**Maa- ja metsätalousministeriö** E-KIRJE MMM2013-00849

LVO Seppä Teemu(MMM) 24.10.2013
JULKINEN

*VASTAANOTTAJA*
*Eduskunta*
*Suuri valiokunta*

Viite

Asia
**Uusi EU:n metsästrategia: metsien ja metsäalan puolesta**

**U/E-tunnus:** **EUTORI-numero:**
**EU/2013/1532**

Ohessa lähetetään perustuslain 97§:n mukaisesti selvitys, joka koskee komission tiedonantoa uudesta EU:n metsästrategiasta.

Osastopäällikkö Juha Ojala

Ylitarkastaja Teemu Seppä

LIITTEET MMM2013-00850

| | |
|---|---|
| Asiasanat | metsät, metsäteollisuus |
| **Hoitaa** | **MMM, TEM** |
| Tiedoksi | EUE, OKM, SM, UM, VM, VNK, YM |

**Maa- ja metsätalousministeriö** PERUSMUISTIO MMM2013-00850

LVO Seppä Teemu(MMM) 24.10.2013
JULKINEN

Asia
**Uusi EU:n metsästrategia: metsien ja metsäalan puolesta**

Kokous

Liitteet Viite

EUTORI/Eurodoc nro:

EU/2013/1532

U-tunnus / E-tunnus:

Käsittelyn tarkoitus ja käsittelyvaihe:

EU:n vuoden 1998 metsästrategianuudistus käynnistyi komission pysyvässä metsäkomiteassa vuonna 2010. Vuosina 2011–2012 toimi jäsenmaiden, sidosryhmien ja komission edustajista koostunut työryhmä, joka laati suosituksia uutta strategiaa varten. Komissio julkaisi *Uusi EU:n metsästrategia: metsien ja metsäalan puolesta* -tiedonannon 20. syyskuuta 2013. Strategia esiteltiin maatalousneuvostossa 23. syyskuuta. Liettuan johdolla strategiasta laaditaan neuvoston päätelmät, jotka on tarkoitus hyväksyä joulukuun maatalousneuvostossa. Liettua esittänee ensimmäisen luonnoksen päätelmätekstistä neuvoston metsätaloustyöryhmässä 30. lokakuuta ja käsittely jatkuu seuraavassa metsätaloustyöryhmässä 3. joulukuuta. Strategian toimeenpanon on tarkoitus alkaa neuvoston päätelmien jälkeen loppuvuonna 2013 tai alkuvuodesta 2014.

Asiakirjat:

COM(2013) 659 final
Komission tiedonanto Euroopan parlamentille, neuvostolle, Euroopan talous- ja sosiaalikomitealle ja alueiden komitealle; Uusi EU:n metsästrategia: metsien ja metsäalan puolesta

SWD(2013) 342 final
Commission staff working document

SWD(2013) 343 final
Commission staff working document; A blueprint for the EU forest-based industries (woodworking, furniture, pulp & paper manufacturing and converting, printing)

EU:n oikeuden mukainen oikeusperusta/päätöksentekomenettely:

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Käsittelijä(t):

MMM, ylitarkastaja Teemu Seppä, puh. 0295162158

Suomen kanta/ohje:

Valtioneuvosto on pitänyt EU:n metsästrategian uudistamista tarpeellisena ja vaikuttanut siihen aktiivisesti. Metsäsektoriin vaikuttava muiden sektoreiden säätely on lisääntynyt ja mm. ilmasto- ja energiakysymysten myötä metsäasiat ovat siirtyneet EU-politiikan keskiöön, vaikka yhteistä metsäpolitiikkaa ei ole. Vuoden 1998 strategia ei ole ollut riittävän tehokas työkalu vastaamaan EU:n eri sektoreiden luomiin metsäsektoria koskeviin haasteisiin ja ristiriitaiseen sääntelyyn. Vahva metsästrategia on siis nähty tarpeelliseksi. Valtioneuvosto on strategian valmistelun aikana korostanut alla mainittuja periaatteita:

- Strategia ei saa muuttaa toimivaltasuhteita komission ja jäsenmaiden välillä.
- Strategian tulee olla kokonaisvaltainen, ja sen tulee korostaa metsien monikäyttöä ja niiden tarjoamia erilaisia tuotteita ja palveluja sekä kattaa koko metsäsektorin arvoketju metsästä aina valmiisiin tuotteisiin asti. Strategian tulee edistää kasvua, sektorin kilpailukykyä ja puun monipuolista käyttöä edistäen uusiutuviin raaka-aineisiin pohjautuvan biotalouden rakentamista.
- Strategian poliittisen statuksen tulee olla vahva.
- Strategian tulee parantaa metsäsektoriin vaikuttavien aloitteiden koordinaatiota komission sisällä sekä komission ja jäsenmaiden välillä. Metsäsektorin vaikuttamismahdollisuuksia sektoriin vaikuttaviin hankkeisiin tulee parantaa. Pysyvän metsäkomitean, neuvoa-antavan metsäteollisuuskomitean ja neuvoa-antavan metsätalous- ja korkkikomitean rooleja tulee vahvistaa ja selkeyttää. Sidosryhmien osallistumista aloitteiden valmisteluun tulee parantaa.
- Koska monet metsiin vaikuttavat EU-säädökset saavat alkunsa maailmanlaajuisista ongelmista, tulee EU:n tavoitteet kansainvälisissä, metsiin vaikuttavissa politiikkaprosesseissa kytkeä EU:n metsästrategiaan ja päinvastoin.
- Strategian toimeenpano tulee varmistaa metsätoimintaohjelman tai vastaavan avulla. Toimeenpanossa erityishuomiota tulee kiinnittää metsien taloudellista merkitystä, käyttöä ja kilpailukykyä koskeviin kirjauksiin, joilla ei ole tukenaan olemassa olevaa EU-lainsäädäntöä.

Lisäksi valtioneuvosto on korostanut, että ainakin seuraavien toimien tulisi sisältyä strategiaan:

- Monipuolisen puunkäytön ja puutuotteiden edistäminen.
- Metsäsektoritutkimuksen, kehittämisen ja kaupallistamisen vahvistaminen; vahvat linkit hallinnon, tieteen ja liike-elämän välillä.
- Maaseudun kehittämisen metsätoimet linjassa strategian tavoitteiden kanssa.
- EU-tasoisen metsätiedon edistäminen.
- Metsätuholaisten torjuminen ja ennaltaehkäisy.
- Metsiin vaikuttavat muiden sektoreiden toimet, kuten esim. EU:n biodiversiteettistrategian toimet.
- Puuraaka-aineeseen kohdistuvien eri kestävyysvaatimusten tarkastelu.

Valtioneuvosto vaikuttaa strategiaa käsitteleviin neuvoston päätelmiin ja strategian toimeenpanoon yllä mainittujen linjausten mukaisesti. Valtioneuvosto myös vaikuttaa siihen, että strategian toimeenpanoa vahvistamaan laaditaan metsätoimintaohjelma tai että strategian toimeenpano saadaan jollain muulla tapaa suunnitelmalliseksi ja järjestelmälliseksi. Valtioneuvosto tulee erityisesti vaikuttamaan siihen millaiseksi strategiassa mainittu kestävän metsänhoidon tarkastelu muodostuu. Mahdollisen kestävyyden tarkastelun tulisi pohjautua voimassa oleviin kriteereihin, indikaattoreihin sekä valvonta- ja seurantatyökaluihin ja pysyä maa- tai aluetasolla. Valtioneuvosto seuraa tarkasti, ettei strategian toimeenpano muuta toimivaltasuhteita komission ja jäsenmaiden välillä.

Pääasiallinen sisältö:

Taustaa

EU:n vuodelta 1998 olevan metsästrategian[1] uudistus käynnistyi komission pysyvässä metsäkomiteassa vuonna 2010. Vuosina 2011–2012 toimi jäsenmaiden, sidosryhmien ja komission edustajista koostunut asiantuntijatyöryhmä, joka loppuraportissaan[2] esitti suosituksia uutta strategiaa varten. Maa- ja metsätalousministeriön edustaja toimi työryhmän toisena puheenjohtajana.

Yleistä

Strategia on kokonaisvaltainen. Se käsittelee koko metsäsektorin arvoketjua, ja siihen sisältyy toimia koordinaation parantamiseksi ja metsäsektorin vaikutusmahdollisuuksien vahvistamiseksi. Toimivaltasuhteita ei kuitenkaan olla muuttamassa. Strategiaan on sisällytetty jo olemassa olevia eri sektoreiden metsiin liittyviä tavoitteita ja toimia ja lisäksi esitetään uusia. Metsätoimintaohjelman laatimista strategiassa ei mainita. Strategia jo itsessään tosin sisältää lukuisia toimia joka tavoitteen osalta.

Sisällöstä luvuittain

1 EUROOPPA TARVITSEE METSIÄÄN
Kuvaillaan EU:n metsien ja metsäsektorin merkitystä. Korostetaan metsien sosioekonomista merkitystä ja todetaan tarve ottaa myös metsäteollisuus strategian piiriin. Kuvaillaan metsiin vaikuttavia EU-politiikkoja ja toimivaltasuhteita. Viitataan metsien kestävän hoidon ja käytön käsitteeseen[3], sekä kuvaillaan vuoden 1998 metsästrategiaa ja siitä tehtyä arviointia.

2 MIKSI UUTTA KEHYSTÄ TARVITAAN?
Esitellään perusteet uudelle metsästrategialle. Metsiin kohdistuvat vaatimukset ja säätely ovat lisääntyneet ja toimintaympäristö on hajanainen. Tarvitaan koordinaatiota ja johdonmukaisuutta metsiin vaikuttavien sektoripolitiikkojen osalta. Toisaalta esitetään tarve vastata sektoriin kohdistuviin uusiin haasteisiin ja mahdollisuuksiin, varmistaa että metsiä käytetään kestävästi sekä kehittää uusia tuotteita.

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[1] Communication from the Commission to the Council and the European Parliament on a Forestry Strategy for the European Union
http://ec.europa.eu/agriculture/fore/forestry_strategy_en.htm

[2] Report of the Standing Forestry Committee ad hoc Working Group VII contributing to the development of a new EU Forest Strategy
http://ec.europa.eu/agriculture/fore/publi/index_en.htm

[3] *Kestävä metsänhoito tarkoittaa metsien ja metsäalojen käyttöä sellaisella tavalla ja tehokkuudella, että ne säilyttävät biologisen monimuotoisuutensa, tuottavuutensa, uusiutumiskykynsä, elinvoimansa ja kykynsä täyttää nykyisin ja tulevaisuudessa asiaankuuluvat ekologiset, taloudelliset ja yhteiskunnalliset tehtävänsä paikallisella, kansallisella ja maailmanlaajuisella tasolla aiheuttamatta haittaa muille ekosysteemeille.*
Euroopan metsiensuojelua käsittelevä ministerikonferenssi, Helsinki, 1993.

3 JATKOTOIMET: UUSI EU:N STRATEGIA METSIEN JA METSÄALAN PUOLESTA

Esitellään strategian rakenne, pääperiaatteet (*guiding principles*), tavoitteet ja kahdeksan ensisijaista alaa (*priority areas*).

**Pääperiaatteet**

*- Kestävä metsänhoito ja metsien monikäyttö, joka tuottaa monenlaisia tuotteita ja palveluita tasapainoisella tavalla ja takaa metsien suojelun.*
*- Resurssitehokkuus, jolla optimoidaan metsien ja metsäalan panos maaseudun kehitykseen, kasvuun ja työpaikkojen luomiseen.*
*- Maailmanlaajuinen vastuu metsistä, jolla edistetään metsätuotteiden kestävää tuotantoa ja kulutusta.*

**Vuoden 2020 metsätavoitteet**

*Varmistetaan ja osoitetaan, että kaikkia EU:n metsiä hoidetaan kestävän metsänhoidon periaatteiden mukaisesti ja että EU:n panosta kestävän metsänhoidon edistämiseksi ja metsäkadon vähentämiseksi koko maailmassa vahvistetaan, eli:*
*- edistetään metsien eri toimintojen tasapainottamista, vastataan kysyntään ja tuotetaan elintärkeitä ekosysteemipalveluja;*
*- tarjotaan metsätaloudelle ja koko metsäalan arvoketjulle perusta, jonka avulla ne voivat edistää kilpailukykyisesti ja kannattavasti biopohjaista taloutta.*

**Kahdeksan ensisijaista alaa**

***Kestävä metsänhoito edistää tärkeiden yhteiskunnallisten tavoitteiden saavuttamista***

*1) Maaseutu- ja kaupunkiyhteisöjen tukeminen*
Korostetaan metsäsektorin merkitystä maaseutujen hyvinvoinnin ja työllisyyden lähteenä. Kannustetaan jäsenmaita hyödyntämään metsätoimenpiteitä kansallisissa maaseudun kehittämisohjelmissaan.

*2) EU:n metsäteollisuuden, bioenergia-alan ja laajemman vihreän talouden kilpailukyvyn ja kestävyyden edistäminen*
Metsäteollisuusosio, johon liittyy erillinen tausta-asiakirja. Edistetään puunkäyttöä ja biotaloutta. Tähän kohtaan sisältyy myös kirjaus ns. kiinteän biomassan energiakäytön kestävyyskriteereistä[4], joita energiapääosasto on valmistellut.

*3) Metsät muuttuvassa ilmastossa*
Todetaan metsäsektorin potentiaali ilmastonmuutoksen hillinnässä ja toisaalta tarve edistää metsien sopeutumista muutokseen. Jäsenmaat raportoivat toimista ns. LULUCF-päätöksen[5] mukaisesti.

*4) Metsien suojelu ja ekosysteemipalvelujen tehostaminen*
Tähän sisältyy EU:n ympäristölainsäädännön ja biodiversiteettistrategian metsätavoitteet, mm. tavoite lisätä metsäsuunnitelmien tai vastaavien käyttöä. Metsätuholaisten torjunnan ja ekosysteemipalvelujen arvottamisen osalta ehdotetaan lisätoimia.

***Tietopohjan parantaminen***

*5) Millaisia metsiä meillä on ja miten ne muuttuvat?*

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[4] E 42/2013 vp. Valtioneuvoston selvitys biomassan kestävyyskriteereistä

[5] E 48/2012 vp. Euroopan parlamentin ja neuvoston päätös maankäyttöön, maankäytön muutokseen ja metsätalouteen liittyvistä toimista peräisin olevia kasvihuonekaasujen päästöjä ja poistumia koskevista tilinpitosäännöistä ja toimiin liittyviä toimenpiteitä koskevasta tiedosta (529/2013/EU)

Ehdotetaan EU:n tasoisen metsätiedon lisäämistä ja EU:n metsätietojärjestelmän rakentamista. Työ on jo käynnissä, linkittyy metsätietoa ja metsien suojelua koskevan vihreän kirjan[6] käynnistämään työhön.

*6) Uusi ja innovatiivinen metsätalous ja lisäarvotuotteet*
Ehdotetaan metsäsektoriin liittyvän tutkimustyön tukemista EU:n tutkimusohjelmissa kuten Horizon 2020. Yhteistyötä tieto- ja osaamispuutteiden korjaamiseksi korostetaan.

***Koordinoinnin ja viestinnän lisääminen***

*7) Yhteistyötä metsien hoitamiseksi johdonmukaisesti ja niiden ymmärtämiseksi paremmin*
Tässä osiossa korostetaan koordinaation ja politiikkajohdonmukaisuuden parantamista. Keinoina mm. pysyvän metsäkomitean roolin vahvistaminen. Teollisuuspääosaston neuvoa-antava metsäteollisuuskomitea on toinen tärkeä ryhmä, ja sidosryhmiä osallistetaan neuvoa-antavan metsätalous- ja korkkikomitean kautta. Tiedotus on myös tärkeässä roolissa.

*8) Metsät globaalista näkökulmasta katsottuna*
Yleiseurooppalaisella tasolla painopiste on meneillään olevissa Euroopan metsäsopimusneuvotteluissa. Uuden strategian katsotaan muodostavan sopivan välineen sopimuksen täytäntöönpanoa varten. Maailmanlaajuisella tasolla EU edistää metsien kestävää hoitoa ja käyttöä ja pyrkii varmistamaan metsiin liittyvien sitoumusten johdonmukaisuuden.

4 PERIAATTEISTA TOIMINNAKSI: YHTEISTYÖTÄ METSIEN JA METSÄALAN PUOLESTA
Komissiota ja jäsenmaita kehotetaan ottamaan strategian tavoitteet huomioon kaikessa toiminnassaan. Komissio jatkaa työtä yhdessä pysyvän metsäkomitean kanssa. Jäsenmaita kehotetaan miettimään alueita, joissa olisivat valmiit menemään pidemmälle; esimerkkeinä mainitaan metsäpalojen ja metsätuholaisten torjunta sekä puunkäytön edistäminen.

5 PÄÄTELMÄT
Tarvitaan yhteisesti sovittua kokonaisvaltaista strategista näkemystä metsäkysymyksistä. Strategian toimeenpanoa arvioidaan 2018. Parlamentin ja neuvoston toivotaan hyväksyvän strategian ja antavan näkemyksiä toimeenpanon suhteen.

Kansallinen käsittely:

EU:n metsästrategian uudistamista on käsitelty metsäjaostossa useita kertoja valmistelun käynnistyttyä komission pysyvässä metsäkomiteassa vuonna 2010 ja metsästrategiaa valmistelleen työryhmän aikana 2011–2012. Metsästrategia esiteltiin metsäjaostossa 26. syyskuuta 2013. E-kirje oli metsäjaoston kirjallisessa käsittelyssä 16.–24. lokakuuta 2013.

Eduskuntakäsittely:

Valtioneuvoston E-kirje lokakuussa 2013.

Käsittely Euroopan parlamentissa:

Euroopan parlamentti laatinee resoluution metsästrategiasta.

Kansallinen lainsäädäntö, ml. Ahvenanmaan asema:

[6] E 25/2010 vp. Vihreä kirja metsien suojelusta ja metsätiedosta EU:ssa: varautuminen ilmastonmuutokseen (SEK(2010)163 final)

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Taloudelliset vaikutukset:

Ei välittömiä kustannusvaikutuksia.

Muut mahdolliset asiaan vaikuttavat tekijät:

| | |
|---|---|
| Asiasanat | metsät, metsäteollisuus |
| **Hoitaa** | **MMM, TEM** |
| Tiedoksi | EUE, OKM, SM, UM, VM, VNK, YM |

EUROOPAN
KOMISSIO

Bryssel 20.9.2013
COM(2013) 659 final

# KOMISSION TIEDONANTO KOMISSION TIEDONANTO EUROOPAN PARLAMENTILLE, NEUVOSTOLLE, EUROOPAN TALOUS- JA SOSIAALIKOMITEALLE JA ALUEIDEN KOMITEALLE

## Uusi EU:n metsästrategia: metsien ja metsäalan puolesta

{SWD(2013) 342 final}
{SWD(2013) 343 final}

**KOMISSION TIEDONANTO KOMISSION TIEDONANTO EUROOPAN PARLAMENTILLE, NEUVOSTOLLE, EUROOPAN TALOUS- JA SOSIAALIKOMITEALLE JA ALUEIDEN KOMITEALLE**

**Uusi EU:n metsästrategia: metsien ja metsäalan puolesta**

## 1 EUROOPPA TARVITSEE METSIÄÄN

Metsät ja muu metsämaa peittävät yli 40 prosenttia EU:n maa-alasta, ja metsien luonne vaihtelee suuresti eri alueilla. Metsitys ja luonnollinen kasvu ovat lisänneet EU:n metsäpinta-alaa noin 0,4 prosenttia vuodessa viime vuosikymmeninä. Maailmanlaajuisesti metsäpinta-ala kuitenkin pienenee edelleen. Tällä hetkellä EU:ssa hakataan vain 60–70 prosenttia vuotuisesta kasvusta, ja siksi kasvavien puiden määrä lisääntyy. Maankäyttöä, maankäytön muutosta ja metsätaloutta (LULUCF) koskevien jäsenvaltioiden ennusteiden mukaan hakkuiden määrän odotetaan vuoteen 2020 mennessä kuitenkin lisääntyvän noin 30 prosenttia verrattuna vuoteen 2010.[1] Noin 60 prosenttia metsistä on useiden miljoonien yksityisten omistajien omistuksessa[2], ja näiden määrä kasvaa, kun metsien omistusoikeuden palauttaminen jatkuu eräissä jäsenvaltioissa. Loppuosa kuuluu valtioille ja muille julkisille omistajille.

Metsät ovat monikäyttöisiä ja palvelevat taloudellisia, sosiaalisia ja ympäristötarkoituksia. Ne tarjoavat elinympäristöjä eläimille ja kasveille, ja niillä on tärkeä tehtävä ilmastonmuutoksen hillitsemisessä ja muissa ympäristöpalveluissa. Lähes neljäsosa EU:n metsien pinta-alasta on suojeltu Natura 2000 -verkoston nojalla, ja suuri osa lopuista metsistä on EU:n luonnonsuojelulainsäädännön nojalla suojeltujen lajien elinympäristönä. Metsät tarjoavat myös runsaasti muun muassa ihmisten terveyteen, virkistykseen ja matkailuun liittyviä yhteiskunnallisia hyötyjä.[3]

Metsien sosioekonominen merkitys on suuri, mutta sitä aliarvioidaan usein. Metsät edistävät maaseudun kehitystä ja tarjoavat noin kolme miljoonaa työpaikkaa. Puu on yhä tärkein metsistä saatavien tulojen lähde. Siksi strategiassa tarkastellaan myös EU:n metsäteollisuutta, joka kuuluu EU:n teollisuuspolitiikan piiriin. Puuta pidetään myös tärkeänä raaka-aineen lähteenä kehittyville biopohjaisille teollisuudenaloille.

