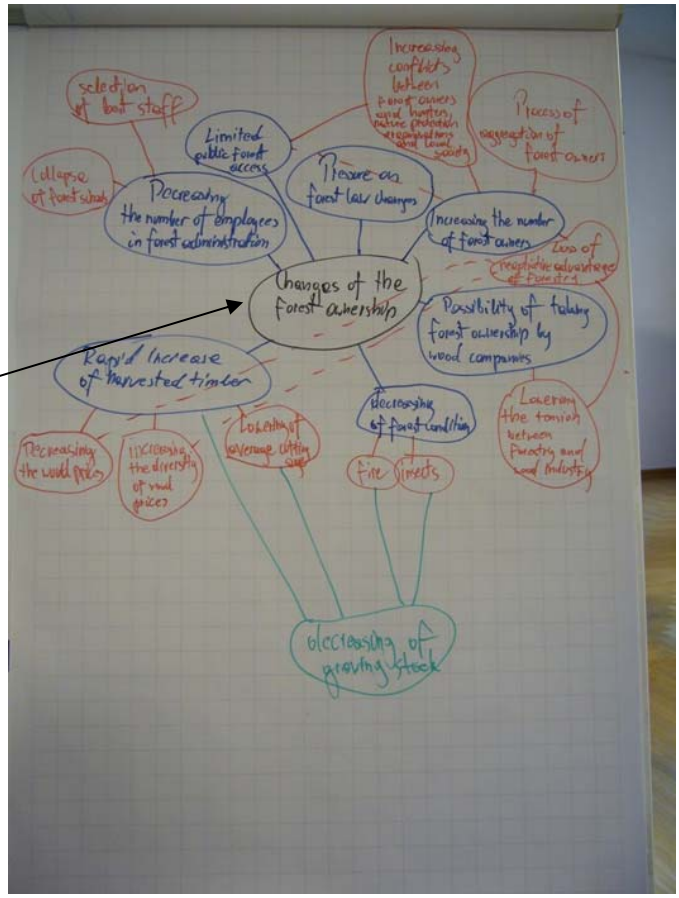
Substitution of wood products is growing/stable/decreasing
Creating the system of stable supply for wood industry
Changes of social preferences concerning forest functions
Growing social pressure on non-productive forest goods and services (two ways of consequences: marketing – or not - of non-productive goods and services)
Changes of forest ownership structure
Changes of the volume of forest biomass for energetic purposes
Changes of export of forest products

Increased demand of renewable energy sources
More focus on non-production forest functions
Changes in forest ownership structure
Economic growth vs nature protection
Increased supervision of the society

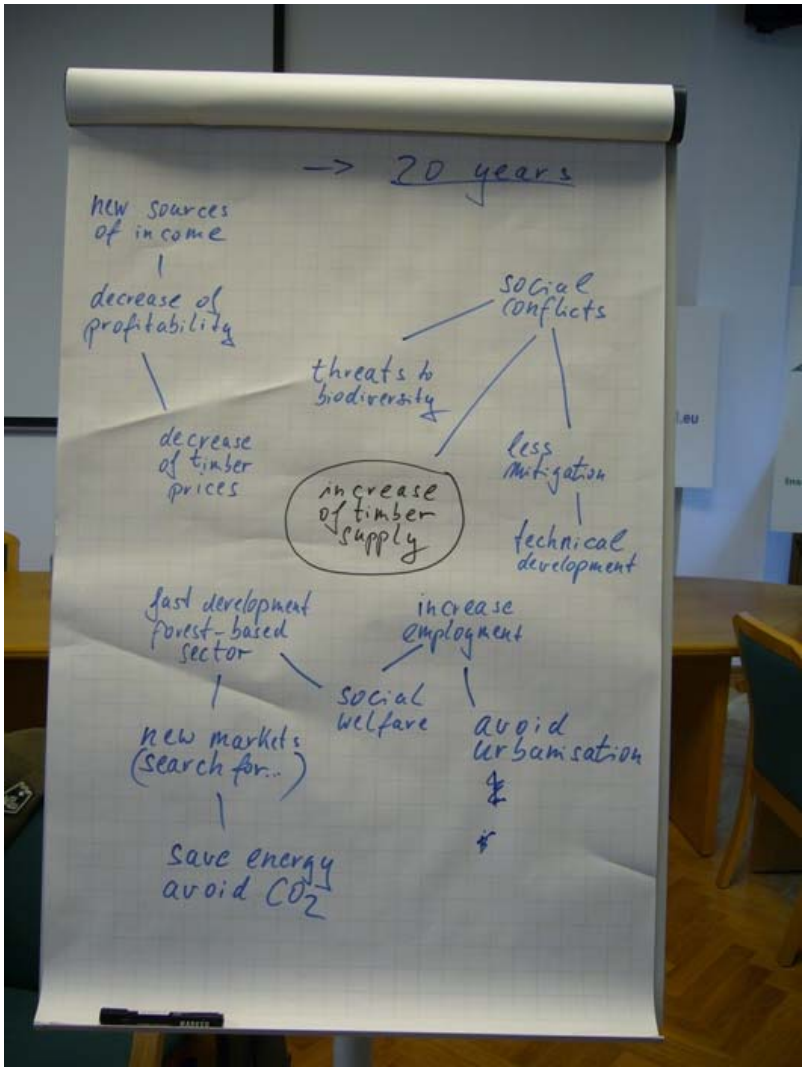
Nature 2000
Private forests
Afforestation program
Balance between forest sector and wood industry
Maintain profitability of state forest
Financial support for private forest owners
Conflict management
Climate change
Acceptation in society for forestry
Employment in forest sector
Technical trends and development
Forest research
Forest certification
Ecology in forest education