Metsien biomassa on tällä hetkellä tärkein uusiutuvan energian lähde, ja se muodostaa nykyisin noin puolet EU:n uusiutuvan energian kokonaiskulutuksesta. Uusiutuvia energialähteitä koskevien kansallisten toimintasuunnitelmien mukaan lämmitykseen, jäähdytykseen ja sähköntuotantoon käytettävä biomassa auttaisi saavuttamaan noin 42 prosenttia vuodeksi 2020 asetetusta uusiutuvan energian 20 prosentin osuutta koskevasta

[1] UNFCCC:lle päätöksen CMP.6 mukaisesti toimitettujen EU:n metsänhoidon viitetasoja koskevien ennusteiden perusteella.

[2] Metsänomistajien arvioiden mukaan määrä on 16 miljoonaa. Vaikka yksityisten metsänomistajien määrä on varsin suuri, heidän omistamiensa metsien osuus metsäpinta-alasta on suhteellisen pieni ja usein hajanainen.

[3] Lisätietoja on vihreässä kirjassa metsien suojelusta ja metsätiedosta, KOM(2010) 66.

tavoitteesta. Jos tämä saavutetaan, EU:ssa energiantuotantoon käytettävän puun määrä olisi yhtä suuri kuin korjatun puun kokonaismäärä nykyisin. Metsistä saadaan myös paljon muita tuotteita, kuten korkkia, hartseja, sieniä, pähkinöitä, riistaa ja marjoja.

Kestävän metsänhoidon varmistaminen on erittäin tärkeää, jotta näitä hyötyjä voidaan tuottaa tasapainoisella tavalla.

> Kestävä metsänhoito tarkoittaa metsien ja metsäalojen käyttöä sellaisella tavalla ja tehokkuudella, että ne säilyttävät biologisen monimuotoisuutensa, tuottavuutensa, uusiutumiskykynsä, elinvoimansa ja kykynsä täyttää nykyisin ja tulevaisuudessa asiaankuuluvat ekologiset, taloudelliset ja yhteiskunnalliset tehtävänsä paikallisella, kansallisella ja maailmanlaajuisella tasolla aiheuttamatta haittaa muille ekosysteemeille.[4]

Vaikka EU:n toiminnasta tehdyssä sopimuksessa ei ole erityisiä määräyksiä EU:n metsäpolitiikasta, EU on jo pitkään edistänyt toimillaan kestävän metsänhoidon toteuttamista ja jäsenvaltioiden metsiä koskevia päätöksiä. Merkittäviä kehitysaskelia ovat olleet muun muassa kasvua ja työllisyyttä koskeva Eurooppa 2020 -strategia, resurssitehokkuutta koskeva etenemissuunnitelma, maaseudun kehittämispolitiikka, teollisuuspolitiikka, EU:n ilmasto- ja energiapaketti vuodeksi 2020 asetettuine tavoitteineen, kasvien terveyttä ja lisäysaineistoa koskeva strategia sekä luonnon monimuotoisuutta ja biotaloutta koskevat strategiat.[5]

Vuonna 1998 hyväksytyllä EU:n metsästrategialla[6] perustettiin toissijaisuusperiaatteen ja jaetun vastuun periaatteen perusteella kehys sellaisia metsäalan toimia varten, joilla tuetaan metsien kestävää hoitoa ja käyttöä ja jotka perustuvat EU:n ja jäsenvaltioiden toimintalinjojen ja aloitteiden yhteistyöhön perustuviin ja hyödyllisiin yhteyksiin. Metsänhoitoa koskeva toimintasuunnitelma[7] 2007–2011 oli merkittävä väline strategian täytäntöön panemiseksi, ja siinä käsiteltiin neljää tavoitetta: kilpailukykyä, ympäristöä, elämänlaatua sekä koordinointia ja viestintää. Metsätaloustoimenpiteiden yhteisrahoitus maaseudun kehittämisasetuksen nojalla on ollut ja on jatkossakin tärkein EU:n tason rahoituskeino.

Metsänhoitoa koskevan toimintasuunnitelman jälkiarvioinnissa korostettiin tarvittavan uutta metsästrategiaa, jossa laaditaan ja toteutetaan yhteinen visio monikäyttöisestä ja kestävästä metsänhoidosta Euroopassa, määritellään ensisijaisia toimia ja tavoitteita, kytketään EU:n ja jäsenvaltioiden rahoitusstrategiat ja -suunnitelmat toisiinsa, vahvistetaan johdonmukaista monialaista toimien suunnittelua, rahoittamista ja toteuttamista, luodaan selvät seuranta-, arviointi- ja raportointimekanismit ja tarkastellaan uudelleen sidosryhmien osallistumista. Tässä tiedonannossa tuetaan näitä suosituksia antamalla strategisia suuntaviivoja.

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4 Euroopan metsiensuojelua käsittelevä ministerikonferenssi, Helsinki, 1993.
5 KOM(2011) 244 ja COM(2012) 60.
6 Neuvoston päätöslauselma, annettu 15 päivänä joulukuuta 1998, Euroopan unionin metsästrategiasta.
7 KOM(2006) 302.

## 2 MIKSI UUTTA KEHYSTÄ TARVITAAN?

Viidentoista viime vuoden aikana merkittävät yhteiskunnalliset ja poliittiset muutokset ovat vaikuttaneet siihen, miten EU:n yhteiskunta suhtautuu metsiin ja metsäalaan. Yleistilanteelle on tunnusomaista metsiin kohdistuvien vaatimusten ja uhkien lisääntyminen. Samalla metsäalaa koskevien toimintalinjojen lisääntyminen luo monimutkaisen ja hajanaisen metsäpoliittisen toimintaympäristön. Kansainvälisten elintarvike-, rehu-, kuitu- ja polttoainemarkkinoiden välisten yhteyksien lisääntyminen aiheuttaa myös odottamattomia markkinahäiriöitä.

Uutta kehystä tarvitaan, jotta

- varmistetaan, että EU:n metsien monikäyttöpotentiaalia hoidetaan kestävästi ja tasapainoisesti, jotta metsiemme elintärkeät ekosysteemipalvelut voivat toimia asianmukaisesti
- tyydytetään uusia tuotteita (esim. vihreitä kemikaaleja tai tekstiilikuituja) ja uusiutuvaa energiaa varten tarvittavien raaka-aineiden kasvava kysyntä. Tämä kysyntä tarjoaa mahdollisuuden monipuolistaa markkinoita, mutta on myös merkittävä haaste kestävälle hoidolle ja vaatimusten tasapainottamiselle. Uusien käyttötarkoitusten kysyntää biotalouden ja bioenergian aloilla olisi koordinoitava perinteisen kysynnän kanssa, ja sen olisi pysyttävä kestävyyden rajoissa
- vastataan metsäteollisuuden haasteisiin ja mahdollisuuksiin, jotka liittyvät resurssi- ja energiatehokkuuteen, raaka-aineisiin, logistiikkaan, rakenteiden mukauttamiseen, innovointiin, koulutukseen ja taitoihin, kansainväliseen kilpailuun, vuoden 2020 jälkeiseen ilmastopolitiikkaan sekä tiedotukseen ja viestintään, kasvun edistämiseksi
- suojellaan metsiä ja biologista monimuotoisuutta myrskyjen ja metsäpalojen huomattavilta vaikutuksilta, vesivarojen jatkuvalta hupenemiselta ja tuholaisilta. Nämä uhat eivät noudata valtioiden rajoja, ja ilmastonmuutos kärjistää niitä
- myönnetään, että EU ei käytä vain omaa tuotantoaan ja että sen kulutuksella on vaikutuksia metsiin kaikkialla maailmassa
- laaditaan asianmukainen tietojärjestelmä kaikkien edellä mainittujen seikkojen seuraamiseksi.

EU tarvitsee poliittisen kehyksen, jolla koordinoidaan metsäalan toimia ja varmistetaan niiden johdonmukaisuus sekä mahdollistetaan yhteisvaikutukset muiden metsänhoitoon vaikuttavien alojen kanssa. Se tarvitsee uuden metsästrategian, joka toimii keskeisenä vertailukohtana metsäalan politiikan kehittämisessä. EU:n metsät ja metsäala on asemoitava siten, että varmistetaan niiden panos EU:n päämäärien ja tavoitteiden hyväksi.

## 3 JATKOTOIMET: UUSI EU:N STRATEGIA METSIEN JA METSÄALAN PUOLESTA

Tällä ehdotuksella edistetään johdonmukaista ja kokonaisvaltaista näkemystä metsänhoidosta, se kattaa metsistä saatavat monenlaiset hyödyt ja siinä yhdistetään sisäiset ja ulkoiset metsäpoliittiset kysymykset sekä käsitellään koko metsäalan arvoketjua.

Siinä määritellään keskeiset periaatteet, joita tarvitaan kestävän metsänhoidon vahvistamiseksi sekä kilpailukyvyn ja työpaikkojen lisäämiseksi erityisesti maaseudulla varmistaen samalla metsien suojelu ja ekosysteemipalvelujen tuottaminen. Siinä täsmennetään myös, miten EU haluaa toteuttaa metsäalan toimia.

Jotta tämä strategia olisi mielekäs niiden toimien kannalta, jotka edellyttävät tai saattavat edellyttää näyttöä kestävästä metsänhoidosta, ja saavuttaisi tavoitteensa, tarvitaan objektiivisia, kunnianhimoisia ja todistettavissa olevia kestävän metsänhoidon kriteerejä, joita voidaan soveltaa kaikkiin metsäbiomassan käyttötarkoituksiin. Tämän strategian ja sen täytäntöönpanon olisi perustuttava voimassa olevaan lainsäädäntöön ja kansainvälisiin aloitteisiin, Forest Europe -prosessissa[8] tehty työ mukaan luettuna, ja siinä olisi otettava huomioon pienmetsänomistajien erityistilanne sekä käsiteltävä markkinalähtöisiä yksityissektorin välineitä, kuten sertifiointia.

Yhteisten tavoitteiden saavuttamiseksi ja johdonmukaisuuden ja yhteisvaikutuksen lisäämiseksi koordinointi jäsenvaltioiden kanssa ja niiden välillä on tärkeää. Jäsenvaltioita pyydetään ottamaan tämän strategian periaatteet ja tavoitteet huomioon laatiessaan ja toteuttaessaan toimintasuunnitelmiaan ja kansallisia metsäohjelmiaan. Olisi kehitettävä verkottumismahdollisuuksia ja keinoja vaihtaa tietoja ja parhaita käytäntöjä.

### 3.1 Pääperiaatteet

- Kestävä metsänhoito ja metsien monikäyttö, joka tuottaa monenlaisia tuotteita ja palveluita tasapainoisella tavalla ja takaa metsien suojelun.
- Resurssitehokkuus, jolla optimoidaan metsien ja metsäalan panos maaseudun kehitykseen, kasvuun ja työpaikkojen luomiseen.
- Maailmanlaajuinen vastuu metsistä, jolla edistetään metsätuotteiden kestävää tuotantoa ja kulutusta.

Euroopalla on pitkät perinteet kestävästä metsänhoidosta, mikä näkyy jäsenvaltioiden toimissa sovelletuissa ja EU:n erityisesti maaseudun kehittämispolitiikalla tukemissa Forest Europe -periaatteissa. Se on dynaaminen käsite, jonka kansainväliset, alueelliset ja paikalliset kerrokset metsänhoitajien on pantava täytäntöön käytännössä.

[8] Yleiseurooppalainen poliittinen prosessi Euroopan metsien kestävän hoidon edistämiseksi.

Forest Europe -prosessin sitoumukset velvoittavat jäsenvaltiot hoitamaan metsiään kestävästi kansallisen metsäpolitiikkansa ja -lainsäädäntönsä mukaisesti. Tätä strategiaa toteuttaessaan niiden olisi kiinnitettävä huomiota kestävän metsänhoidon perustasoihin, parannettava tietojenvaihtoa ja levitettävä hyviä käytäntöjä.
Metsäalalla resurssitehokkuus tarkoittaa metsävarojen käyttöä sellaisella tavalla, jolla minimoidaan ympäristö- ja ilmastovaikutukset, sekä niiden metsien tuotosten asettamista etusijalle, jotka tuottavat enemmän lisäarvoa, luovat enemmän työpaikkoja ja edistävät paremman hiilitasapainon saavuttamista. Puun kaskadikäyttö[9] täyttää nämä kriteerit. Joissain tapauksissa, esimerkiksi kysynnän muuttuessa tai ympäristönsuojelusyistä, saatetaan tarvita erilaisia lähestymistapoja.

## 3.2 Vuoden 2020 metsätavoitteet

Varmistetaan ja osoitetaan, että kaikkia EU:n metsiä hoidetaan kestävän metsänhoidon periaatteiden mukaisesti ja että EU:n panosta kestävän metsänhoidon edistämiseksi ja metsäkadon vähentämiseksi koko maailmassa vahvistetaan, eli:

– edistetään metsien eri toimintojen tasapainottamista, vastataan kysyntään ja tuotetaan elintärkeitä ekosysteemipalveluja;

– tarjotaan metsätaloudelle ja koko metsäalan arvoketjulle perusta, jonka avulla ne voivat edistää kilpailukykyisesti ja kannattavasti biopohjaista taloutta.

Yhdessä jäsenvaltioiden viranomaisten ja sidosryhmien kanssa laadituilla tavoitteilla puututaan kestävän kehityksen kolmeen ulottuvuuteen yhdennetyllä tavalla ja tarjotaan kokonaisvaltainen lähestymistapa metsänhoitoon ja metsäpolitiikkaan.

## 3.3 Kahdeksan toisiinsa liittyvää ensisijaista alaa: arvoa kaikille

***Kestävä metsänhoito edistää tärkeiden yhteiskunnallisten tavoitteiden saavuttamista***

### *3.3.1 Maaseutu- ja kaupunkiyhteisöjen tukeminen*

Yhteiskunnan metsien tarve kasvaa. Metsät peittävät suuria osia maaseutualueista, ja ne ovat myös elintärkeitä maaseudun väestölle, koska ne tukevat taloudellista hyvinvointia ja työllisyyttä.

[9] Kaskadiperiaatteen mukaan puuta käytetään seuraavassa tärkeysjärjestyksessä: puupohjaiset tuotteet, niiden käyttöiän pidentäminen, uudelleenkäyttö, kierrätys, bioenergia ja hävittäminen.

Kestävä, koulutettu ja turvallinen työvoima on yksi nykyistä kilpailukykyisemmän metsäalan pilareista. Hyvin hoidetut metsät ja pätevät metsänhoitajat, työntekijät ja yrittäjät avaavat tietä kestävälle ja kilpailukykyiselle metsäalalle, jolla on merkittävä rooli maaseudun kehityksessä ja koko taloudessa ja joka samalla tuottaa yhteiskunnallista hyötyä.

Komissio katsoo, että maaseudun kehittämisvaroja olisi käytettävä kestävän metsänhoidon täytäntöönpanon tukemiseen. Jäsenvaltioiden olisi hyödynnettävä uudessa maaseudun kehittämisasetuksessa annettuja mahdollisuuksia ja suosittava investointeja, joilla uudenaikaistetaan metsätalouden tekniikkaa, optimoidaan alan biotalouteen antama panos, parannetaan metsäekosysteemien vastustuskykyä, ympäristöarvoa ja ilmastonmuutoksen hillitsemispotentiaalia, sopeudutaan ilmastonmuutokseen, säilytetään geenivaroja, edistetään metsiensuojelua ja tiedotusta sekä luodaan uutta metsämaata ja uusia peltometsätalousjärjestelmiä.

Strategiset suuntaviivat:

– Jäsenvaltioiden olisi hyödynnettävä maaseudun kehittämisvaroja kilpailukyvyn parantamiseen, elinkeinoelämän monipuolistamiseen ja elämänlaadun parantamiseen sekä tiettyjen julkisten ympäristöhyödykkeiden tuottamiseen[10] edistääkseen kestävän metsänhoidon sosiaalisia toimintoja.

– Komission ja jäsenvaltioiden olisi arvioitava maaseudun kehittämispolitiikan mukaisten metsätaloustoimenpiteiden vaikutusta ja parannettava sitä.

– Osana valtiontukien uudistuspaketin yksinkertaistamistavoitetta komissio ehdottaa harkittavaksi, että suuret yritykset sisällytetään ryhmäpoikkeusjärjestelmään, ja se tarkistaa parhaillaan ryhmäpoikkeuksien edellytyksiä metsätalousalalla.[11]

– Jäsenvaltioita kehotetaan tukemaan maaseudun kehittämiseen myönnettävän rahoituksen avulla metsäalan neuvontajärjestelmiä tietoisuuden lisäämiseksi, koulutusta sekä paikallisten metsänomistajien ja viranomaisten välistä viestintää.

– Komission ja jäsenvaltioiden olisi parannettava metsien yhteiskunnalle tuottamien hyötyjen arvostamista ja löydettävä kestävän metsänhoidon avulla oikea tasapaino eri tuotteiden ja palvelujen tuottamisen välillä.

### *3.3.2 EU:n metsäteollisuuden, bioenergia-alan ja laajemman vihreän talouden kilpailukyvyn ja kestävyyden edistäminen*

Puu on luonnollinen, uusiutuva, uudelleen käytettävä ja kierrätettävä raaka-aine. Jos se on peräisin kestävästi hoidetuista metsistä ja jalostetaan ja käytetään tavalla, jolla minimoidaan haitalliset ilmasto- ja ympäristövaikutukset ja samalla tarjotaan ihmisille toimeentulo, sillä voi olla kestävä rooli.

[10] Eurooppa-neuvoston 7.–8.2.2013 antamat päätelmät monivuotisesta rahoituskehyksestä.

[11] Koska metsäala ei kuulu EU:n toiminnasta tehdyn sopimuksen liitteen I ja 42 artiklan soveltamisalaan, EU:n kilpailusääntöjä sovelletaan siihen rajoituksetta.

EU:n metsäteollisuus jalostaa yhteensä 58 prosenttia EU:ssa korjatusta puubiomassasta[12], ja tämä muodostaa noin 7 prosenttia EU:n teollisuuden BKT:stä ja lähes 3,5 miljoonaa työpaikkaa ja edistää EU:n teollisuuspolitiikan tavoitteiden saavuttamista.[13] Sen kilpailukyky tulevaisuudessa edellyttää kuitenkin uusia resurssi- ja energiatehokkaita ja ympäristöystävällisiä prosesseja ja tuotteita. Kehittyneiden puupohjaisten materiaalien ja kemikaalien odotetaan olevan tärkeässä asemassa EU:n biotaloudessa. Eräässä komission yksiköiden valmisteluasiakirjassa kuvaillaan EU:n metsäteollisuuden alasektoreita ja niiden taloudellisia ja teknisiä näkymiä ja määritellään niiden suurimmat haasteet ja korjaavat toimet (2013–2020) niiden maailmanlaajuisen kilpailukyvyn parantamiseksi.

Loput 42 prosenttia käytetään energiantuotantoon, joka muodostaa noin 5 prosenttia EU:n energian kokonaiskulutuksesta. Kansallisten uusiutuvaa energiaa koskevien toimintasuunnitelmien mukaan biomassa on vuonna 2020 yhä tärkein uusiutuvan energian lähde. Komissio arvioi parhaillaan, olisiko ehdotettava lisätoimenpiteitä, kuten yhdenmukaistettuja kestävyyskriteereitä, kiinteän ja kaasumaisen biomassan käyttöön lämmityksessä, jäähdytyksessä ja sähköntuotannossa liittyvien kestävyyskysymysten ratkaisemiseksi.

Näin ollen metsästä saatava biomassa sekä metsän ei-puutuotteet, joita kohtaan kiinnostus markkinoilla lisääntyy, tarjoavat mahdollisuuksia säilyttää tai luoda työpaikkoja ja monipuolistaa tulonlähteitä vähähiilisessä ja vihreässä taloudessa.

Strategiset suuntaviivat:

Komissio aikoo yhdessä jäsenvaltioiden ja sidosryhmien kanssa

– tutkia ja edistää puun täysimääräisempää hyödyntämistä kestävänä, uusiutuvana ja ilmasto- ja ympäristöystävällisenä raaka-aineena metsiä ja niiden ekosysteemipalveluja vahingoittamatta; arvioida materiaalien ja energian korvaamisesta metsien biomassalla ja puunkorjuutuotteilla saatavat ilmastohyödyt sekä metsäbiomassan käytön kannustimien markkinoita vääristävät vaikutukset;

– laatia viimeistään vuoden 2014 lopussa objektiiviset, kunnianhimoiset ja todistettavissa olevat EU:n kestävän metsänhoidon kriteerit, joita voidaan soveltaa erilaisissa poliittisissa yhteyksissä riippumatta metsäbiomassan loppukäytöstä. Komissio tekee ehdotuksia tätä varten tarvittaviksi toimenpiteiksi;

– arvioida mahdollista puuntarjontaa ja helpottaa kestävän puun käytön lisäämistä; laatia hyviä käytäntöjä sisältäviä ohjeita tästä ja ”kaskadikäytöstä” sekä resurssi- ja energiatehokkaista valmistusprosesseista etenkin metsäteollisuutta, pk-yrityksiä ja mikroyrityksiä varten;

[12] Sahatavaran ja puutuotteiden valmistus, huonekalut, massan ja paperin valmistus ja jalostus, painaminen (NACE-koodit 16, 31, 17, 18.1). Tähän sisältyvät myös asiaankuuluvat puunkorjuuta koskevat näkökohdat (NACE-koodi 02.2).

[13] ”Vahvempi eurooppalainen teollisuus talouden kasvua ja elpymistä varten”, (COM(2012) 582 final) ja ”Globalisaation aikakauden yhdennetty teollisuuspolitiikka” (KOM(2010) 614).

– edistää markkinoiden kasvua ja EU:n metsäteollisuuden tuotteiden kansainvälistymistä sekä parantaa muun muassa huonekalujen kestävää rakentamista ja niitä koskevaa kuluttajatiedotusta koskevaa alakohtaista osaamista;

– helpottaa EU:n metsäteollisuuden tuotteiden ja raaka-aineiden pääsyä kolmansien maiden markkinoille kahdenvälisillä kauppasopimuksilla ja parantamalla tiedotusta tuontiedellytyksistä ja raaka-aineiden viennistä;

– tukea metsäteollisuuden teknologiafoorumia ja kannustaa uusia aloitteita, kuten biopohjaisten alojen yksityisen ja julkisen sektorin kumppanuuksia, joilla luodaan erilaisia resurssi- ja energiatehokkaita tuotteita ja prosesseja koskevaa tutkimusta ja innovointia;

– käynnistää vuonna 2014 metsäteollisuuteen vaikuttavan EU:n lainsäädännön kumulatiivisten kustannusten arvioinnin. Sen tuloksia voidaan käyttää laajemmassa vaikutusten analyysissa, johon sisältyvät toimien ja lainsäädännön kustannukset, hyödyt ja johdonmukaisuus.

### *3.3.3 Metsät muuttuvassa ilmastossa*

Metsät ovat haavoittuvia ilmastonmuutokselle. Siksi on tärkeää säilyttää niiden vastustus- ja sopeutumiskyky ja parantaa sitä muun muassa metsäpalojen torjunnan ja muiden sopeuttamisratkaisujen (esim. asianmukaiset lajit, kasvilajikkeet) avulla.

Samalla metsänhoidolla voidaan lievittää ilmastonmuutoksen vaikutuksia säilyttämällä metsien rooli hiilen kiertokulun nieluina tai tehostamalla sitä sekä tuottamalla biomateriaaleja, jotka voivat toimia väliaikaisina hiilivarastoina tai ”hiilen korvikkeina”, joilla korvataan hiili-intensiiviset materiaalit ja polttoaineet. EU hyväksyi äskettäin LULUCF-toimien tilinpitoa, seurantaa ja raportointia koskevat säännöt[14], joiden mukaan jäsenvaltiot toimittavat tietoja esimerkiksi suunnitelmistaan laajentaa nieluja ja vähentää metsiin liittyviä päästöjä. EU ja jäsenvaltiot ovat myös tehneet LULUCF-sektoriin liittyviä sitoumuksia, jotka on täytettävä viimeistään vuonna 2020 Kioton pöytäkirjan toisen velvoitekauden aikana.

Metsät myös lievittävät äärimmäisten sääilmiöiden vaikutuksia lauhentamalla lämpötiloja ja vähentämällä tuulen nopeutta ja veden valumista.

Strategiset suuntaviivat:

Jäsenvaltioiden olisi osoitettava,

– miten ne aikovat lisätä metsiensä ilmastonmuutoksen hillitsemispotentiaalia lisäämällä poistumia ja vähentämällä päästöjä, puun kaskadikäyttö mukaan luettuna, kun otetaan huomioon, että uuden LIFE+-välineen ilmastotoimia ja maaseudun kehittämistä koskevan alaohjelman rahoituksella voidaan edistää ja tukea uusia tai nykyisiä metsänhoitokäytäntöjä, joilla rajoitetaan päästöjä tai lisätään biologista nettotuottavuutta (eli hiilidioksidin poistamista). Niiden olisi tehtävä tämä viimeistään vuoden 2014 puolivälissä LULUCF-toimista toimittamiensa tietojen yhteydessä;

[14] Päätös N:o 529/2013/EU.

– miten ne aikovat lisätä metsiensä mukautumis- ja vastustuskykyä ilmastonmuutokseen sopeutumista koskevassa EU:n strategiassa[15] ja vihreässä kirjassa metsien suojelusta ja metsätiedosta ehdotettujen toimien pohjalta, esimerkiksi korjaamalla tietopuutteita ja sisällyttämällä sopeuttamistoimet kaikkiin metsiä koskeviin toimintalinjoihin.

### *3.3.4 Metsien suojelu ja ekosysteemipalvelujen tehostaminen*

Metsät tuottavat ekosysteemipalveluja, joista maaseutu- ja kaupunkiyhteisöt ovat riippuvaisia, ja niiden biologinen monimuotoisuus on valtava. Metsiin kohdistuvat paineet, kuten elinympäristöjen pirstoutuminen, vieraiden tulokaslajien leviäminen, ilmastonmuutos, veden niukkuus, metsäpalot, myrskyt ja tuholaiset edellyttävät suojelun tehostamista. EU:n säännöt kattavat tiettyjen kasvien, kasvituotteiden ja kasvien terveyden mahdollisesti vaarantavien tavaroiden kuljetukset ja kaupan.

Suojelutoimilla olisi pyrittävä säilyttämään, kohentamaan ja palauttamaan metsäekosysteemien vastustuskykyä ja monikäyttöisyyttä, sillä ne ovat EU:n vihreän infrastruktuurin keskeinen osa, joka tuottaa tärkeitä ympäristöpalveluja sekä raaka-aineita.

Olisi painotettava enemmän metsiin kohdistuvien haittavaikutusten ehkäisemistä pikemmin kuin vahinkojen lievittämistä ja ennallistamista. Jotta metsät kykenevät vastaamaan tuleviin uhkiin ja kehityssuuntauksiin, on lisättävä geneettistä monimuotoisuutta ja suojeltava uhanalaisia geenivaroja.

Sekä luonto että tiettyjen uhkien vaikutukset ovat rajatylittäviä, ja siksi tarvitaan EU:n tason toimia.

Kestävän metsänhoidon periaatteisiin perustuvat metsänhoitosuunnitelmat tai vastaavat välineet ovat keskeisiä välineitä tuotettaessa monia erilaisia tuotteita ja palveluja tasapainoisella tavalla. Metsänhoitosuunnitelmat ovat sekä EU:n vuoteen 2020 ulottuvan luonnon monimuotoisuutta koskevan strategian että EU:n maaseudun kehittämiseen myöntämän rahoituksen ytimessä. Ne sisältyvät strategiaan, jolla edistetään ja tuetaan niiden käyttöä.

Strategiset suuntaviivat:

Jäsenvaltiot

– laativat komission avulla käsitteellisen viitekehyksen ekosysteemipalvelujen arvostamiseksi ja edistävät niiden sisällyttämistä tilinpitojärjestelmiin EU:n ja kansallisella tasolla viimeistään vuonna 2020. Ne hyödyntävät tässä ekosysteemien ja ekosysteemipalvelujen tilan kartoitusta ja arviointia;

– pyrkivät ylläpitämään ja lisäämään metsäpinta-alaa maaperän suojelun sekä veden laadun ja määrän sääntelyn takaamiseksi sisällyttämällä kestäviä metsätalouskäytäntöjä vesipolitiikan puitedirektiivin mukaisten vesipiirien hoitosuunnitelmien toimenpideohjelmiin ja maaseudun kehittämisohjelmiin;

[15] COM(2013) 216.

– pyrkivät parantamaan merkittävästi ja mitattavasti metsäpuulajien ja -luontotyyppien suojelutasoa panemalla EU:n luonnonsuojelulainsäädännön täysimääräisesti täytäntöön ja varmistamalla viimeistään vuonna 2020, että kansalliset metsäsuunnitelmat edistävät Natura 2000 -verkoston asianmukaista hallinnointia. Niissä olisi hyödynnettävä tulevaa Natura 2000 -verkostoa ja metsiä koskevaa opasta;

– panevat täytäntöön luonnon monimuotoisuutta koskevan strategisen suunnitelman vuosiksi 2011−2020 ja saavuttavat sen sisältämät Aichin tavoitteet, jotka on hyväksytty biologista monimuotoisuutta koskevan yleissopimuksen yhteydessä, hyödyntäen tulevaa yhteistä ennallistamisen priorisointikehystä;

– pyrkivät tehostamaan metsägenetiikan suojelua (puulajien monimuotoisuus) sekä lajien ja populaatioiden sisäistä monimuotoisuutta. Komissio voi tukea niitä erityisesti maaseudun kehittämisohjelman avulla.

Komissio

– seuraa jäsenvaltioiden saavuttamaa edistystä metsänhoitosuunnitelmien tai vastaavien välineiden käyttöönotossa sekä luonnon monimuotoisuutta koskevien näkökohtien, myös Natura 2000 -suojelutavoitteiden, sisällyttämisessä niihin;

– pyrkii yhdessä jäsenvaltioiden kanssa vahvistamaan mekanismeja, joilla metsiä suojellaan tuholaisilta, lisäämällä yhteistyötä naapurimaiden kanssa, tutkimustoiminnan lisäämisen sekä kasvinsuojelujärjestelmän meneillään olevan tarkistuksen avulla;

– arvioi vaikutuksia ja harkitsee puisia pakkausmateriaaleja koskevan kasvinsuojelutoimenpiteitä koskevan kansainvälisen standardin nro 15 soveltamista EU:n alueella koskevan velvoitteen mahdollista laajentamista;

– antaa käytettävissään olevia asiaankuuluvia tietoja aavikoitumisen estämiseksi tehdyn Yhdistyneiden kansakuntien yleissopimuksen sopimuspuolille tukeakseen niiden toimintasuunnitelmien täytäntöönpanoa, jotta metsiä ja maaperää suojellaan alueilla, jotka kärsivät pahiten maaperän huonontumisesta ja aavikoitumisesta. Tämä tapahtuu etenkin Euroopan metsätietokeskuksen ja Euroopan maaperän tietokeskuksen avulla.

***Tietopohjan parantaminen***

### *3.3.5 Millaisia metsiä meillä on ja miten ne muuttuvat?*

Metsiä koskevan tietopohjan vahvistaminen on tarpeen, jotta voidaan ymmärtää paremmin metsäalan monitahoisia yhteiskunnallisia ja ympäristöhaasteita. Metsäekosysteemien ja niiden palvelujen tilan kartoitus ja arviointi edellyttää parempia tietoja EU:n metsistä. Asiaankuuluvat muuttujat ja tekijät yhdenmukaistetaan EU:n tasolla kansainvälisten, Euroopan laajuisten ja kansallisten tiedonhankintajärjestelmien välisen yhteistyön ja EU:n haasteiden yksityiskohtaisen analyysin perusteella. EU:n ohjelmat, kuten LIFE+, voivat auttaa saamaan käyttöön tarvittavat resurssit.

Komissio ja jäsenvaltiot ovat kehittäneet metsätietoa koskevan moduulijärjestelmän, ja biomassaa ja biologista monimuotoisuutta koskeva työ on käynnissä.

Strategiset suuntaviivat:

Komissio ja jäsenvaltiot

– perustavat Euroopan metsätietojärjestelmän keräämällä yhdenmukaistettuja Euroopan laajuisia tietoja metsien ja metsävarojen monikäyttöisyydestä ja yhdentämällä erilaisia tietojärjestelmiä (esim. EFFIS[16]) ja tietoalustoja (esim. EFDAC[17]) dynaamiseksi moduulijärjestelmäksi, joka yhdistää tietoja ja malleja sovelluksiksi;

– yhdenmukaistavat EU:n metsätiedot niin, että ne perustuvat ensisijaisesti jäsenvaltioiden EU:n tietoarkkitehtuuria koskevien vaatimusten – esim. INSPIRE[18], SEIS[19] ja Copernicus[20] – mukaisesti keräämiin tietoihin, ja seuraavat kansainvälisiä ja alueellisia prosesseja;

– kehittävät edelleen EU:n metsänviljelyaineistotietokantaa ja liittävät siihen hyperlinkkejä kansallisiin rekistereihin ja karttoihin;

– parantavat, muuttavat vertailukelpoisiksi ja jakavat metsä- ja seurantatietoja hyödyntäen muun muassa EFFISistä, metsien terveyden seurannasta, EU:n metsätilastoinnista ja EFDACista saatuja menestyksekkäitä kokemuksia.

Tiiviissä yhteistyössä sidosryhmien kanssa komissio

– laatii useita moduuleja, jotka koskevat muun muassa metsiä ja metsäpalojen ja tuholaisten kaltaisia luonnollisia häiriötekijöitä, metsiä ja ilmastonmuutosta sekä metsiä ja ekosysteemipalveluja ja jotka voivat edistää EU:n metsätilastointia ja yhdennettyä metsien ympäristö- ja taloustilinpitoa.

### *3.3.6 Uusi ja innovatiivinen metsätalous ja lisäarvotuotteet*

Innovoinnin edistämiseksi koko metsäalalla tarvitaan johdonmukainen ja kunnianhimoinen EU:n metsäalan tutkimusalue. Siinä olisi otettava huomioon metsien erityispiirteet, kuten pitkät aikajänteet.

EU:n tutkimuksen ja kehittämisen puiteohjelmat tukevat metsäalaa Metsäalalla on näkyvämpi asema seitsemännessä tutkimuksen puiteohjelmassa ja Horisontti 2020 -puiteohjelmassa Euroopan biotalousstrategian[21] mukaisesti. Tavoitteena on lisätä alan kestävyyttä ja sen panosta maaseudun talouteen kestävän metsänhoidon avulla, parantaa sen kykyä selviytyä bioottisesta ja abioottisesta stressistä sekä kehittää parempia metsätalouden tuotantojärjestelmiä ja tuotteita.

16 EU:n metsäpalotietojärjestelmä.
17 Euroopan metsätietokeskus.
18 Euroopan yhteisön paikkatietoinfrastruktuuri (INSPIRE).
19 Yhteinen ympäristötietojärjestelmä (Shared Environmental Information System, SEIS).
20 Euroopan komission maanseurantaohjelma.
21 COM(2012) 60.

Strategiset suuntaviivat:

– Komissio auttaa jäsenvaltioita ja sidosryhmiä siirtämään teknistä ja tieteellistä osaamista metsäalan käytäntöihin ja markkinoille erityisesti Horisontti 2020 -puiteohjelman ja maatalouden tuottavuutta ja kestävyyttä koskevan eurooppalaisen innovaatiokumppanuuden avulla ja tukee näin suurempaa lisäarvoa tuottavien uusien tuotteiden kehittämistä.

– Komission ja jäsenvaltioiden olisi tehtävä huippututkimusta ja mallintamisvälineitä koskevaa yhteistyötä tieto- ja osaamispuutteiden korjaamiseksi, jotta voidaan ymmärtää paremmin metsiin liittyvien sosiaalisten, taloudellisten ja ympäristömuutosten monitahoisia kysymyksiä (esim. ympäristöraja-arvojen määrittäminen).

– Maataloustutkimuksen pysyvää komiteaa (SCAR) hyödynnetään tutkimus- ja innovointitoiminnan koordinoinnin tehostamiseksi EU:n, jäsenvaltioiden ja sidosryhmien välillä.

– Komissio varmistaa, että tuloksia ja hyviä käytäntöjä levitetään EU:n metsähallintorakenteiden ja muiden asiaankuuluvien foorumien välityksellä.

***Koordinoinnin ja viestinnän lisääminen***

### *3.3.7 Yhteistyötä metsien hoitamiseksi johdonmukaisesti ja niiden ymmärtämiseksi paremmin*

Metsiin liittyy useita monialaisia poliittisia kysymyksiä, joiden tavoitteet ovat joskus erilaisia. Tästä syystä tarvitaan koordinointia, yhteistyötä ja viestintää, jotta politiikasta saadaan johdonmukaista ja yhdenmukaista.

Jäsenvaltioiden kanssa on keskusteltu useista vaihtoehdoista koordinoinnin ja täytäntöönpanon parantamiseksi, ja yksi vaihtoehto oli kestävää metsänhoitoa koskeva puitedirektiivi. Vapaaehtoisuuteen perustuvaa toimintatapaa pidemmälle menevistä toimista ei kuitenkaan päästy yksimielisyyteen. Joka tapauksessa yhteyksiä metsiin liittyviin toimintalinjoihin on parannettava.

EU:n nykyinen metsähallintorakenne[22] perustuu pysyvään metsäkomiteaan[23] (SFC). SFC:n olisi edelleen toimittava foorumina, jolla keskustellaan kaikista metsiin liittyvistä kysymyksistä ja joka varmistaa metsiin liittyvien toimintalinjojen koordinoinnin ja johdonmukaisuuden. Tarvitaan kuitenkin parannuksia, jotta varmistetaan, että SFC vastaa muiden politiikanalojen antamiin panoksiin. SFC työskenteli metsätalouden ja korkintuotannon neuvoa-antavan ryhmän, luontotyyppikomitean ja Natura 2000 -alueiden hallinnoinnin asiantuntijaryhmän kanssa Natura 2000 -verkostoa ja metsiä koskevan oppaan laatimiseksi – tätä voitaisiin käyttää parhaana käytäntönä. Samoin voitaisiin painottaa nykyistä enemmän SFC:n roolia metsien monikäyttöisyyden säilyttämisessä.

[22] Se on kuvattu komission yksiköiden valmisteluasiakirjassa.

[23] Neuvoston päätös 89/367/ETY.

Metsätalouden ja korkintuotannon neuvoa-antava ryhmä[24] pysyy edelleen tärkeimpänä useiden sidosryhmien välisenä foorumina, jolla keskustellaan metsätalouteen ja kestävään metsänhoitoon liittyvistä kysymyksistä, ja metsäteollisuutta käsittelevä neuvoa-antava komitea[25] säilyy tärkeimpänä teollisuuden arvoketjuja käsittelevänä foorumina.

Näiden kolmen foorumin olisi oltava uuden strategian kehittämisen ja seurannan kulmakiviä.

Viestintä muodostaa alalle erityisen haasteen, koska suuri yleisö ei yleensä ole tietoinen siitä, kuinka tärkeää kestävä metsänhoito on, tai niistä eri tavoista, joilla metsäala edistää vihreää taloutta.

Strategiset suuntaviivat:

– Komissio huolehtii siitä, että pysyvän metsäkomitean työ perustuu muihin metsien ja metsäalan kannalta merkityksellisiin EU:n toimintalinjoihin, ja varmistaa, että EU:n metsiä hoidetaan edelleen monikäyttöisyyden pohjalta.

– Komissio ja jäsenvaltiot tutkivat eri vaihtoehtoja kestävän metsänhoidon, yhdenmukaistettujen metsätietojen ja jäsenvaltioiden kanssa tehtävän ja niiden välisen yhteistyön koordinoimiseksi nykyistä paremmin.

– Komissio perustaa Euroopan metsätoimistojen verkoston (kansalliset metsäinventaarit) laatimaan yhdenmukaistettuja kriteereitä kansallisten metsäinventaarien tiedoille. Täydentävää työtä suunnitellaan tehtäväksi COSTin toimilla ja tutkimushankkeilla.

– Jäsenvaltioiden olisi parannettava metsiä ja puuta koskevaa julkista tiedotusta ja hyödynnettävä SFC:n laatimaa EU:n metsiä koskevaa viestintästrategiaa[26].

– Lisäksi komissio arvioi yleistä käsitystä metsistä (viimeistään vuonna 2015 toteutettavalla Eurobarometri-tutkimuksella).

### *3.3.8 Metsät globaalista näkökulmasta katsottuna*

Yleiseurooppalaisella tasolla painopiste on meneillään olevissa neuvotteluissa metsiä koskevasta oikeudellisesti sitovasta sopimuksesta, joissa EU on keskeinen toimija. Tällä sopimuksella EU pyrkii parantamaan kestävää metsänhoitoa koko alueella. Uusi strategia muodostaa sopivan välineen sopimuksen täytäntöönpanoa varten.

Maailmanlaajuisella tasolla EU on metsäkadon ja metsien tilan heikkenemisen torjunnan eturintamassa. Se edistää kestävää metsänhoitoa keinona suojella biologista monimuotoisuutta, torjua aavikoitumista ja vastata ilmastonmuutokseen sekä varmistaa samalla, että metsäekosysteemit tuottavat tuotteita ja palveluja. Tällä tavoin se edistää kestävää kehitystä ja köyhyyden poistamista. REDD+-mekanismilla, FLEGT-

[24] Komission päätös 2004/391/EY.
[25] Komission päätös 97/837/EY.
[26] http://ec.europa.eu/agriculture/fore/publi/

lupajärjestelmällä[27] ja EU:n puutavara-asetuksella[28] pyritään näihin tavoitteisiin. Viimeistään vuonna 2015 komissio tarkastelee uudelleen EU:n puutavara-asetuksen toimintaa ja tehokkuutta.

Tämän strategian tavoitteena on varmistaa EU:n ja jäsenvaltioiden metsiin liittyviä kysymyksiä koskevien politiikkojen, tavoitteiden ja sitoumusten johdonmukaisuus kansainvälisellä tasolla. Se antaa tukea EU:lle ja jäsenvaltioille muotoilemalla selviä ja johdonmukaisia tavoitteita.

Strategiset suuntaviivat:

Komissio ja jäsenvaltiot

– varmistavat EU:n ja jäsenvaltioiden metsiin liittyviä kysymyksiä koskevien politiikkojen ja sitoumusten johdonmukaisuuden kansainvälisellä tasolla;

– edistävät EU:n kehitysyhteistyön ja ulkoisten toimien yhteydessä kestävää metsänhoitoa koko Euroopassa ja maailmanlaajuisesti sekä metsien roolia siirryttäessä vihreään talouteen;

– varmistavat jatkuvan tuen maailmanlaajuisille toimille laittomien hakkuiden torjumiseksi FLEGT-toimintasuunnitelman avulla;

– tukevat kehitysmaiden pyrkimyksiä parantaa niiden metsiä koskevia toimintalinjoja ja sääntöjä, tehostaa metsähallintoa, arvostaa ja seurata metsäekosysteemejä sekä puuttua metsäkatoa ja metsien tilan heikkenemistä edistäviin tekijöihin REDD+-mekanismin avulla.