Growing demand on timber market
Social service – non product
Privatization of forest land
Change of legal situation of forest national holdings
Education on forest issues
European & global changes in timber market
Growing expectation on tourism, recreation etc
Nature protection problems
Who and how to pay for non-productive forest values
To many people interested in obtaining more from forests
Afforestation problems
Calamities (floods, windthrows, pests etc)
Dominant role of state forests
Communication (internal, external)
Education
Human resources management
Lack of small forestry stakeholders in Poland
Growing bioenergy demand
Unclear future timber demand
Forest certification


1
1. Substitution of wood products is growing / stable / decreasing
2. Creating of the system of stable supply of timber for wood industry
3. Changes of social preferences conferring forest functions
4. Growing social pressure on non-productive forest goods and services
5. Changes of forest ownership structure
6. Changes of the volume of forest biomass for energetic purposes
7. Changes of export of forest products.


selection of best staff
Increasing conflicts between forest owners and hunters, nature protection organizations and local society
Process of segregation of forest owners
Limited public forest access
Collapse of forest schools
Pressure on forest law changes
Decreasing the number of employees in forest administration
Increasing the number of forest owners
Loss of recreative advantages of forests
Changes of the forest ownership
Possibility of taking forest ownership by wood companies
Rapid increase of harvested timber
Decreasing of forest condition
Lowering the torsion between forestry and wood industry
Decreasing the wood prices
Increasing the diversity of wood prices
Lowering of coverage cutting size
Fire threats
Decreasing of growing stock


GMOs
NEW PESTS
EXOTIC SPECIES
DEGENERATION OF SOIL
NOW MULTI PURPOSE FOREST
NATURE CONSERVATION
PLANTATION
SHORT ROTATION
CHANGE IN LANDSCAPE
INCR. DEMAND OF RENEWABLE ENERGY RESOURCES (WOOD)
CONFLICT PRODUCTION AND NON-PRODUCT (NON-WOOD SERVICES)
CHANGE OF WOOD INDUSTRY
INCR PRICES
HIGH. CUTTING
CHANGE OF COMPOSITION OF WOOD SORTIMENTS
MECHANISATION


→ 20 years
new sources of income
decrease of profitability
social conflicts
threats to biodiversity
decrease of timber prices
increase of timber supply
less mitigation
technical development
fast development forest-based sector
increase employment
social welfare
avoid urbanisation
new markets (search for...)
save energy avoid CO2


HIGHER PRICES
HIGHER IMPORT
CONFLICT WITH NGO
HIGHER ANNUAL INCREMENT CUT RATE
BIODIVERSITY
POLICY
DEVELOPMENT OF WOOD-BASED MARKET and employment
INCREASE
TREE PLANTATION
CHANGE OF WOOD DEMAND
LOWER PRICES
DECREASE
BIGGER PROFITS OF WOOD COMPANIES
LOWER IMPORT
LOWER INVESTMENTS
EMPLOYMENT REDUCE @ STATE FOREST
- EDUCATION
- RECREATION
- NATURE PROTECTION
- EVERYTHING