Komissio

– arvioi EU:n tuotteiden ja raaka-aineiden kulutuksen ympäristövaikutuksia, jotka todennäköisesti edistävät metsäkatoa ja metsien tilan heikkenemistä EU:n ulkopuolella. Tarvittaessa se harkitsee poliittisia vaihtoehtoja tällaisten vaikutusten rajoittamiseksi, muun muassa metsäkatoa ja metsien tilan heikkenemistä koskevan EU:n toimintasuunnitelman laatimista. Tämä tehdään EU:n seitsemännen ympäristöä koskevan toimintaohjelman mukaisesti.

[27] Asetus (EY) N:o 2173/2005 Euroopan yhteisöön suuntautuvaa puutavaran tuontia koskevan FLEGT-lupajärjestelmän perustamisesta.

[28] Asetus (EU) N:o 995/2010.

## 4 PERIAATTEISTA TOIMINNAKSI: YHTEISTYÖTÄ METSIEN JA METSÄALAN PUOLESTA

Komissio ja jäsenvaltiot varmistavat oman toimivaltansa rajoissa strategian täytäntöönpanon ja seurannan ja kiinnittävät erityistä huomiota sidosryhmien osallistumiseen.

Asettaakseen virstanpylväitä vuoden 2020 metsätavoitteiden saavuttamiseksi ja vastatakseen metsäpolitiikan ja metsiin liittyvien toimintalinjojen toimien strategisiin prioriteetteihin komissio tekee yhteistyötä pysyvän metsäkomitean kanssa yhteyksien vahvistamiseksi asiaan liittyviin EU:n toimintalinjoihin. Se tekee tarvittaessa yhteistyötä myös muiden komiteoiden ja foorumien kanssa. Kun otetaan huomioon, kuinka tärkeää EU:n rahoitus on metsien ja metsäalan kannalta, EU:n tasolla käytävän keskustelun laatua on parannettava.

Lisäksi määritellään muita aloja, joilla jäsenvaltioiden olisi saavutettava lisäedistystä, kuten metsäpalojen ehkäiseminen, tuholaisten ja sairauksien torjunta, kestävällä tavalla tuotetun puun käytön edistäminen sekä alueellinen/alueiden välinen yhteistyö.

Metsät ja metsäala saavat tällä hetkellä huomattavasti EU:n rahoitusta. Maaseudun kehittämisasetuksen mukaiset metsätaloustoimenpiteet ovat strategian resurssien selkäranka (90 prosenttia EU:n metsätalouteen myöntämästä kokonaisrahoituksesta). Päivitettyjen suunnitelmien mukaan Euroopan maaseudun kehittämisen maatalousrahastosta on varattu 5,4 miljardia euroa metsätaloustoimenpiteisiin vuosina 2007–2013. Kaudella 2014–2020 menojen voidaan odottaa pysyvän nykyisen kauden menojen tasolla, joskin tämä riippuu jäsenvaltioiden maaseudun kehittämissuunnitelmista. Menot olisi osoitettava siten, että niillä edistetään tämän strategian tavoitteiden saavuttamista, ja etenkin sen varmistamiseen, että EU:n metsiä todistettavasti hoidetaan kestävän metsänhoidon periaatteiden mukaisesti. LIFE+-ohjelmalla tuetaan luonnonsuojelua, mukautumista ilmastonmuutokseen, tiedotusta ja suojelutarpeita, rakennerahastoista tuetaan koheesiohankkeita ja Horisontti 2020 -puiteohjelmalla tuetaan tutkimus- ja innovaatiotoimia, biopohjaisia teollisuudenaloja koskeva julkisen ja yksityisen sektorin kumppanuus mukaan luettuna. Kehitysyhteistyö- ja ilmastonmuutostoimilla tarjotaan myös rahoitusta kolmansille maille etenkin EU:n kehitysrahastojen, REDD+-mekanismin ja FLEGT-järjestelmän kautta. Järkeistämällä käytettävissä olevien resurssien käyttöä ja parantamalla EU:n ja kansallisen rahoituksen välistä koordinointia voidaan parantaa strategian täytäntöönpanoa.

## 5 PÄÄTELMÄT

Metsiä ja metsäalaa koskeva strategia on tarpeen, koska ei ole olemassa EU:n yhteistä metsäpolitiikkaa tai metsiin liittyvien kysymysten ohjaavaa kehystä. Koska yhä useammat EU:n toimintalinjat asettavat jatkuvasti suurempia vaatimuksia metsille, alakohtaisia politiikkoja on koordinoitava. Samoin tarvitaan yhteisesti sovittua kokonaisvaltaista strategista näkemystä metsäkysymyksistä, jotta niihin liittyvät EU:n toimintalinjat otetaan täysimääräisesti huomioon kansallisissa metsäpolitiikoissa. Näin vahvistetaan metsien ja metsäalan kykyä vastata eri politiikanaloilla tapahtuvaan kehitykseen.

Tämän strategian tavoitteena on asettaa metsät ja metsäala keskeiselle sijalle siirryttäessä kohti vihreää taloutta ja arvottaa ne hyödyt, joita metsät voivat kestävällä tavalla tuottaa, sekä varmistaa samalla niiden suojelu. Tätä varten tarvitaan kaikkien osallistuvien toimijoiden vahvaa sitoutumista ja poliittista tukea.

Viimeistään vuonna 2018 suoritetaan uudelleentarkastelu, jossa arvioidaan strategian täytäntöönpanon edistymistä.

Euroopan parlamenttia ja neuvostoa kehotetaan hyväksymään tämä strategia ja ilmaisemaan näkemyksensä sen täytäntöönpanosta.

EUROPEISKA
KOMMISSIONEN

Bryssel den 20.9.2013
COM(2013) 659 final

# MEDDELANDE FRÅN KOMMISSIONEN TILL EUROPAPARLAMENTET, RÅDET, EUROPEISKA EKONOMISKA OCH SOCIALA KOMMITTÉN OCH REGIONKOMMITTÉN

## En ny EU-skogsstrategi: för skogarna och den skogsbaserade sektorn

{SWD(2013) 342 final}
{SWD(2013) 343 final}

**MEDDELANDE FRÅN KOMMISSIONEN TILL EUROPAPARLAMENTET, RÅDET, EUROPEISKA EKONOMISKA OCH SOCIALA KOMMITTÉN OCH REGIONKOMMITTÉN**

# En ny EU-skogsstrategi: för skogarna och den skogsbaserade sektorn

## 1 EU BEHÖVER SIN SKOG

Skog och annan trädbevuxen mark upptar över 40 % av EU:s landareal, med en stor variation av skogstyper i de olika regionerna. Beskogning och vegetationens naturliga succession har lett till att EU:s skogsareal har ökat med cirka 0,4 % under de senaste årtiondena. Generellt sett fortsätter skogsarealen dock att minska. För närvarande avverkas endast 60–70 % av den årliga tillväxten, vilket innebär att virkesförrådet ökar. Enligt medlemsstaternas prognoser för markanvändning, förändrad markanvändning och skogsbruk (LULUCF) förväntas avverkningen emellertid öka med cirka 30 % till 2020 jämfört med 2010.[1] Cirka 60 % av skogarna ägs av flera miljoner privata ägare[2], och antalet privata ägare kommer att öka eftersom återlämnande av skog till privat ägo fortsätter i några av medlemsstaterna. Återstoden av skogarna tillhör staten och andra offentliga ägare.

Skogen är mångsidig och fyller ekonomiska, sociala och miljömässiga syften. Den tjänar dessutom som livsmiljö för djur och växter, fyller en viktig funktion för att begränsa klimatförändringen och tillhandahåller andra miljötjänster. Nästan en fjärdedel av EU:s skogsareal skyddas genom Natura 2000-nätverket och stora delar av den övriga arealen är hem för arter som är skyddade enligt EU:s naturskyddslagstiftning. Skogen ger också viktiga samhälleliga fördelar, bland annat när det gäller hälsa, rekreation och turism.[3]

Skogen har en stor socioekonomisk betydelse, som dock ofta underskattas. Skogar bidrar dessutom till landsbygdens utveckling och ger cirka tre miljoner arbetstillfällen. Virke är fortfarande den största källan till ekonomiska intäkter från skogen. Strategin omfattar därför även EU:s skogsbaserade näringar, som i sin tur omfattas av EU:s industripolitik. Virke anses också vara en viktig råvarukälla för framväxande biobaserade industrier.

Skogsbiomassa är för närvarande den viktigaste källan till förnybar energi och utgör nu ungefär hälften av EU:s sammanlagda förbrukning av förnybar energi. Enligt de nationella handlingsplanerna för förnybar energi ska biomassa som används för uppvärmning, kylning och el stå för cirka 42 % av målet på 20 % förnybar energi 2020. Om detta mål uppnås skulle den mängd virke som används för energiändamål i EU motsvara dagens sammanlagda

[1] Baserat på EU:s uppskattade referensnivåer för skogsförvaltning som lämnats till UNFCCC CMP.6.

[2] Enligt skogsägarnas uppskattningar, 16 miljoner. Antalet privata skogsägare är högt, men deras andel av skogsmarken är jämförelsevis liten och ofta splittrad.

[3] Se grönboken om skogsskydd och skoglig information i EU (KOM(2010) 66) för närmare uppgifter.

träavverkning. Skogen ger också många andra produkter, såsom kork, tjära, svamp, nötter, vilt och bär.

En hållbar skogsförvaltning är avgörande för att dessa fördelar ska kunna avvägas på lämpligt sätt.

Hållbar skogsförvaltning innebär användning av skogar och skogsmark på ett sätt och i en takt som upprätthåller deras biologiska mångfald, produktionsförmåga, föryngringsförmåga, vitalitet och deras potential att nu och i framtiden fylla relevanta ekologiska, ekonomiska och sociala funktioner på lokal, nationell och global nivå och som inte ger skador på andra ekosystem.[4]

Fördraget om Europeiska unionens funktionssätt (EUF-fördraget) innehåller inga särskilda bestämmelser om en skogspolitik för EU, men EU har genom sin politik sedan lång tid tillbaka bidragit till att genomföra en hållbar skogsförvaltning och till medlemsstaternas beslut om skogar. Europa 2020-strategin för tillväxt och sysselsättning, färdplanen för resurseffektivitet, landsbygdsutvecklingspolitiken, industripolitiken, EU:s klimat- och energipaket med 2020-målen, strategin för växtskydd och växtförökningsmaterial och strategierna för biologisk mångfald och bioekonomi är viktiga milstolpar i utvecklingen på skogsområdet.[5]

Genom EU:s skogsbruksstrategi från 1998[6], som baserades på subsidiaritet och gemensamt ansvar, inrättades en ram för skogsrelaterade åtgärder till stöd för en hållbar skogsförvaltning. Strategin från 1998 bygger på samarbete och positiva kopplingar mellan EU:s och medlemsstaternas politik och initiativ. Handlingsplanen för skog[7] 2007–2011 var ett viktigt instrument för att genomföra strategin och inriktades på fyra mål, nämligen konkurrenskraft, miljö, livskvalitet samt samordning och kommunikation. Medfinansiering av skogsbruksåtgärder enligt förordningen om landsbygdsutveckling har varit den huvudsakliga kanalen för finansiering på EU-nivå och kommer så även att vara i framtiden.

En efterhandsutvärdering av handlingsplanen för skog har visat att det behövs en ny skogsstrategi för att utforma och genomföra en gemensam vision för en mångsidig och hållbar skogsförvaltning i EU. I utvärderingen fastställs prioriterade åtgärder och mål och EU:s och medlemsstaternas finansieringsstrategier och planer sammankopplas, konsekvensen i planeringen av sektorsöverskridande verksamheter, finansiering och genomförande förbättras och tydliga mekanismer för övervakning, utvärdering och bedömning fastställs. Dessutom granskas intressenternas deltagande. Syftet med detta meddelande är att stödja dessa rekommendationer med hjälp av strategiska riktlinjer.

4 Ministerkonferensen om skydd av skogarna i Europa, Helsingfors, 1993.
5 KOM(2011) 244 och COM(2012) 60.
6 Rådets resolution av den 15 december 1998 om en skogsbruksstrategi för Europeiska unionen
7 KOM(2006) 302.

## 2 VARFÖR BEHÖVS EN NY RAM?

Under de senaste 15 åren har stora samhälleliga och politiska förändringar påverkat synen på skogar och skogsbruk i EU:s samhällen. Det allmänna läget kännetecknas av ökande krav på och hot mot skogarna. Samtidigt skapar de alltfler skogsrelaterade åtgärderna en komplex och splittrad situation inom den skogspolitiska sfären. De allt starkare kopplingarna mellan de internationella marknaderna för livsmedel, foder, virke och bränsle orsakar också oväntade störningar på marknaden.

En ny ram krävs av följande skäl:

- Garantera att EU-skogarnas multifunktionella potential förvaltas på ett hållbart och välavvägt sätt så att skogarnas viktiga ekosystemtjänster fungerar på ett korrekt sätt.
- Tillgodose den ökade efterfrågan på råvaror för befintliga och nya produkter (t.ex. miljövänliga kemikalier eller textilfibrer) och förnybar energi. Den ökade efterfrågan ger möjlighet att diversifiera marknaderna, men utgör en stor utmaning för hållbar förvaltning och en lämplig avvägning av efterfrågan. Efterfrågan från nya användningsområden inom bioekonomi och bioenergi bör samordnas med traditionella efterfrågeområden och respektera gränserna för hållbarhet.
- Bemöta de problem och utnyttja de möjligheter som skogsindustrierna står inför när det gäller resurs- och energieffektivitet, råvaror, logistik, strukturell anpassning, innovation, utbildning, praktisk utbildning och kompetenser, internationell konkurrens, klimatpolitiken efter 2020 och information och kommunikation i syfte att stimulera tillväxt.
- Skydda skogen och den biologiska mångfalden mot de allvarliga konsekvenserna av stormar och bränder, allt knappare vattenresurser och skadegörare. Ta hänsyn till att dessa hot sträcker sig över de nationella gränserna och förvärras av klimatförändringen.
- Öka medvetandet om att EU inte bara är beroende av sin egen produktion, och att EU:s förbrukning påverkar skogar i hela världen.
- Utveckla ett lämpligt informationssystem för att följa upp samtliga punkter ovan.

EU behöver en politisk ram för att samordna och skapa enhetlighet i sin skogspolitik och det måste även finnas utrymme för synergier med andra sektorer som påverkar skogsförvaltningen. Den nya skogsstrategin bör fungera som en central referenspunkt i utvecklingen av skogspolitiken. Målet är att ge EU:s skogar och skogssektor en ställning där de kan bidra till EU:s mål.

## 3 VÄGEN FRAMÅT: EN NY EU-STRATEGI FÖR SKOGEN OCH SKOGSSEKTORN

I detta förslag förespråkas en enhetlig helhetssyn på skogsförvaltning som täcker skogens många fördelar. Interna och externa skogspolitiska frågor integreras och hela skogens värdekedja beaktas.

I förslaget anges centrala principer för att stärka en hållbar skogsförvaltning, öka konkurrenskraften och skapa fler arbetstillfällen, särskilt i landsbygdsområden, samtidigt som man ser till att skogen skyddas så att den kan leverera ekosystemtjänster. Här anges också hur EU vill genomföra sin skogsrelaterade politik.

För att strategin ska vara meningsfull för de politiska åtgärder som kräver data om hållbar skogsförvaltning för att uppfylla målen behövs objektiva, långtgående och bevisbara kriterier för hållbar skogsförvaltning som kan tillämpas på alla användningsområden för biomassa från skog. Strategin och dess genomförande bör därför bygga på befintlig lagstiftning och internationella initiativ, bland annat det arbete som utförs inom ramen för Forest Europe,[8] där den särskilda situationen för små skogsägare övervägs och marknadsbaserade verktyg för den privata sektorn behandlas, exempelvis certifiering.

Samordning mellan medlemsstaterna är en viktig förutsättning för att uppnå de gemensamma målen och förbättra konsekvensen och synergierna. Medlemsstaterna uppmanas att överväga principerna och målen för denna strategi när de utformar och genomför sina handlingsplaner och nationella skogsprogram. Möjligheter till nätverksarbete och system för utbyte av information och bästa praxis bör utvecklas.

### 3.1 Vägledande principer

- Hållbar skogsförvaltning och skogarnas multifunktionella roll, tillhandahållande av ett stort antal varor och tjänster på ett välavvägt sätt och säkerställande av skogsskydd.
- Resurseffektivitet, optimering av skogens och skogssektorns bidrag till landsbygdsutveckling, tillväxt och skapande av arbetstillfällen.
- Ett globalt ansvar för skogarna, främjande av hållbar produktion och konsumtion av skogsprodukter.

EU har en lång tradition av hållbar skogsförvaltning, vilket speglas i principerna för Forest Europe. Medlemsstaterna tillämpar dessa principer i sin politik och de stöds av EU, särskilt genom politiken för landsbygdsutveckling. Forest Europe är ett dynamiskt koncept med internationella, regionala och lokala nivåer som ska genomföras av skogsförvaltare ute på fältet.

[8] En alleuropeisk politisk process för hållbar förvaltning av kontinentens skogar.

Medlemsstaterna har ingått bindande åtaganden inom ramen för Forest Europe om att förvalta sina skogar på ett hållbart sätt enligt sin nationella skogspolitik och lagstiftning. När medlemsstaterna genomför denna strategi bör de därför arbeta utifrån referensinformationen för hållbar skogsförvaltning, förbättra informationsutbytet och sprida god praxis.

Inom skogssektorn innebär resurseffektivitet att skogens resurser används på ett sätt som minimerar miljö- och klimatinverkan och att skogsprodukter som har ett större mervärde, skapar fler arbetstillfällen och bidrar till en bättre kolbalans prioriteras. Användning i flera steg av virke[9] uppfyller dessa kriterier. I vissa fall kan det vara nödvändigt att använda olika tillvägagångssätt, till exempel vid föränderlig efterfrågan eller miljöskydd.

## 3.2 Skogsmålen 2020

Säkerställa och visa att alla skogar i EU förvaltas enligt principerna om hållbar skogsförvaltning, och att EU:s bidrag till främjandet av en hållbar skogsförvaltning och en minskning av avskogning på global nivå stärks för att på så vis

– bidra till att balansera olika funktioner hos skogen, tillgodose efterfrågan och tillhandahålla viktiga ekosystemtjänster,

– skapa en grund för skogsbruk och skogens hela värdekedja, så att skogen blir ett konkurrenskraftigt och livskraftigt bidrag till den biobaserade ekonomin.

De tre dimensionerna av hållbar utveckling har integrerats i de mål som har tagits fram tillsammans med medlemsstaternas myndigheter och intressenter, och målen utgör således ett heltäckande synsätt på skogsförvaltning och skogspolitik.

## 3.3 Åtta sammanlänkade prioriterade områden: värde för alla

***Hållbar skogsförvaltning bidrar till viktiga samhällsmål***

### *3.3.1 Stödja våra landsbygdsområden och städer*

Skogen blir allt viktigare för samhället. Stora delar av landsbygden är täckt av skog, och skogen är därför också viktig för landsbygdsbefolkningen eftersom den ger ekonomiskt välstånd och arbetstillfällen.

[9] Enligt kaskadprincipen används virke enligt följande prioritetsordning: träbaserade produkter, förlängning av deras livslängd, återanvändning, återvinning, bioenergi och avyttring.

Långsiktig tillgång till välutbildad arbetskraft som arbetar under säkra förhållanden är en av hörnstenarna i en mer konkurrenskraftig skogsbrukssektor. Välförvaltade skogar med kvalificerade skogsförvaltare, arbetstagare och företagare banar väg för en hållbar och konkurrenskraftig skogssektor som fyller en viktig funktion i landsbygdens utveckling och i hela ekonomin, samtidigt som de ger sociala fördelar.

Kommissionen anser att landsbygdsutvecklingsfonderna bör användas för att stödja genomförandet av en hållbar skogsförvaltning. Medlemsstaterna bör därför utnyttja de möjligheter som ges i den nya förordningen om landsbygdsutveckling och prioritera investeringar som moderniserar skogsbrukstekniker, optimerar sektorns bidrag till bioekonomin, förbättrar skogsekosystemens motståndskraft, miljövärde och klimatbegränsningspotential, uppnår naturskyddsmålen och målen för biologisk mångfald, klimatanpassning, bevarande av genetiska resurser, skogsskydd och skogsinformation samt skapar nya system för skogsmark och skogsjordbruk.

Strategiska riktlinjer:

- Medlemsstaterna bör utnyttja landsbygdsutvecklingsfonderna för att öka konkurrenskraften, främja mångfald i den ekonomiska verksamheten och livskvalitet samt leverera miljömässiga kollektiva nyttigheter[10] i syfte att främja de sociala funktionerna hos en hållbar skogsförvaltning.

- Kommissionen och medlemsstaterna bör bedöma och förbättra effekten av skogsbruksåtgärder inom landsbygdsutvecklingspolitiken.

- Som en del av förenklingsmålet i paketet för modernisering av bestämmelserna om statligt stöd, föreslår kommissionen att man bör överväga att inbegripa stora företag i gruppundantagssystemet, och ser nu över villkoren för gruppundantag inom skogsbrukssektorn.[11]

- Med hjälp av landsbygdsutvecklingsmedlen uppmanas medlemsstaterna att stödja rådgivningssystem på skogsområdet för informationssyften, utbildning och kommunikation mellan lokala skogsägare och myndigheter.

- Kommissionen och medlemsstaterna bör förbättra sin värdering av skogens fördelar för samhället och bör genom en hållbar skogsförvaltning arbeta för att finna rätt balans i tillhandahållandet av de olika varor och tjänster som skogen ger.

### 1.1.1 Främja konkurrenskraft och hållbarhet för EU:s skogsindustrier, bioenergi och den bredare gröna ekonomin

Virke är en naturlig, förnybar, återanvändningsbara och återvinningsbar råvara. Om virke tas ut från hållbart förvaltade skogar och behandlas och används för att minimera negativa klimat- och miljöeffekter samtidigt som den ger försörjning, kan virket bli en hållbar resurs.

[10] Slutsatser från Europeiska rådets möte den 7–8 februari 2013 om den fleråriga budgetramen.

[11] Eftersom skogsbrukssektorn inte omfattas av bilaga I och artikel 42 i EUF-fördraget är alla konkurrensregler fullständigt tillämpliga.

Sammanlagt 58 % av den avverkade biomassan i EU behandlas av EU:s skogsindustrier.[12] Skogsindustrin står för cirka 7 % av tillverkningens andel av BNP i EU och nästan 3,5 miljoner arbetstillfällen, och bidrar till att uppnå målen för EU:s industripolitik.[13] Dess framtida konkurrenskraft kräver emellertid nya resurs- och energieffektiva och miljövänliga processer och produkter. Avancerade träbaserade material och kemikalier förväntas fylla en viktig funktion i EU:s bioekonomi. Kommissionens avdelningar har tagit fram ett arbetsdokument med en beskrivning av näringsgrenarna i EU:s skogsindustri och deras ekonomiska och tekniska utsikter. I arbetsdokumentet anges också de största problemen och de korrigerande åtgärder (2013-2020) som bör vidtas för att förbättra deras globala konkurrenskraft.

Återstoden på 42 % används till energi och står för cirka 5 % av EU:s sammanlagda energiförbrukning. Enligt de nationella handlingsplanerna för förnybar energi kommer biomassa fortfarande vara den största källan till förnybar energi 2020. Kommissionen överväger för närvarande huruvida ytterligare åtgärder, bland annat harmoniserade hållbarhetskriterier, bör föreslås för att hantera hållbarhetsfrågor i samband med användningen av biomassa i fast form och gasform för uppvärmning, kylning och el.

Skogsbiomassa och icke träbaserade skogsprodukter, som vinner allt större marknadsintresse, ger möjligheter att bevara eller skapa arbetstillfällen och diversifiera inkomsterna i en koldioxidsnål grön ekonomi.

Strategiska riktlinjer:

Kommissionen kommer tillsammans med medlemsstaterna och berörda intressenter att vidta följande åtgärder:

- Mer grundligt utforska och främja användningen av virke som en hållbar, förnybar och miljö- och klimatvänlig råvara utan att skada skogarna och deras ekosystemtjänster, bedöma klimatfördelarna med att använda skogsbiomassa och avverkade träprodukter som material- och energiersättning samt hur incitament för användning av skogsbiomassa påverkar uppkomsten av snedvridningar på marknaden.

- Senast i slutet av 2014 utforma objektiva, långtgående och bevisbara EU-kriterier för hållbar skogsförvaltning som kan tillämpas i olika politiska sammanhang, oberoende av slutanvändningen av skogsbiomassa. Lämpliga åtgärder kommer att läggas fram av kommissionen.

- Bedöma potentialen för virkesförsörjning och bidra till ett ökat hållbart virkesutnyttjande, utforma vägledning om god praxis för detta ändamål och för användning av trä i flera steg (”kaskadprincipen”) samt för resurs- och energieffektiva tillverkningsprocesser, särskilt för skogsindustrier, små och medelstora företag och mikroföretag.

[12] Träbearbetning, tillverkning av möbler, massa-, papp- och papperstillverkning, tryckning (Nace-koder 16, 31, 17, 18.1). Relevanta virkesavverkningsaspekter (Nace-kod 02.2) omfattas också.

[13] Meddelandet *En starkare europeisk industri för tillväxt och ekonomisk återhämtning* (COM (2012) 582 final) och meddelandet *En integrerad industripolitik för en globaliserad tid – Med konkurrenskraft och hållbar utveckling i centrum* (KOM (2010) 614).

- Stimulera marknadstillväxt och internationalisering av skogsindustriprodukter från EU och förbättra branschens kunskap, bland annat om hållbart byggande och konsumentinformation om möbler.

- Underlätta tillträdet till tredjemarknader för skogsindustriprodukter och råvaror från EU via bilaterala handelsavtal och genom förbättrad information om importvillkor och råvaruexport.

- Stödja teknikplattformen för skogsindustrin och uppmuntra nya initiativ, bland annat offentlig-privata partnerskap, t.ex. inom den biobaserade sektorn, som främjar forskning om och innovation för flera resurs- och energieffektiva produkter och processer.

- Under 2014 inleda en samlad kostnadsanalys av EU-lagstiftning som berör skogsindustrins värdekedjor. Resultaten kan bidra till en bredare analys av effekterna, bland annat kostnader, fördelar och konsekvens i politik och lagstiftning.

### *3.3.3 Skogen och klimatförändringen*

Skogar är sårbara för klimatförändringar. Det är därför viktigt att upprätthålla och stärka deras motståndskraft och anpassningsförmåga, bland annat genom brandförebyggande och andra anpassningslösningar (t.ex. lämpliga arter, växtsorter etc.).

Samtidigt kan skogsförvaltning bidra till att mildra klimatförändringen om skogarnas funktion som kolsänkor i kolkretsloppet upprätthålls eller stärks och genom att skapa bioråvaror som kan fungera som tillfälliga koldioxidlager eller som ”koldioxidsubstitut” genom att ersätta koldioxidintensiva råvaror och bränslen. EU antog nyligen bokföringsregler och regler för övervakning och rapportering i samband med markanvändning, förändrad markanvändning och skogsbruk[14], enligt vilka medlemsstaterna till exempel ska lämna information om sina planer för att utöka sänkor och minska skogsrelaterade utsläpp. EU och dess medlemsstater har också gjort åtaganden om markanvändning, förändrad markanvändning och skogsbruk som ska vara fullgjorda senast 2020, den andra åtagandeperioden enligt Kyotoprotokollet.

Skogen minskar också följderna av extrema väderhändelser genom att dämpa temperaturerna och minska vindhastigheter och vattenavrinning.

Strategiska riktlinjer:

Medlemsstaterna ska visa

- hur de har för avsikt att öka sina skogars klimatbegränsningspotential genom ökad avverkning och minskade utsläpp, inklusive genom användning av trä i flera steg (”kaskadprincipen”). De kan använda finansiering från det nya Life+-underprogrammet för klimatåtgärder och landsbygdsutveckling för att främja och stödja nya eller befintliga skogsförvaltningsmetoder som bidrar till att begränsa utsläppen eller öka den biologiska nettoproduktionen (dvs. minskad koldioxid). Medlemsstaterna ska ha gjort detta i mitten av 2014 inom ramen för sin information om markanvändning, förändrad markanvändning och skogsbruk.

[14] Beslut nr 529/2013/EU.

- hur de stärker skogarnas anpassningsförmåga och motståndskraft genom att bygga vidare på de åtgärder som föreslås i EU:s klimatanpassningsstrategi[15] och grönboken om skogsskydd och skoglig information, till exempel genom att komma till rätta med kunskapsluckor och integrera anpassningsåtgärderna i sin skogspolitik.

### *3.3.4 Skydda skogen och förbättra ekosystemtjänsterna*

Skogen ger ekosystemtjänster som både landsbygdssamhällen och tätorter är beroende av, och rymmer en enormt stor biologisk mångfald. Skogen utsätts dock för påfrestningar, bland annat av fragmentering av livsmiljöer, spridning av invasiva främmande arter, klimatförändring, vattenbrist, bränder, stormar och skadegörare, och måste därför skyddas bättre. EU-reglerna omfattar omsättning av och handel med vissa växtarter, växtprodukter och objekt som kan hota växthälsan.

Skyddsinsatserna bör syfta till att upprätthålla, öka och återställa motståndskraften hos skogarnas ekosystem och deras mångfunktionella roll som en central hörnsten i EU:s gröna infrastruktur genom att tillhandahålla både miljötjänster och råvaror.

Ökad tonvikt bör också läggas vid förebyggande av negativa effekter på skogar i stället för skadebegränsning och återställande. För att skogarna ska kunna reagera på framtida hot och tendenser måste den genetiska mångfalden breddas och hotade genetiska resurser skyddas.

Både naturen och effekterna av vissa hot är gränsöverskridande, och därför krävs åtgärder på EU-nivå.

Skogsförvaltningsplaner eller motsvarande instrument som grundas på principerna om hållbar skogsförvaltning är viktiga instrument för ett välavvägt tillhandahållande av ett stort antal varor och tjänster. Skogsförvaltningsplanerna står i centrum för både EU:s strategi för biologisk mångfald 2020 och finansieringen av landsbygdsutveckling i EU. Strategin omfattar dessa aspekter och användningen av dessa verktyg främjas och stöds.

Strategiska riktlinjer:

Medlemsstaterna ska vidta följande åtgärder:

- Med kommissionens hjälp utforma en konceptram för värdering av ekosystemtjänster och främja deras integration i räkenskapssystemen på EU-nivå och nationell nivå senast 2020. Arbetet ska bygga på kartläggning och bedömning av ekosystemens och ekosystemtjänsternas tillstånd.

- Upprätthålla och förstärka skogtäckningen för att säkerställa markskydd, vattenkvalitet och mängdreglering genom att integrera praxis för hållbar skogsförvaltning i åtgärdsprogrammen i förvaltningsplanerna för avrinningsdistrikt och i landsbygdsutvecklingsprogrammen.

- Uppnå en betydande och mätbar förbättring när det gäller bevarandestatus för arter och livsmiljöer i skogar genom att genomföra EU:s naturskyddslagstiftning fullt ut och se till att

[15] COM(2013) 216.

de nationella skogsplanerna bidrar till en lämplig förvaltning av Natura 2000-nätverket senast 2020. Detta arbete ska bygga på den kommande vägledningen om Natura 2000 och skogar.

- Genomföra den strategiska planen för biologisk mångfald 2011–2020 och i samband med detta uppnå de så kallade Aichi-målen, som antogs inom ramen för konventionen om biologisk mångfald. Detta arbete ska bygga på den gemensamma ramen för prioritering av återställandeåtgärder.

- Förbättra bevarandet av skogens genetiska resurser (mångfald bland trädarter) och mångfald inom arter och populationer. Kommissionen kan stödja medlemsstaterna i detta arbete, särskilt via programmet för landsbygdsutveckling.

Kommissionen ska vidta följande åtgärder:

- Övervaka medlemsstaternas framsteg med tillämpningen av skogsförvaltningsplaner eller andra motsvarande instrument samt integreringen av aspekter som rör biologisk mångfald i dessa planer, bland annat bevarandemålen i Natura 2000.

- Tillsammans med medlemsstaterna stärka mekanismerna för att skydda skogarna mot skadegörare genom ökat samarbete med grannländer, mer forskning samt genom den pågående översynen av växtskyddssystemet.

- Utvärdera effekterna av dessa åtgärder och överväga en eventuell förlängning av skyldigheten att tillämpa internationell standard för fytosanitära åtgärder nr 15 på träförpackningsmaterial inom EU.

- Lämna relevant information och relevanta uppgifter som den förfogar över till parterna till FN:s konvention om bekämpning av ökenspridning för att stödja genomförandet av parternas handlingsplaner för skydd av skogar och mark i de områden som är mest hotade av markförsämring och ökenspridning. Kommissionen kommer i synnerhet att göra detta via det europeiska skogsdatacentrumet.

***Förbättra kunskapsbasen***

### *3.3.5 Hur ser våra skogar ut och hur förändras de?*

Det är nödvändigt att förbättra kunskaperna om skogen för att bättre förstå de komplexa miljömässiga och samhälleliga utmaningar som skogssektorn står inför. För att det ska vara möjligt att kartlägga och bedöma tillståndet för skogarnas ekosystem och deras tjänster krävs bättre skogsinformation på EU-nivå. Relevanta variabler och parametrar kommer att harmoniseras på EU-nivå baserat på samarbete mellan internationella, EU-omfattande och nationella datainsamlingssystem och en detaljerad analys av de problem som EU står inför på detta område. EU-program som Life+ kan bidra till att mobilisera de resurser kom krävs.

Kommissionen och medlemsstaterna har utvecklat ett modulsystem för skogsinformation, och arbete med biomassa och biologisk mångfald pågår.

Strategiska riktlinjer:

Kommissionen och medlemsstaterna ska vidta följande åtgärder:

- Inrätta ett skogsinformationssystem för Europa genom att samla in harmoniserad EU-omfattande information om skogens och skogsresursernas multifunktionella roll, och genom att integrera ett antal olika informationssystem (t.ex. EFFIS[16]) och dataplattformar (t.ex. EFDAC[17]) i ett dynamiskt modulsystem som kombinerar data och modeller i olika tillämpningar.

- Anpassa EU:s skogsinformation så att den främst grundas på uppgifter som samlas in av medlemsstaterna och koppla detta till EU:s krav på datastruktur, som Inspire,[18] Seis[19] och Copernicus,[20] samt se till att skogsinformationen följer internationella och regionala processer.

- Vidareutveckla EU:s databas över skogars reproduktiva material, med hyperlänkar till nationella register och kartor.

- Förbättra skoglig information och övervakning, göra uppgifterna jämförbara och utbyta sådana uppgifter genom att bygga på framgångsrika erfarenheter som EFFIS, systemet för övervakning av skogarnas tillstånd, EU:s skogsvårdsstatistik och EFDAC.

Kommissionen ska i nära samarbete med intressenterna vidta följande åtgärder:

- Utveckla flera moduler, t.ex. om skogen och naturliga störningar som bränder och skadegörare, skogen och bioekonomin, skogen och klimatförändringen och skogen och dess ekosystemtjänster, som kan bidra till EU:s skogsbruksstatistik och de integrerade miljöräkenskaperna för skogar (IEEA).

### *3.3.6 Nytt och innovativt skogsbruk och mervärdesprodukter*

EU bör inrätta ett enhetligt och långtgående skogsforskningsområde för att stimulera innovation inom skogssektorn. I detta sammanhang är det viktigt att ta hänsyn till skogens särskilda egenskaper, till exempel de långa tidsramarna.

EU stöder skogssektorn genom sitt ramprogram för forskning och utveckling. Större vikt läggs dock vid skogssektorn i sjunde ramprogrammet och Horisont 2020 i linje med EU:s bioekonomistrategi[21]. Målet är att öka sektorns hållbarhet och dess bidrag till landsbygdsekonomin genom hållbar skogsförvaltning, genom att öka sektorns förmåga att bemöta biotiska och abiotiska påfrestningar och genom att utveckla bättre skogsbrukssystem och produkter.

Strategiska riktlinjer:

16 EU:s informationssystem för skogsbränder.
17 Europeiska skogsdatacentrumet.
18 Infrastruktur för rumslig information i gemenskapen (Inspire).
19 Det gemensamma miljöinformationssystemet.
20 Europeiska kommissionens jordövervakningsprogram.
21 COM(2012) 60.

- Kommissionen kommer att hjälpa medlemsstaterna och intressenterna att överföra teknisk och vetenskaplig kunskap till praxis på skogsområdet och till marknaden, särskilt genom Horisont 2020 och Europeiska innovationspartnerskapet för produktivitet och hållbarhet inom jordbruket, som stöder utvecklingen av nya produkter med högre mervärde.

- Kommissionen och medlemsstaterna bör samarbeta om avancerade forsknings- och modellverktyg för att åtgärda data- och kunskapsluckor med målsättningen att förbättra förståelsen av de komplexa frågorna i samband med sociala, ekonomiska och miljömässiga förändringar i skogar (t.ex. fastställa miljötrösklar).

- Ständiga kommittén för jordbruksforskning kommer att användas för att förbättra samordningen av forsknings- och innovationsarbetet mellan EU, medlemsstaterna och intressenterna.

- Kommissionen kommer att se till att resultat och god praxis sprids via EU:s skogsförvaltningsstruktur och andra relevanta forum.

***Främja samordning och kommunikation***

*3.3.7 Samarbete för en konsekvent förvaltning och en förbättrad förståelse för våra skogar*

Skogen omfattas av flera övergripande politikområden, vars mål ibland skiljer sig åt. Samordning, samarbete och kommunikation är därför avgörande för att utforma en sammanhängande och konsekvent politik.

Flera alternativ för att förbättra samordningen och genomförandet diskuterades med medlemsstaterna, bland annat ett ramdirektiv om hållbar skogsförvaltning. Man lyckades dock inte nå samförstånd om att gå längre än frivilliga åtgärder. Kopplingarna med skogspolitiska åtgärder måste i alla händelser förbättras.

EU:s nuvarande skogsförvaltningsstruktur[22] är avhängig av ständiga kommittén för skogsbruk[23] (SFC). Ständiga kommittén för skogsbruk bör förbli diskussionsforumet för alla skogsrelaterade frågor, vilket garanterar samordning och enhetlighet i skogspolitiken. Det krävs dock förbättringar för att se till att kommittén agerar i fråga om bidrag från annan politik. Kommittén arbetade med rådgivande gruppen för skog och kork, kommittén för bevarande av livsmiljöer och expertgruppen för förvaltning av Natura 2000-nätverket för att gemensamt ta fram vägledningen om Natura 2000 och skogar – detta kan användas som bästa praxis. SFC:s roll vad gäller att bidra till att upprätthålla skogarnas mångfunktionella roll kan också betonas mer.

Rådgivande kommittén för skog och kork[24] kommer att förbli det huvudsakliga flerpartsforumet för diskussioner om frågor som rör skog och hållbar skogsförvaltning, och

22 Beskrivs i arbetsdokumentet.
23 Rådets beslut 89/367/EEG.
24 Kommissionens beslut 2004/391/EG.

rådgivande kommittén för skogsbruksbaserade industrier[25] kommer att förbli det främsta diskussionsforumet för frågor som rör industriella värdekedjor.

Dessa tre forum bör utgöra hörnstenarna i utvecklingen och uppföljningen av den nya strategin.

Kommunikation är en särskild utmaning för sektorn, eftersom allmänheten generellt sett inte är medveten om hur betydelsefull en hållbar skogsförvaltning är, eller att skogssektorn bidrar till en miljövänlig ekonomi på flera olika sätt.

Strategiska riktlinjer:

- Kommissionen kommer att se till att arbetet i ständiga kommittén för skogsbruk bygger på annan EU-politik som är relevant för skogarna och skogssektorn, och se till att förvaltningen av EU:s skogar förblir mångfunktionell.

- Kommissionen och medlemsstaterna kommer att gå igenom olika alternativ för att förbättra samordningen av hållbar skogsförvaltning, harmoniserad skoglig information och samarbetet mellan och med medlemsstaterna.

- Kommissionen kommer att inrätta ett nätverk för en europeisk skogsbyrå (nationella skogsinventeringar – NFI) för att utforma harmoniserade kriterier för nationell skogsinventeringsdata. Kompletterande arbete planeras via åtgärder och samarbetsprojekt inom det europeiska samarbetet inom vetenskap och teknik (Cost).

- Medlemsstaterna bör å sin sida förbättra informationen om skog och virke till allmänheten, genom att bygga på EU:s kommunikationsstrategi om skog som tagits fram av SFC[26];

- Kommissionen kommer att göra en närmare kartläggning av allmänhetens uppfattning om skogen (via en Eurobarometerundersökning senast 2015).

### *3.3.8 Skogen ur ett globalt perspektiv*

På EU-nivå ligger fokus på de pågående förhandlingarna om inrättandet av ett rättligt bindande avtal om skogar, med EU som en central aktör. Genom detta avtal vill EU göra skogsförvaltningen mer hållbar i hela regionen. Den nya strategin är ett lämpligt verktyg för att genomföra detta avtal.

På global nivå har EU en ledande roll i insatserna för att bekämpa avskogning och skogsförstörelse. EU främjar hållbar skogsförvaltning som ett sätt att skydda den biologiska mångfalden, bekämpa ökenspridning och bemöta klimatförändringarna, samtidigt som man ser till att skogarnas ekosystem levererar varor och tjänster. På så sätt bidrar EU till en hållbar utveckling och fattigdomsbekämpning. Detta är också målen för Redd+ (minskade utsläpp

[25] Kommissionens beslut 97/837/EG.
[26] http://ec.europa.eu/agriculture/fore/publi/

från avskogning och skogsförstörelse i utvecklingsländerna), Flegt[27] och EU:s timmerförordning[28]. Kommissionen ska senast 2015 bedöma hur funktionell och effektiv EU:s timmerförordning är.

Syftet med denna strategi är att skapa enhetlighet mellan EU:s och medlemsstaternas politik, mål och åtaganden när det gäller skogsfrågor på internationell nivå. Strategin innehåller tydliga och konsekventa mål som stöd för EU och medlemsstaterna.

Strategiska riktlinjer:

Kommissionen och medlemsstaterna ska vidta följande åtgärder:

- Skapa enhetlighet mellan EU:s och medlemsstaternas politik och åtaganden i skogsfrågor på internationell nivå.

- Främja en hållbar skogsförvaltning i Europa och globalt och lyfta fram skogens roll i övergången till en grön ekonomi inom ramen för EU:s utvecklingssamarbete och yttre åtgärder.

- Säkra fortsatt stöd för de globala insatserna att bekämpa olaglig avverkning genom Flegt-handlingsplanen.

- Stödja utvecklingsländerna i deras insatser att förbättra sin skogspolitik och skogslagstiftning, stärka skogsförvaltningen, utvärdera och övervaka skogsekosystem och ta itu med de faktorer som leder till avskogning och skogsförstörelse genom Redd+.

Kommissionen ska vidta följande åtgärder:

- Bedöma miljöpåverkan av EU:s förbrukning av produkter och råvaror som sannolikt kan bidra till avskogning och skogsförstörelse utanför EU. I förekommande fall kommer kommissionen att överväga politiska alternativ för att begränsa sådan påverkan, bland annat genom att utarbeta en EU-handlingsplan om avskogning och skogsförstörelse. Kommissionen kommer att vidta dessa åtgärder inom ramen för sjunde miljöhandlingsprogrammet.

[27] Förordning (EG) nr 2173/2005 om upprättande av ett system med Flegtlicenser för import av timmer till Europeiska gemenskapen.

[28] Förordning (EU) nr 995/2010.

## 4 OMSÄTTA PRINCIPERNA I HANDLING: GEMENSAMMA INSATSER FÖR SKOGEN OCH SKOGSSEKTORN

Kommissionen och medlemsstaterna kommer inom ramen för sina respektive befogenheter att se till att strategin genomförs och följs upp, med särskild tonvikt på deltagande av intressenter.

För att sätta upp milstolpar för att uppfylla skogsmålen 2020 och arbeta med de strategiska prioriterade åtgärderna i skogspolitiken och annan skogsrelaterad politik kommer kommissionen att arbeta med ständiga kommittén för skogsbruk för att förstärka kopplingarna med relaterad EU-politik. Vid behov kommer den även att samarbeta med andra kommittéer och forum. Med tanke på att EU-finansiering är ytterst viktig för skogen och skogssektorn bör diskussionerna på EU-nivå bli effektivare.

Andra områden där medlemsstaterna bör gå längre, till exempel förebyggande av skogsbränder, bekämpning av skadegörare och sjukdomar, främjande av hållbart virke och regionalt/tvärregionalt samarbete, kommer att kartläggas.

Skogen och skogssektorn mottar för närvarande betydande EU-medel. Skogsbruksåtgärder som vidtas inom ramen för förordningen om landsbygdsutveckling utgör grunden för strategins resurser (90 % av EU:s sammanlagda skogsbruksfinansiering). Enligt de uppdaterade planerna har 5,4 miljarder euro från Europeiska jordbruksfonden för landsbygdsutveckling öronmärkts för skogsbruksåtgärder under perioden 2007–2013. Även om det kommer att bero på medlemsstaternas landsbygdsutvecklingsplaner kan en liknande utgiftsnivå som under den löpande perioden förväntas för perioden 2014–2020. Dessa utgifter bör bidra till strategins mål, särskilt insatser för att säkerställa att EU:s skogar förvaltas på ett bevisbart sätt enligt principerna för hållbar skogsförvaltning. Life+ stöder naturbevarandeåtgärder, klimatanpassning och informations- och skyddsbehov, strukturfonderna stöder sammanhållningsprojekt och Horisont 2020 stöder forsknings- och innovationsåtgärder, bland annat offentlig-privata partnerskap om biobaserade industrier. Genom utvecklings- och klimatpolitiken kan också tredjeländer få medel, särskilt genom EU:s utvecklingsfonder, Redd+ och Flegt. Åtgärder för att rationalisera de tillgängliga resurserna och förbättra samordningen mellan EU-finansiering och nationell finansiering kan också bidra till att förbättra genomförandet av strategin.

## 5 SLUTSATSER

En strategi för skogen och skogssektorn är nödvändig eftersom EU inte har någon gemensam skogspolitik eller vägledande ram för skogsrelaterade frågor. Alltfler av EU:s politiska åtgärder leder till att ökade krav ställs på våra skogar, och sektorspolitiken bör därför samordnas. Det behövs också en gemensam heltäckande strategisk vision om skogsfrågor, och för att se till att EU:s politik beaktas fullständigt i den nationella skogspolitiken. Sådana åtgärder kommer att bidra till att förbättra skogens och den skogsbaserade sektorns förmåga att bemöta utvecklingen inom ett antal olika politikområden.

Syftet med denna strategi är följaktligen att placera skogen och skogssektorn i centrum för insatserna för en grön ekonomi och att lyfta fram de produkter som skogen kan leverera på ett hållbart sätt, samtidigt som man ser till att skogen skyddas. För att uppnå dessa mål krävs ett starkt engagemang och politiskt stöd från alla berörda parter.

En översyn kommer att genomföras senast 2018 för att bedöma framstegen med strategins genomförande.

Europaparlamentet och rådet uppmanas att stödja denna strategi och lämna sina synpunkter på dess genomförande.

EUROPEAN
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# COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

## A new EU Forest Strategy: for forests and the forest-based sector

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{SWD(2013) 343 final}

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**A new EU Forest Strategy: for forests and the forest-based sector**

## 1 EUROPE NEEDS ITS FORESTS

Forests and other wooded land cover over 40 % of the EU's land area, with a great diversity of character across regions. Afforestation and natural succession have increased the EU's forest area by around 0.4 % per year over recent decades. Globally, however, forest area continues to decrease. Currently in the EU, only 60-70 % of the annual increment is being cut, therefore the growing stock of wood is rising. However, according to Member States' projections under Land Use, Land-Use Change and Forestry (LULUCF), harvest rates are expected to increase by around 30% by 2020 as compared to 2010.[1] Some 60 % of forests are owned by several millions of private owners,[2] with numbers set to rise as restitution of forest ownership in some Member States continues. The remainder belongs to the state and other public owners.

Forests are multifunctional, serving economic, social and environmental purposes. They offer habitats for animals and plants and play a major role in mitigating climate change and other environmental services. Nearly a quarter of the EU's forest area is protected under Natura 2000, and much of the rest is home to species protected under EU nature legislation. Forests also offer wide societal benefits, including for human health, recreation and tourism.[3]

The socio-economic importance of forests is high, but often underestimated. Forests contribute to rural development and provide around three million jobs. Wood is still the main source of financial revenue from forests. So the strategy also looks at the EU forest-based industries, subject to EU industrial policy. Wood is also considered an important source of raw material for emerging bio-based industries.

Forest biomass is currently the most important source of renewable energy and now accounts for around half of the EU's total renewable energy consumption. According to the National Renewable Energy Action Plans, biomass used for heating, cooling and electricity would supply about 42% of the 20% renewable energy target for 2020. If this is achieved, the amount of wood used for energy purposes in the EU would be equivalent to today's total wood harvest. Forests also provide a large range of other products, such as cork, resins, mushrooms, nuts, game and berries.

Ensuring sustainable forest management is essential if these benefits are to be delivered in a balanced way.

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1 Based on the EU's projected forest management reference levels submitted to UNFCCC CMP.6.

2 16 million, according to owners´ estimates. While the number of private forest owners is rather high, their share of forest land is comparably small and often fragmented.

3 Further details are in the Green Paper on Forest Protection and Information COM(2010) 66.

Sustainable forest management means using forests and forest land in a way, and at a rate, that maintains their biodiversity, productivity, regeneration capacity, vitality and their potential to fulfil, now and in the future, relevant ecological, economic and social functions, at local, national, and global levels, and that does not cause damage to other ecosystems.[4]

While the Treaty on the Functioning the EU makes no reference to specific provisions for an EU forest policy, the EU has a long history of contributing through its policies to implementing sustainable forest management and to Member States' decisions on forests. Important developments include the Europe 2020 strategy for growth and jobs, the Resource Efficiency Roadmap, Rural Development Policy, Industrial Policy, the EU Climate and Energy Package with its 2020 targets, the Plant Health and Reproductive Materials Strategy and the Biodiversity and Bioeconomy Strategies.[5]

Based on subsidiarity and shared responsibility, the 1998 EU Forestry Strategy[6] established a framework for forest-related actions that support sustainable forest management and are based on cooperative, beneficial links between EU and Member State policies and initiatives. The Forest Action Plan[7] 2007-2011 was an important instrument for implementing the strategy and addressed four objectives: competitiveness, environment, quality of life and coordination and communication. Co-financing of forestry measures under the Rural Development Regulation has been and will remain the main means of EU-level funding.

An ex-post evaluation of the Forest Action Plan underlined the need for a new forest strategy that: develops and implements a common vision of multifunctional and sustainable forest management in Europe; defines action priorities and targets; links EU and Member State funding strategies and plans; strengthens coherent cross-sectorial activity planning, funding and implementation; establishes clear mechanisms for monitoring, evaluating and reporting; and revises stakeholder involvement. This Communication supports these recommendations by providing strategic orientations.

## 2 WHY A NEW FRAMEWORK IS NEEDED

Over the last 15 years, significant societal and political changes have influenced the way EU society looks at forests and forestry. The overall situation is characterised by growing demands on and threats to forests. At the same time, the increasing number of forest-related

4 Ministerial Conference on the Protection of Forests in Europe. Helsinki, 1993
5 COM(2011) 244 and COM(2012)60
6 Council Resolution of 15 December 1998 on a forestry strategy for the EU
7 COM(2006) 302

policies creates a complex and fragmented forest-policy environment. The increasing links between international food, feed, fibre and fuel markets are also causing unexpected market disturbances.

A new framework is needed to:

- Ensure that the multifunctional potential of EU forests is managed in a sustainable and balanced way, enabling our forests' vital ecosystem services to function correctly.
- Satisfy the growing demand for raw material for existing and new products (e.g. green chemicals or textile fibres) and for renewable energy. This demand is an opportunity to diversify markets, but poses a significant challenge for sustainable management and for balancing demands. Demand for new uses in the bioeconomy and in bioenergy should be coordinated with traditional demands, and respect sustainable boundaries.
- Respond to the challenges and opportunities that forest-based industries face in resource and energy efficiency, raw materials, logistics, structural adaptation, innovation, education, training and skills, international competition, climate policy beyond 2020 and information and communication, to stimulate growth.
- Protect forests and biodiversity from the significant effects of storms and fires, increasingly scarce water resources, and pests. These threats do not respect national borders and are exacerbated by climate change.
- Acknowledge that the EU does not only rely on its own production, and that its consumption has implications for forests worldwide.
- Develop an adequate information system to follow-up on all of the above.

The EU needs a policy framework that coordinates and ensures coherence of forest-related policies and allows synergies with other sectors that influence forest management. It needs a new forest strategy that is a key reference in forest-related policy development. EU forests and forest sector need to be positioned in a way that ensures their contribution to the EU's objectives and targets.

## 3 THE WAY FORWARD: A NEW EU STRATEGY FOR FORESTS AND THE FOREST-BASED SECTOR

This proposal promotes a coherent, holistic view of forest management, covers the multiple benefits of forests, integrates internal and external forest-policy issues, and addresses the whole forest value-chain.

It identifies the key principles needed to strengthen sustainable forest management and improve competitiveness and job creation, in particular in rural areas, while ensuring forest

protection and delivery of ecosystem services. It also specifies how the EU wishes to implement forest-related policies.

For this strategy to be meaningful to those policies that require or might require evidence of sustainable forest management and to reach its goals, objective, ambitious and demonstrable sustainable forest management criteria that could be applied to all uses of forest biomass are needed. The strategy, and its implementation, should build on existing legislation and international initiatives, including work carried out under FOREST EUROPE,[8] consider the special situation of small forest owners, and address market-based private-sector tools such as certification.

To deliver on common objectives and improve coherence and synergies, coordination with and between Member States is important. Member States are asked to consider the principles and goals of this strategy when setting up and implementing their action plans and national forest programmes. Networking opportunities and ways of exchanging information and best practices should be developed.

### 3.1 Guiding principles

- Sustainable forest management and the multifunctional role of forests, delivering multiple goods and services in a balanced way and ensuring forest protection;
- Resource efficiency, optimising the contribution of forests and the forest sector to rural development, growth and job creation.
- Global forest responsibility, promoting sustainable production and consumption of forest products.

Europe has a long tradition of sustainable forest management, which is reflected in the FOREST EUROPE principles applied by Member States' policies and supported by the EU, in particular through rural development policy. It is a dynamic concept with international, regional and local layers that need to be implemented by forest managers on the ground.

Member States are bound by FOREST EUROPE commitments to manage their forests sustainably, according to their national forest policies and legislation. When implementing this strategy, they should address sustainable forest management baselines, improve information exchange and disseminate good practice.

In the forest sector, resource efficiency means using forest resources in a way that minimises impact on the environment and climate, and prioritising the forest outputs that have higher added-value, create more jobs and contribute to a better carbon balance. The cascade use of

[8] Pan-European political process for the sustainable management of the continent's forests.

wood[9] fulfils these criteria. In some cases, different approaches may be necessary, for example in cases of changing demand or environmental protection.

## 3.2 2020 forest objectives

To ensure and demonstrate that all forests in the EU are managed according to sustainable forest management principles and that the EU's contribution to promoting sustainable forest management and reducing deforestation at global level is strengthened, thus:

- contributing to balancing various forest functions, meeting demands, and delivering vital ecosystem services;

- providing a basis for forestry and the whole forest-based value chain to be competitive and viable contributors to the bio-based economy.

The objectives developed together with Member State authorities and stakeholders address the three dimensions of sustainable development in an integrated way, providing a holistic approach to forest management and policy.

## 3.3 Eight linked priority areas: value for everyone

### *Sustainable forest management contributes to major societal objectives*

#### *3.3.1 Supporting our rural and urban communities*

Society has a growing need for forests. Covering large parts of rural areas, forests are also vital for the rural population because they support economic welfare and jobs.

A sustainable, trained and safe workforce is one of the pillars of a more competitive forest sector. Well-managed forests with qualified forest managers, workers and entrepreneurs pave the way for a sustainable and competitive forest sector that plays an important role in rural development and in the whole economy while providing societal benefits.

The Commission considers that rural development funds should be used to support the implementation of sustainable forest management. Member States should use the opportunities given in the new Rural Development Regulation and prioritise investments in: modernising forestry technologies; optimising the sector's contribution to the bio-economy; improving the resilience, environmental value and mitigation potential of forest ecosystems;

[9] Under the cascade principle, wood is used in the following order of priorities: wood-based products, extending their service life, re-use, recycling, bio-energy and disposal.

achieving nature and biodiversity objectives; adapting to climate change; conserving genetic resources; forest protection and information; and creating new woodland and agro-forestry systems.

Strategic orientations:

- Member States should make use of rural development funds to improve competitiveness, promote the diversification of economic activity and quality-of-life, and deliver specific environmental public goods,[10] to contribute to promoting the social functions of sustainable forest management;

- The Commission and the Member States should assess and improve the effect of forestry measures under rural development policy;

- As part of the simplification objective of the state aid modernisation package, the Commission proposes to consider including large companies in the block exemption system and is revising the conditions for block exemptions in the forestry sector;[11]

- With the help of rural development funding, Member States are encouraged to support: Forest Advisory Systems for awareness-raising; training; and communication between local forest holders and authorities;

- The Commission and the Member States should improve their valuing of the benefits that forests give to society and, through sustainable forest management, should find the right balance between delivering the various goods and services.

### *3.3.2 Fostering the competitiveness and sustainability of the EU's Forest-based Industries, bio-energy and the wider green economy*

Wood is a natural, renewable, reusable and recyclable raw material. If it is sourced from sustainably-managed forests, is processed and used to minimise negative effects on climate and the environment while providing livelihoods, its role can be sustainable.

Overall, 58% of harvested EU wood biomass is processed by EU Forest-based Industries,[12] representing about 7% of EU manufacturing GDP and nearly 3.5 million jobs, and contributing to achieving the goals of EU Industrial Policy.[13] However, its future competitiveness requires new resource- and energy-efficient, and environmentally-sound, processes and products. Advanced wood-based materials and chemicals are expected to play a major role in the EU bio-economy. A Staff Working Document describes the EU Forest-based Industries´ sub-sectors, their economic and technological outlooks, and identifies their major challenges and remedial actions (2013-20) to help improve their global competitiveness.

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10 Conclusions of the European Council of 7-8/2/2013 on the Multiannual Financial Framework.

11 Since the forest sector falls outside of Annex I and Article 42 of the Treaty on the Functioning of the EU, all competition rules fully apply to it.

12 Woodworking, furniture, pulp and paper manufacturing and converting, printing (NACE Ch.s 16, 31, 17, 18.1). Relevant wood harvesting aspects (NACE 02.2) are also covered.

13 "A Stronger European Industry for Growth and Economic Recovery", (COM (2012) 582 final) and "Integrated Industrial Policy for the Globalisation Era" (COM (2010) 614).

The remaining 42% is used for energy, accounting for about 5% of total EU energy consumption. According to the National Renewable Energy Action Plans, biomass will still be the main source of renewable energy in 2020. The Commission is currently assessing whether additional measures, including harmonised sustainability criteria, should be proposed to address sustainability issues related to using solid and gaseous biomass for heating, cooling and electricity.

Thus, forest-based biomass, together with non-wood forest products, which are gaining market interest, provide opportunities to maintain or create jobs and diversify income in a low-carbon, green economy.

Strategic orientations:

The Commission will, together with Member States and stakeholders:

- Explore and promote the use of wood as a sustainable, renewable, climate and environment-friendly raw material more fully without damaging the forests and their ecosystem services; assess the climate benefits of material and energy substitution by forest biomass and harvested wood products and the effect of incentives for using forest biomass in creating market distortions;

- Develop objective, ambitious and demonstrable EU sustainable forest management criteria that can be applied in different policy contexts regardless of the end use of forest biomass, by the end of 2014. Appropriate measures will be presented by the Commission;

- Assess potential wood supply and facilitating increased sustainable wood mobilisation; develop good-practice guidance for this and for the "cascade" principle, as well as on resource- and energy-efficient manufacturing processes, especially for Forest-based Industries, SMEs and micro-firms;

- Stimulate market growth and internationalisation of EU Forest-based Industry products and improve sectorial knowledge, including on sustainable construction and consumer information on furniture;

- Facilitate access to third markets for EU Forest-based Industry products and raw materials via bilateral trade agreements, and by improving information on import conditions and raw material exports;

- Support the Forest-based Sector Technology Platform and encourage new initiatives, such as private-public partnerships, e.g. in the bio-based sector, which foster research and innovation for various resource- and energy-efficient products and processes;

- Launch a cumulative cost assessment of EU legislation affecting Forest-based Industry value chains, in 2014. The results could contribute to a wider analysis of impacts, including costs, benefits, and coherence, of policies and legislation.

### *3.3.3 Forests in a changing climate*

Forests are vulnerable to climate change. It is therefore important to maintain and enhance their resilience and adaptive capacity, including through fire prevention and other adaptive solutions (e.g. appropriate species, plant varieties, etc.).

At the same time, forest management can mitigate climate change if forests' role as sinks in the carbon cycle is maintained or enhanced and by providing bio-materials that can act as temporary carbon stores or as 'carbon substitutes', replacing carbon-intensive materials and fuels. The EU recently adopted rules for accounting, monitoring and reporting on LULUCF[14] under which Member States will, for example, provide information on their plans for enhancing sinks and reducing forest-related emissions. The EU and Member States have also made LULUCF-related commitments to be achieved by 2020, the 2nd Commitment Period under the Kyoto Protocol.

Forests also mitigate the impact of extreme weather events by moderating temperatures, and reducing wind speed and water run-off.

Strategic orientations:

Member States should demonstrate:

- how they intend to increase their forests' mitigation potential through increased removals and reduced emissions, including by cascading use of wood, taking into account that the new LIFE+ subprogram for Climate action and Rural Development funding can promote and support new or existing forest management practices that limit emissions or increase net biological productivity (i.e. $CO_2$ removal). They should do this by mid-2014 and in the context of their information on LULUCF actions;

- how they enhance their forests' adaptive capacities and resilience, building on the actions proposed in the EU Strategy on Adaptation to Climate Change[15] and the Green Paper on Forest Protection and information, such as bridging knowledge gaps and mainstreaming adaptation action in forest policies.

### *3.3.4 Protecting forests and enhancing ecosystem services*

Forests provide ecosystem services on which rural and urban communities depend, and host an enormous variety of biodiversity. Pressures on forests, such as habitat fragmentation, spread of invasive alien species, climate change, water scarcity, fires, storms and pests call for enhanced protection. EU rules cover the movement and trade of certain plants, plant products and objects that can threaten plant health.

Protection efforts should aim to maintain, enhance and restore forest ecosystems' resilience and multi-functionality as a core part of the EU's green infrastructure, providing key environmental services as well as raw materials.

Further emphasis should be put on preventing negative impacts on forests rather than on damage mitigation and restoration. For forests to be able to react to future threats and trends, genetic diversity must be enhanced and endangered genetic resources protected.

[14] Decision No 529/2013/EU.

[15] COM(2013)216.

Both the nature and the effects of certain threats are trans-boundary and therefore action at EU level is needed.

Forest Management Plans (FMPs) or equivalent instruments based on the principles of sustainable forest management are key instruments in delivering multiple goods and services in a balanced way. FMPs are at the core of both the EU 2020 Biodiversity Strategy and EU Rural Development funding. The strategy encompasses them and promotes and supports their use.

Strategic orientations:

Member States:

- will, with the Commission's assistance, develop a conceptual framework for valuing ecosystem services, promoting their integration in accounting systems at EU and national levels by 2020. They will build on the Mapping and Assessment of the state of Ecosystems and of their Services;

- should maintain and enhance forest cover to ensure soil protection, water quality and quantity regulation by integrating sustainable forestry practices in the Programme of Measures of River Basin Management Plans under the Water Framework Directive and in the Rural Development Programmes;

- should achieve a significant and measurable improvement in the conservation status of forest species and habitats by fully implementing EU nature legislation and ensuring that national forest plans contribute to the adequate management of the Natura 2000 network by 2020. They should build on the upcoming guide on Natura 2000 and forests;

- will implement the Strategic Plan for Biodiversity 2011-2020 and reach its Aichi targets adopted in the context of the Convention on Biological Diversity, building on the upcoming common Restoration Prioritisation Framework;

- should strengthen forest genetics conservation (tree species diversity) and diversity within species and within populations. The Commission may support them in particular via the Rural Development Programme.

The Commission:

- will monitor Member States' progress as regards the uptake of forest management plans or equivalent instruments and the integration of biodiversity considerations in them, including Natura 2000 conservation objectives;

- should, together with the Member States, strengthen the mechanisms for protecting forests against pests, building on increased cooperation with neighbouring countries, enhanced research and the ongoing review of the Plant Health Regime;

- will assess the impacts and consider a possible extension of the obligation to apply within the EU the International Standard for Phytosanitary Measures nº 15 on wood packaging materials;

- will provide relevant information and data at its disposal to the Parties to the United Nations Convention to Combat Desertification to support the implementation of their Plans of Action for protecting forests and soil in areas most threatened by land degradation and desertification. It will do this especially through the European Forest Data Centre and the European Soil Data Centre.

## *Improving the knowledge base*

### *3.3.5 What forests do we have and how are they changing?*

Strengthening the forest knowledge base is needed to better understand the complex environmental and societal challenges facing the forest sector. Mapping and assessing the state of forest ecosystems and their services requires better EU forest information. Relevant variables and parameters will be harmonised at EU level, based on cooperation between international, pan-European and national data acquisition systems, and on a detailed analysis of EU challenges. EU programmes such as LIFE+ could help mobilise the resources needed.

The Commission and Member States have developed a modular system for forest information, and work on biomass and biodiversity is ongoing.

Strategic orientations:

The Commission and the Member States will:

- set up of the Forest Information System of Europe by collecting harmonised Europe-wide information on the multifunctional role of forests and forest resources and integrating diverse information systems (e.g. EFFIS[16]) and data platforms (e.g. EFDAC[17]) into a dynamic modular system that combines data and models into applications;

- align EU forest information so that it is primarily based on data collected by Member States with EU data architecture requirements such as INSPIRE,[18] SEIS[19] and Copernicus,[20] and follow international and regional processes;

- promote the further development of the EU database of forest reproductive material, including hyperlinks to national registers and maps;

- improve, make comparable and share forest information and monitoring, building on successful experiences such as EFFIS, forest health, EU forestry statistics and the EFDAC.

In close consultation with stakeholders, the Commission will:

- develop several modules, e.g. on forests and natural disturbances like fires and pests, forest and the bio–economy, forests and climate change and forest and ecosystem services that could contribute to the EU's forestry statistics and Integrated Environmental and Economic Accounting for Forests.

16 EU Forest Fire Information System
17 European Forest Data Centre
18 Infrastructure for Spatial Information in the European Community (INSPIRE).
19 Shared Environmental Information System.
20 European Commission's Earth Observation Programme.

### *3.3.6 New and innovative forestry and added-value products*

A coherent and ambitious EU forest-based research area is required to stimulate innovation across the forest sector. It should take into account forest specificities such as long timeframes.

EU framework programmes for research and development support the forest sector. The forest sector is more present in the 7th Research Framework Programme and in Horizon 2020, in line with the Bioeconomy Strategy for Europe[21]. The goal is to enhance the sector's sustainability and its contribution to the rural economy through sustainable forest management, improve its capacity to face biotic and abiotic stresses, and develop better forestry production systems and products.

Strategic orientations:

- The Commission will assist Member States and stakeholders in transferring technological and scientific knowledge to forest practice and the market, in particular through Horizon 2020 and the European Innovation Partnership on Agricultural Productivity and Sustainability, supporting the development of new products with higher added-value;

- The Commission and the Member States should cooperate on advanced research and modelling tools to fill data and knowledge gaps to better understand the complex issues around social, economic and environmental changes related to forests (e.g. identifying environmental thresholds);

- The Standing Committee on Agricultural Research (SCAR) will be used to strengthen coordination of research and innovation work between the EU, Member States and stakeholders;

- The Commission will ensure that results and good practices are disseminated through the EU forest governance structure and other relevant fora.

## ***Fostering coordination and communication***

### *3.3.7 Working together to coherently manage and better understand our forests*

Various crosscutting policy issues address forests, and their objectives sometimes differ. Coordination, cooperation and communication are therefore essential to achieving policy coherence and consistency.

Various options to improve coordination and implementation were discussed with Member States, including a framework directive on sustainable forest management. However, no consensus on going beyond a voluntary approach was found. In any case, links with forest-related policies must be improved.

[21] COM (2012) 60

The current EU forest governance structure[22] relies on the Standing Forestry Committee[23] (SFC). The SFC should remain the forum for discussing all forest-related issues, ensuring coordination and coherence of forest-related policies. However, improvements are needed to ensure that the SFC responds to inputs from other policies. The SFC worked with the Advisory Group on Forestry and Cork, the Habitat Committee and the Expert Group on Natura 2000 management to jointly prepare the guide on Natura 2000 and forests – this could be used as best practice. Also, more emphasis could be put on the SFC's role of keeping forests multi-functional.

The Advisory Committee on Forestry and Cork[24] will remain the main multi-stakeholder platform for discussing issues related to forestry and sustainable forest management, and the Advisory Committee on Forest-based Industries[25] will remain the main platform for issues related to industrial value chains.

These three fora should be the cornerstones for developing and following up on the new strategy.

Communication is a particular challenge for the sector, as the public is generally not aware of how significant sustainable forest management is, or of the various ways in which the forest sector contributes to the green economy.

Strategic orientations:

- The Commission will ensure that the Standing Forestry Committee's work builds on other EU policies relevant for forests and the forest sector, ensuring that managing EU forests remains multifunctional;

- The Commission and the Member States will explore various options for better coordination of sustainable forest management, harmonised forest information and cooperation between and with Member States;

- The Commission will create a European Forest Bureau Network (National Forest Inventories – NFI) to develop harmonised criteria for NFI data. Complementary work is planned through COST actions and research projects;

- Member States should improve public information about forests and wood, and build on the EU Forest Communication Strategy developed by the SFC[26];

- The Commission will further assess public perception of forests (via a Eurobarometer survey by 2015).

22 Described in the Staff Working Document
23 Council Decision 89/367/EEC
24 Commission Decision 2004/391/EC
25 Commission Decision 97/837/EC
26 http://ec.europa.eu/agriculture/fore/publi/

### *3.3.8 Forests from a global perspective*

At pan-European level, the focus is on the ongoing negotiations on establishing a legally-binding agreement on forests, with the EU as a key actor. Through this agreement, the EU aims to improve sustainable forest management across the region. The new strategy forms a suitable vehicle for the implementation of the agreement..

At global level, the EU is at the frontline of work on combating deforestation and forest degradation. It promotes sustainable forest management as a way of protecting biodiversity, fighting desertification and responding to climate change, whilst ensuring that forest ecosystems deliver goods and services. In this way it contributes to sustainable development and to eradicating poverty. REDD+, FLEGT[27] and the EU Timber Regulation[28] aim towards these goals. By 2015, the Commission will review the functioning and effectiveness of the EU Timber Regulation.

This strategy aims to ensure consistency between EU and Member State policies, objectives and commitments on forest-related issues at international level. It supports the EU and Member States by formulating clear and coherent objectives.

Strategic orientations:

The Commission and the Member States will:

- ensure consistency between EU and Member State policies and commitments on forest-related issues at international level;

- promote sustainable forest management across Europe and globally, and the role of forests in the transition to a green economy in the context of EU development cooperation and external action;

- ensure continued support for global efforts to fight illegal logging through the FLEGT Action Plan;

- support developing countries in their efforts to improve forest policies and regulations, strengthen forest governance, value and monitor forest ecosystems, and address the drivers of deforestation and forest degradation through REDD+.

The Commission will:

- assess the environmental impact of EU consumption of products and raw materials likely to contribute to deforestation and forest degradation outside the EU. If appropriate, it will consider policy options for limiting such impacts, including the development of an EU action plan on deforestation and forest degradation. It will do this in line with the 7th EU Environment Action Programme.

[27] Regulation 2173/2005 on the establishment of a forest law-enforcement, governance and trade-licensing scheme for importing timber into the EU.

[28] Regulation (EU) No 995/2010

## 4 TURNING PRINCIPLES INTO ACTION: WORKING TOGETHER FOR OUR FORESTS AND FOREST SECTOR

The Commission and Member States, within their respective competences, will ensure the strategy's implementation and follow-up, paying particular attention to stakeholder involvement.

In order to set milestones for meeting the 2020 forest objectives and to address the strategic priorities of actions in forest policy and forest-related policies, the Commission will work with the Standing Forestry Committee to reinforce links with related EU policies. When necessary, it will work with other committees and fora. Given how important EU funds are for forests and the forest sector, there is a need to improve the quality of EU-level discussions.

Other areas in which Member States should advance further, such as preventing forest fires, combating pests and diseases, promoting sustainable wood and regional/cross-regional cooperation, will be identified.

Forests and the forest sector currently receive significant EU funding. Forestry measures under the Rural Development Regulation are the strategy's resource backbone (90% of total EU forestry funding). According to the updated plans, €5.4 billion from the European Agricultural Fund for Rural Development have been earmarked for forestry measures in 2007-2013. Although it will depend on Member States' Rural Development Plans, a similar level of spending to that in the current period could be expected for 2014-2020. This spending should be dedicated to contributing to the objectives of this strategy, and in particular to ensuring that EU forests are demonstrably managed according to sustainable forest management principles. LIFE+ supports nature conservation, climate change adaptation, information and protection needs, the structural funds support cohesion projects and Horizon 2020 supports research and innovation actions, including the public-private partnership on bio-based industries. Development and climate change policies also provide financing for third countries, in particular through EU development funds, REDD+ and FLEGT. Rationalising available resources and improving coordination between EU and national funding can contribute to the strategy's better implementation.

## 5 CONCLUSIONS

A strategy for forests and the forest sector is necessary since there is no common EU forest policy or guiding framework for forest-related issues. Since a growing number of EU policies are making increasing demands on forests, there is a need to coordinate sectorial policies. There is also a need for an agreed holistic strategic vision on forest issues, and for ensuring that linked EU policies are fully taken into account in national forest policies. This will strengthen the capacity of forests and the forest-based sector to respond to developments in various policy areas.

This strategy aims to put forests and the forest sector at the heart of the path towards a green economy and to value the benefits that forests can sustainably deliver, while ensuring their protection. Strong commitment and political support from all parties involved are needed for this.

A review will be carried out by 2018 to assess progress in implementing the strategy.

The European Parliament and the Council are invited to endorse this strategy and to express their views on its implementation.

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**COMMISSION STAFF WORKING DOCUMENT**
***Accompanying the document***

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

# A new EU Forest Strategy: for forests and the forest-based sector

{COM(2013) 659 final}
{SWD(2013) 343 final}

# Contents

## 1. PROCESS: CONSULTATION AND EXPERTISE

### 1.1. Background

The EU Forestry Strategy[1] was adopted in 1998, following a Resolution of the European Parliament calling for the Commission to put forward a proposal for such a strategy and a Communication from the Commission[2] which highlighted the challenges facing the EU forests, the policy and legal framework for forests and forestry in the EU as well as common objectives and guiding principles for the roles of the EU and the Member States in forest policy.

The Forestry Strategy has served as a reference document for i.e. forestry measures in Rural Development and as a basis for the EU Forest Action Plan.

The Forestry Strategy is related to several EU policies and objectives, in particular: agriculture and rural development, environment, climate change, biodiversity, plant health, research and innovation, trade, industry and energy.

In 2005 the Commission adopted a report on the implementation of the EU Forestry Strategy[3], concluding that the basic principles and elements identified in the EU Forestry Strategy of 1998 were still valid. However, it also observed a need for a more coherent and pro-active approach to forest policy at EU level. Therefore the Commission presented an EU Forest Action Plan in 2006[4].

The EU Forest Action Plan (FAP) was based on the principles and elements identified in the Forestry Strategy for the EU, and it covered four objectives:

(1) Improve the long-term competitiveness,

(2) Improve and protect the environment,

(3) Contribute to the quality of life, and

(4) Foster coordination and communication between Community actions as well as between Community actions and the forest policies of the Member States.

The Action Plan provided a framework for the implementation of forest-related actions at Community and Member State level, and it served as an instrument for coordination between different Community actions as well as between Community actions and forest policies of the Member States. The aim was to support and enhance sustainable forest management (SFM) and the multifunctional role of forests. The Leading Actors responsible for implementing the plan in 2007-2011 were consequently the Commission and the Member States. As a follow up of the Forest

[1] Council Resolution 1999/C 56/01
[2] Communication from the Commission to the Council and to the European Parliament on a Forestry Strategy for the EU COM(1998)649
[3] COM(2005)84
[4] COM(2006)302 final

Action Plan, the Commission committed to publish a report about its implementation in 2012.

In 2010 the Commission adopted a Green Paper on Forest Protection and Information - Preparing forests for climate change[5] which set out options for a European Union approach to the protection of forests and to information about forest resources and their condition. The purpose of the Green Paper was to encourage an EU-wide public debate and to secure views on the future of forest protection and information policy, as well as to provide elements for a possible update of the EU Forestry Strategy on climate related aspects.

The new Forest Strategy is also linked with international forest discussions and, in particular, with the Legally Binding Agreement on forests for which negotiations have been opened in July 2011.

The need to review the 1998 Strategy has been stated in a number of contexts; such as the Council Conclusion on an EU Forest Action Plan[6] that considers necessary an update of the Forestry Strategy to ensure greater coherence of forest-related policies and to reflect the changes in the global, regional and national policy context; the White paper on adaptation to climate change[7] that recommended updating it on climate-related aspects; and the Green Paper on forest protection and information which aimed to provide elements for a possible update of the EU Forestry Strategy on climate related aspects. The Resolution from the European Parliament about the strategy calls for strengthening it with a view to improving sustainable forest management and conservation, and the recommendations of the mid-term and the ex-post evaluation of the EU Forest Action Plan[8] also mentions the need for updating the strategy. The review process was welcomed in the Council Conclusions on the EU Biodiversity Strategy to 2020[9] and supported by both the Standing Forestry Committee and the Advisory Committee on Forestry and Cork.

In April 2011 the Commission launched the review process of the 1998 Forestry Strategy. The main inputs being considered are the consultation process with Member States and stakeholders including two ad-hoc Working Groups to the Standing Forestry Committee and two workshops with Member States and stakeholders, and the evaluation of the Forest Action Plan carried out by external consultants.

## 1.2. Evaluation of the Forest Action Plan (FAP)

A mid-term evaluation of the EU Forest Action Plan was conducted in 2009[10] and an ex-post Evaluation was concluded in November 2012[11]. These two evaluations are

[5] COM(2010)66 FINAL
[6] Council Conclusions on an EU Forest Action Plan, 2662nd Council meeting AGRICULTURE AND FISHERIES - Brussels, 30 and 31 May 2005
[7] White Paper Adapting to climate change: Towards a European framework for action COM(2009) 147 final
[8] Available at: http://ec.europa.eu/agriculture/fore/publi/index_en.htm
[9] Environment Council Conclusions of 19 December 2011
[10] Available at: http://ec.europa.eu/agriculture/eval/reports/euforest/
[11] Available at: http://ec.europa.eu/agriculture/evaluation/market-and-income-reports/forest-action-plan-2012_en.htm

important inputs for the 1998 Forestry Strategy review and have been taken into account for the new Strategy.

The mid-term evaluation concluded that the implementation of the plan was on track but that its effectiveness in influencing action in the Member States should be analysed at a later stage as the effects of the EU FAP on its specific goals (the four objectives above) cannot be expected to show up after only two years of implementation.

For the period post 2011, the evaluation raises the following aspects for consideration:

- more holistic approach to forest sector issues, making it more interrelated with parallel sectors and with environmental, economic and social policies;
- integration of the international forestry issues into the EU forestry action;
- higher profile of the EU in international forest-related processes;
- strengthening the science-policy-practice triangle by better coordination of scientific work and utilisation of financial resources (FP7, COST, national);
- preparation of post-2013 financial instruments.

The mid-term evaluation was an important input for the ex-post evaluation.

The ex-post evaluation was based on extensive document reviews, questionnaire surveys and interviews of the Member States, Commission and stakeholder representatives. The evaluation was carried out by an external evaluation team between November 2011 and March 2012. Conclusions were based on the qualitative analysis and the evaluation team's expert opinion. The work was guided by a Steering Group composed of Commission representatives from nine different services and was structured under five Evaluation Questions that were formulated for the evaluation:

***1. To what extent have the activities in the framework of the EU FAP been effective and efficient?***

According to the results, the implementation of the EU Forest Action Plan was effective and efficient in the manner that the Action Plan has been largely implemented as defined in its work programme 2007-2011.

Implementation made use of, for example, studies to investigate forestry related issues, and Standing Forestry Committee ad hoc Working Groups to gather technical expertise on specific topics. Member State joint statements were defined as Standing Forestry Committee opinions on e.g. forest research, forestry measures in rural development, non-wood goods and services, wood mobilisation, and climate change and forestry. Objective 1 improving the long-term competitiveness of forestry contributed to improved understanding on effects of globalisation on forestry; valuation and marketing of non-wood forest goods and services, and; wood mobilisation for energy generation. There was a positive impact on research and technological development and forestry measures in rural development. Objective 2 enhancing and protecting the environment contributed to improved information on climate change and forestry (including EU and international commitments) and information sharing on biodiversity targets. There were steps taken towards a European forest monitoring system, although the future depends on continued funding

and voluntary co-operation by Member States. Objective 3 contributing to the quality of life shared information between the Member States on environmental education and information; protective functions of forests; and the potential of urban and peri-urban forests. There is impact on integrating forest protective functions in risk management and prevention initiatives in the EU. Objective 4 fostering coordination and communication strengthened the structure and mechanisms for implementation of the Action Plan, and contributed to investigations on public procurement of wood and wood products as well as on EU forest communication strategy. Impact on international processes was weak, but the Action Plan was a positive means to build synergies with the FOREST EUROPE process.
There were no specific resources earmarked for the EU FAP, but implementation was based on existing resources e.g. Rural Development Programmes in the Member States and other EU and national funding. Some activities found their role more naturally at EU level (Objective 1 on economic aspects, Objective 2 on environmental aspects, and Objective 4 on coordination and communication), whereas other activities were mainly implemented at national or even local levels (Objective 3 on socio-cultural aspects, but also e.g. forest owner cooperation and forest sector visibility events). Although the EU FAP resulted in several concrete outputs, such as reports, studies, working groups and recommendations, the uptake at Member State and Community levels remains weak. Furthermore, activities at national (and regional) level are not reported as contribution to the EU FAP goals, and the EU added value remains often unattained.

***2. To what extent have the activities in the framework of the EU Forest Action Plan contributed to the improvement of coherence and cross-sectoral co-operation in implementing the EU Forestry Strategy?***

The EU Forest Action Plan has been helpful for information exchange within the Commission, between Member States and between the Commission and Member States. However, due to its character as a voluntary instrument, improvement in cooperation and coordination depends on the commitment of the Commission Services and the Member States. The EU Forest Action Plan enabled information sharing and provided an agenda for raising awareness and understanding about forest-related issues across policy areas (e.g. rural development, research and development, climate action, risk management and prevention). Although in the beginning of the EU Forest Action Plan implementation there were expectations of a more proactive and holistic approach to forestry-related issues in the EU, the Action Plan has only been able to react to ongoing developments in other policy areas, e.g. in energy and renewable energy fields. An impact can, however, be found in terms of the Seventh Framework Programme implementation for forest and forest-based sector research, and on the definition of forestry measures in the preparation of the proposed new rural development regulation. The influence of the EU Forest Action Plan on national forest programmes varies between the Member States. Most countries replied that their national forest programme considered the EU FAP to some extent, and that the Action Plan was an additional driver in other national policies, such as in the rural development programmes, in bio-energy strategies or in public procurement guidelines. The steps towards a coherent and consistent forest monitoring for the EU27 still requires political commitment and resources.

***3. To what extent have the activities in the framework of the EU Forest Action Plan contributed to balancing economic, environmental and socio-cultural objectives related to forestry?***

The EU Forest Action Plan addressed the three dimensions of sustainable development through Objectives 1 to 3. Objective 4 on coordination and communication was important in terms of enabling a balanced view on Sustainable Forest Management, but implementation of specific actions (e.g. on promotion of forest biomass for energy generation, or actions on biodiversity or valuation and compensation mechanisms for non-wood forest goods and services), the potential was hardly used to develop an integrated approach to sustainability. The three sustainable development dimensions remained largely separated from each other. The socio-cultural objective activities were carried out at Member State level, but they were hardly reported on or coordinated through the Action Plan at EU level. The EU Forest Action Plan was not actively utilised as a framework to define an EU level vision and priorities overarching the national and sectoral definitions of multifunctionality and Sustainable Forest Management. The Action Plan implementation furthermore did not fully utilise support measures for forestry, such as education and advice, with the potential to build capacities for the whole sector to address new challenges and new societal demands.

***4. To what extent did the EU Forest Action Plan have an added value in implementing the EU Forestry Strategy?***

The EU Forest Action Plan covered the principles defined in the EU Forestry Strategy and provided an added value by operationalising them in the Key Actions and activities. The Action Plan did influence several processes both at Member States and Community level. The main achievements and added value in implementing the Forestry Strategy goals refer to a better visibility of the forest sector at EU level, facilitation for improving coherence and coordination of activities between different Community actions and for improving coordination of activities between the Commission and Member States. It is nonetheless difficult to point out the causal links of the Action Plan implementation and specific effects, because several processes are ongoing in parallel and interlinked with impact on forestry in the EU. Developments in parallel sectors and policy fields (e.g. climate action, energy, industry) have generated an increased interest in forests, and the EU Forest Action Plan was a means to address these developments and keep the forestry-specific issues on the agenda. Thus, without the EU Forest Action Plan, the responses of the forestry sector would most likely have been more sporadic. The achievement of the goals will however, dependent on the commitment of the Commission and Member States to put the Action Plan results into use also after concluding the implementation in 2011.

***5. Are the current objectives, key actions and activities of the EU Forest Action Plan still relevant in tackling the needs the Plan was intended to address? To what extent is the organisational set-up of the EU Forest Action Plan as a whole adequate for its purpose?***

International policy developments have caused and are causing shifts in priorities which were not foreseeable to a full extent when preparing the Action Plan. The processes in, for instance, climate change action and renewable energy policy targets, as well as the aspirations expressed in the new biodiversity targets and the bioeconomy strategy, present the forest sector with possibilities but also challenges. To a certain extent, the EU Forest Action Plan responded to these changing needs, but it was not able to build capacities for a dialogue at multiple levels (EU, national, regional or local) or to develop a common response to these policy developments.
The organisational set-up based on the existing structures (Standing Forestry Committee, Advisory Group on Forestry and Cork, Interservices group on Forestry) was largely purposeful for the EU Forest Action Plan implementation – taking into account that the Action Plan was a voluntary instrument – these structures provided an opportunity for Member States to share information and experiences. A more structured coordination would have required a clearer vision, target-setting and high-level political commitment to the goals defined.

In the process of defining the follow-up after the EU Forest Action Plan, the viewpoints of the Member States, Commission and stakeholders are valuable. It is important that the debate about the follow-up reaches beyond the mere Action Plan implementation in the forestry sector, and includes beneficiaries of the intended measures at large. Bringing the achievements as well as the challenges ahead for forestry in Europe to an EU forum would help in understanding the complexity of issues at stake, but also in setting a target for the long-term sustainability of the EU forests that we want to pass on to future generations.

### *1.2.1. Conclusions and key recommendations*

The ex-post evaluation concluded that the EU Forest Action Plan has been a useful means of operationalising the EU Forestry Strategy principles and coordinating action across the Member States and EU. There are limitations to the leverage that the Action Plan can exert on policy processes at EU level or implementation at Member State level; without a shared vision for EU forestry, the forestry response to the developments in other policy areas (e.g. climate action and energy) remains weak, and without clear commitments and targets the Member State reporting to EU level continues to lack consistency.

Based on the analysis, the following key recommendations were put forward as a contribution to the deliberations on the review of the EU Forestry Strategy and the possible follow-up to the Action Plan:

1. In order to increase commitment to an EU Action Plan, a joint effort is needed to develop and operationalise a common vision of multi-purpose and sustainable forest management. This would cover the following aspects:
- assess present and future societal demands on forests;
- balance the three dimensions of sustainable development, strengthening and defining a holistic view of Sustainable Forest Management in the EU;
- build capacities at both EU and Member State level to address new challenges and new societal demands for sustainable and innovative forest management, for example,

in forest information and monitoring, research and innovation, education, advisory services and communication.

2. In order to support effects and impacts of an EU Action Plan, strengthened instruments and structure for mutual information exchange and joint action are needed. This would cover the following aspects:

- define priorities and targets for action;

- link EU and Member State level funding strategies and plans to the EU Forestry Strategy and the EU Forest Action Plan priorities and actions;

- strengthen coherent cross-sectoral planning, funding and implementation of activities;

- besides pre-defined measures, maintain the possibility to define additional actions or refocus existing ones if the need arises during the implementation period;

- set up a clear mechanism for monitoring, evaluating and reporting;

- revise the mechanisms for involving stakeholders from economic, environmental and social interest fields;

- advance dialogue to support public awareness raising, science-policy-practice interaction, and improved preparedness for emerging challenges and opportunities.

## 1.3. Consultation with Member States and stakeholders

The new Communication on a Forest Strategy builds on a very close and extensive consultation process with both Member States and stakeholders during the preparatory phase.

A first discussion on the future of the EU Forestry Strategy took place at the 115th Standing Forestry Committee (SFC) meeting in July 2010 and continued at subsequent meetings in December 2010 and February 2011. In its meeting on the 18th of February 2011 the SFC decided that an ad hoc working group (WG) should be established to support and contribute to the review process.

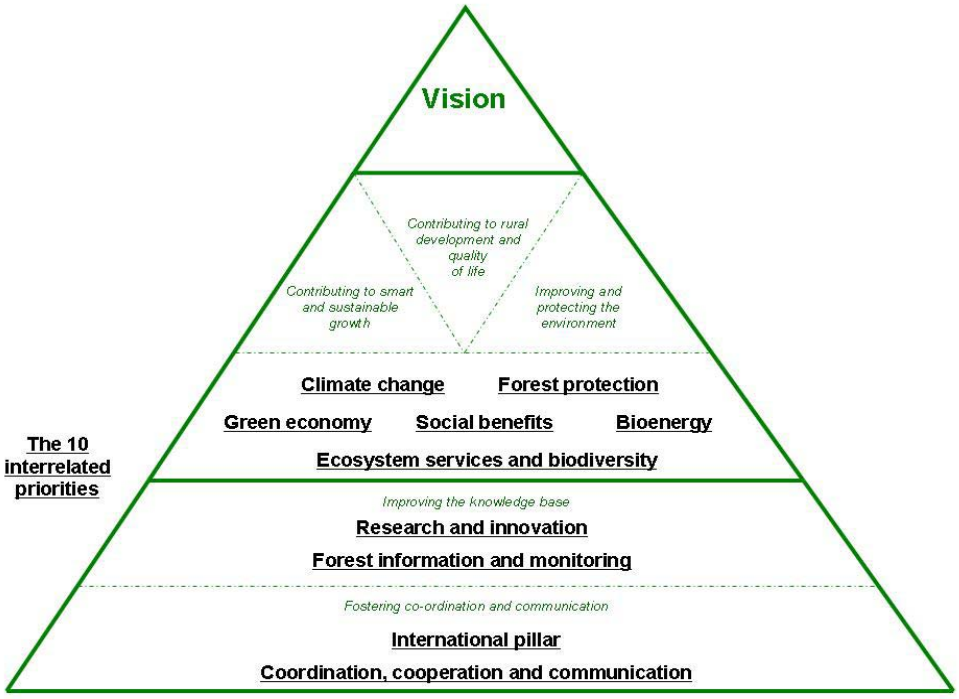
### *1.3.1. Working Group under the Standing Forestry Committee contributing to the development of a new EU Forest Strategy*

The ad hoc Working Group (WG) was set up in June 2011. It consisted of experts nominated by the Member States and by relevant stakeholder groups (private and public forest owners, forest-based industries, environmental NGO's, foresters and forest research), as well as experts from 10 different Directorate Generals of the

Commission[12]. The terms of reference for the WG specified that the overall objective of the WG was to make recommendations for a new EU Forest Strategy.

The WG met five times (15 June, 15 September, 18 November 2011, 9 February, 8 June 2012) and adopted a report in June 2012[13], providing ten key recommendations to the Commission. In the recommendations, it is suggested that the strategy is called forest strategy addressing also the value chain, that it affirms the EU commitment to the principles of sustainable forest management (SFM) as defined by Forest Europe, and enshrine and promote these principles in the management of all forests in the EU. Most members of the WG considered that the strategy should be a voluntary instrument, building on subsidiarity, including agreed lines of added value at the EU level with Member States (policy guidance on certain specified topics and for actions) and identifying other areas where some Member States would like to advance further, such as: regional /cross-regional cooperation; climate change adaptation and mitigation; forest health; valuation of ecosystem services; forest biodiversity, forest information and monitoring; forest fire; production and mobilisation of wood material from sustainable managed forests; promotion of wood based products and constructing with wood as part of the green economy; afforestation. Finally, the WG proposed a long term vision and a 2020 headline target and identified ten interlinked priorities (figure 1)

**Figure 1. Ten interlinked priorities proposed by the WG under the Standing Committee Forestry**




[12] The members list and dates of meetings can be found in annex 1 of the report, available at: http://ec.europa.eu/agriculture/fore/publi/index_en.htm

[13] Available at: http://ec.europa.eu/agriculture/fore/publi/index_en.htm

Lastly, the WG recommended that a Forest Action Plan/Framework that sets out specific actions for implementing the strategy, monitoring and reporting mechanisms should be developed within one year after adoption of the strategy.

### *1.3.2. Working Group under the Standing Forestry Committee on forest information and monitoring*

This ad hoc Working Group (WG) was set up in April 2011 and addressed the issue of forest information and monitoring that came out as the most important issue in the public and inter-institutional discussion following the 2010 Green Paper on Forest Protection and Information.

The WG consisted of experts nominated by the Member States and by relevant stakeholder groups (private forest owners, forest-based industries and environmental NGO's), as well as experts from 8 different Directorate Generals of the Commission. The WG included also representatives from the European National Forest Inventory Network (ENFIN) as well as from International Co-operative Programme on Forests (ICP Forests). The terms of reference for the WG specify that the overall objective of the WG was to contribute to the implementation of the EU Forest Action Plan in the field of EU-wide, cost-efficient and harmonized forest information.

The WG met four times (5 April, 28 June, 29 September and 5 December 2011) and adopted a final report in March 2012[14] that was discussed in the 124th, 125th and 126th meetings of the Standing Forestry Committee. The final report highlights critical issues, priorities and resource issues regarding forest information needs that relate to EU policies. It suggests a list of core variables to be considered for future work and priority setting on forest information.

The SFC agreed with the Commission's proposal to address forest information and monitoring at EU level by using a special budget from the European Parliament for a preparatory action with the JRC for harmonizing forest information collected by Member States.

### *1.3.3. Opinion of the Standing Forestry Committee contributing to the development of a new EU Forest Strategy*

The report of the WG contributing to the development of a new EU Forest Strategy was discussed in the 124th and 125th meetings of the Standing Forestry Committee and an opinion was adopted in this last meeting, that took place in September 2012[15]. In the opinion, the SFC welcomes the Working Group report and endorses its 10 recommendations. They urge the Commission to prepare a forest package by early 2013, the proposal for a new EU Forest Strategy acting as an umbrella, and including

[14] Link to the full report: http://ec.europa.eu/agriculture/fore/publi/sfc-wg6-2012_en.pdf

[15] The opinion is available at: http://ec.europa.eu/agriculture/fore/opinion-docs/sfc-opinion-new-eu-forest-strategy_en.pdf

initiatives on forest information, on wood processing industry and related value chains as well as providing data on the State of EU Forests.

The SFC suggests to the Commission to prepare a strategy as a fundamentally voluntary forest policy instrument at EU level, building on subsidiarity and respecting national competence. It should further develop lines of added value at the EU level agreed with Member States, provide policy guidance on certain specified topics, provide recommendations for actions and identify other areas where some Member States might wish to advance further than other's.

### *1.3.4. Workshops with Member States and Stakeholders*

A Workshop organised in April 2011 included representatives from Member States, stakeholders, several Commission services and the Cabinet of the Commissioner for Agriculture and Rural Development. This workshop[16] was the launching event for the work towards the new strategy and the outcome was used to get input and orientation for the Working Group under the SFC that was established later on. In the concluding remarks, it was considered that the review of the EU Forestry Strategy is an opportunity for the Member States, supported by the stakeholders, to put in place a common process to act on prioritised forestry issues that will be agreed upon in the strategy work. The need for coordination was considered important, but it is not going to make the different and to some extent even contradictory interests and objectives regarding forests to go away. Thus, it is necessary to face those different interests and find the best solution to balancing between them. In this framework, it would be important to prioritise and find those areas where we can add value with common actions at EU level.

A second workshop with Member States and stakeholders to present the report of the ad-hoc Working Group of the SFC took place in July 2012. During the debate several voices referred to the weak resources allocated to the sector that should fulfil many (and increasing) demands. Other issues underlined were the fact that research and innovation is among the EU priorities, the problem of forest fires, the need to strengthen the link between agriculture and forestry, the fact that forest products are underrepresented in the report, the lack of indicators to measure progress, the need to improve information about the strategy outside of the forest sector and to the society, the lack of references to certification, the necessary diagnosis of the sector before trying to improve the coordination and the increasing problem of fragmentation of forest policy (i.e. policies from other sectors where forests are important elements). In the workshop there was a general view supporting the review process. According to the discussion, the new strategy should contribute to Europe 2020 and other 2020 targets and include a "holistic view". Flexible instruments based on the agreement of the different parties involved were considered the right tools to apply, where each party should have its role, reflecting also respective competences and ensuring the three aspects of sustainability (economic, social and environmental). Last, it was underlined the need to ensure coherence between the strategy and the international instruments and, in particular, the future legally binding agreement.

[16] The reports of the workshops are available at: http://ec.europa.eu/agriculture/fore/publi/index_en.htm

### *1.3.5. Forest Directors General Meetings*

A presentation of state of play of the work was done in the informal Forest Directors General meetings under the Polish, Danish, Cypriot and Irish Presidencies (September 2011, June 2012, November 2012 and March 2013). In the meeting under the Cypriot Presidency the Forest Directors General provided guidance to the further steps of the forest strategy, as reflected in the final chair report. In particular, they expressed their concern about the level of implementation and visibility of the EU Forest Action Plan and uptake of SFC opinions for policy formulation in other areas. They stressed the need for improved coordination at EU level during the implementation, better monitoring and communication / outreach and they also underlined that the new EU Forest Strategy should:

- Include a clear vision/ objective/ target(s);

- Be a framework for policy developments related to forests, taking into account the future LBA. The strategy can make a difference only if it is meaningful for other policies outside the forest sector;

- Take a holistic view on the forest sector

- Address the whole value chain;

- Address the issue of balancing the delivery of multiple goods and services.

### *1.3.6. EC Advisory Groups*

The new Forest Strategy has also been discussed in several meetings of the Advisory Group on Forestry and Cork[17] (October 2011, June 2012, December 2012 and June 2013). In the discussions, it was underlined the need for a strong position on forestry for EU through the strategy to avoid the contradicting targets on forests in EU policies and to raise the competitiveness and forest sector's contribution to green economy and employment. The need to involve stakeholders in the process was specifically underlined. The Strategy was also presented in the Advisory Committee on Forest-based Industries[18] (plenary meetings of October 2011 and April 2012 and ad hoc Working Group meeting of November 2012).

### *1.3.7. Other fora*

Several stakeholder groups have also organised special sessions on the Forest Strategy where DG Agriculture and Rural Development has collected the different views on

[17] Further information available at: http://ec.europa.eu/agriculture/consultations/advisory-groups/forestry-cork/index_en.htm

[18] Further information available at: http://ec.europa.eu/enterprise/sectors/wood-paper-printing/advisory-committee/index_en.htm

the issues that the strategy should address. Thus, CEPF (private forest owners), EUSTAFOR (public forest owners), FERN and a group of environmental NGO's and UEF (foresters) have provided input to the process. CEPF, EUSTAFOR, CEPI (pulp and paper industry) and CEI-Bois (woodworking industry) and Finnish Forest Owners and Finnish Forest Industries have spontaneously made joint position papers on the strategy and Birdlife has provided some reports to be considered in the work.

From the research side, the University of Leuven has produced a position paper from the Leuven Metaforum on Forests that aims to support the review process[19].

Last, Think Forest, a high level discussion and information forum on forests coordinated by the European Forest Institute (EFI) has organised a special session on the strategy at the European Parliament on 18th of September 2012[20].

### 1.4. Consultation within the Commission

The Commission Inter-Service Group on Forestry discussed the preparation of the new Forest Strategy in five meetings (25 October 2011, 13 February 2012, 4 Mary 2012, 2 October 2012, 22 February 2013), and representatives of several Commission services actively participated in the two workshops and in the discussions of the two Working Groups of the Standing Forestry Committee, one dealing with the review of the 1998 EU Forestry Strategy and a second one specifically dealing with forest information and monitoring.

[19] Available at the following link: http://www.kuleuven.be/metaforum/docs/pdf/wg_15_e.pdf

[20] Further information available at: http://www.thinkforest.efi.int/portal/news/?bid=699

## 2. ANALYSIS

European forests serve different aims such as social (contribution to rural development), economical (raw materials like sawn wood for construction purposes or furniture, pulpwood for cellulose, insulation, packaging, paper and source of renewable energy), environmental (e.g. protection against soil erosion, avalanche control, regulation of streams and rivers, $CO_2$ capture) and societal (e.g. recreation, employment in rural areas).

### 2.1. State of the EU's forests

The EU currently contains 5 % of the world's forests and EU forests have continuously expanded for over 60 years, although recently at a lower rate. EU Forests and other wooded land now cover 155 million ha and 21 million ha respectively. This together means more than 42 % of EU land area is covered with forest and other wooded land. The Forest cover varies largely across Europe. The Member States with the largest proportions of wooded area are Finland and Sweden, where approximately three quarters of the land area is covered with forests or other wooded land. These same two Member States records the highest areas of wooded land per inhabitant, approximately ten times the EU average. Relatively high areas of wooded land per capita are also recorded in Estonia and Latvia. The least densely wooded EU Member States are Malta, the Netherlands, Ireland and the United Kingdom.

Area covered by forests in Europe has increased at a rate of approximately 0.4% per year since 1990, as a result of afforestation programmes, natural succession of vegetation and abandonment of farming. This is in contrast to the current global situation where the forest area continues to decline, with a global rate of deforestation still alarmingly high, impacting negatively on global climate and biodiversity. Only four of the EU Member States recorded a fall in their areas of wooded land in 2010, with Denmark recording the largest reduction (-5.0 %) ahead of Portugal, Slovenia and Finland. In relative terms, the largest expansions in wooded area were recorded in Ireland (21.4 %), while Bulgaria and Latvia both recorded increases in excess of 10 %. In absolute terms, four Member States recorded an expansion in excess of 400 000 hectares, namely France, Bulgaria, Italy and Spain, with the latter recording the highest increase (594 000 hectares).

The area of forests available for wood supply (FAWS) amounted to 133 million ha in the EU-27 in 2010, 102 million ha of which (77% of the total) is located in the EU-15 and 30.6 million ha (23%) in the EU-N12. In the EU-27, FAWS corresponded to 84.8% of the total forest area and this share was quite similar in the EU-15 (84.4%) and in the EU-N12 (86.1%). Cyprus (23.9%) and Portugal (52.7%) had the lowest share of FAWS in the total forest area, whereas in Belgium, Denmark, Germany and Luxembourg this share accounted for more than 95% of the total forest area.

Other wooded land (OWL) represents only a small part (6%) of the EU-27 land area, except in some areas of southern Europe (Greece, Spain and Cyprus) where it reaches around 20% of the land area. Indeed, in South Europe the climatic and edaphic conditions favour scattered vegetation[21]:

In the EU, forest nursery activities are linked to reforestation and afforestation, which could concern forested area, agricultural land (agricultural abandonment of marginal area), creation/renovation of hedges or agro-forestry.

[21] Source: Eurostat, Forestry in the EU and the world 2011

## Table 1. Forest area in the EU, EFTA and candidate countries

| | Forest | | Other Wooded Land | | FOWL | | FAWS | |
|---|---|---|---|---|---|---|---|---|
| | 2000 | 2010 | 2000 | 2010 | 2000 | 2010 | 2000 | 2010 |
| | (1000 ha) | | | | | | | |
| **EU-28** | 154 702 | 159 113 | 21 559 | 20364 | 176 261 | 179 477 | ***131 982*** | ***134 807*** |
| Belgium | 667 | 678 | 27 | 28 | 694 | 706 | 663 | 672 |
| Bulgaria | 3 375 | 3 927 | 105 | 0 | 3 480 | 3 927 | 2 258 | 2 864 |
| Croatia | 1 885 | 1 920 | 415 | 554 | 2 300 | 2 474 | 1 749 | 1 741 |
| Czech Republic | 2 637 | 2 657 | 0 | 0 | 2 637 | 2 657 | 2 561 | 2 330 |
| Denmark | 486 | 587 | 136 | 48 | 622 | 635 | ***481*** | 581 |
| Germany | 11 076 | 11 076 | 0 | 0 | 11 076 | 11 076 | 10 568 | 10 568 |
| Estonia | 2 243 | 2 203 | 94 | 134 | 2 337 | 2 337 | 2 103 | 2 013 |
| Ireland | 635 | 737 | 49 | 50 | 684 | 788 | ***472*** | ***460*** |
| Greece | 3 601 | 3 903 | 2 924 | 2 636 | 6 525 | 6 539 | 3 317 | 3 595 |
| Spain | 16 988 | 18 173 | 10 367 | 9 574 | 27 355 | 27 748 | 13 942 | 14 915 |
| France | 15 353 | 15 954 | 1 812 | 1 618 | 17 165 | 17 572 | 14 645 | 15 147 |
| Italy | 8 369 | 9 149 | 1 650 | 1 767 | 10 019 | 10 916 | 7 396 | 8 086 |
| Cyprus | 172 | 173 | 214 | 214 | 386 | 387 | 43 | 41 |
| Latvia | 3 241 | 3 354 | 123 | 113 | 3 364 | 3 467 | 3 024 | 3 138 |
| Lithuania | 2 020 | 2 165 | 83 | 84 | 2 103 | 2 249 | 1 756 | 1 875 |
| Luxembourg | 87 | 87 | 1 | 1 | 88 | 88 | 87 | 86 |
| Hungary | 1 907 | 2 039 | 0 | 0 | 1 907 | 2 039 | 1 622 | 1 726 |
| Malta | n.s. | n.s. | 0 | 0 | 0 | 0 | - | - |
| Netherlands | 360 | 365 | 0 | 0 | 360 | 365 | 290 | 295 |
| Austria | 3 838 | 3 857 | 117 | 134 | 3 955 | 3 991 | 3 341 | 3 343 |
| Poland | 9 059 | 9 319 | 0 | 0 | 9 059 | 9 319 | 8 342 | 8 532 |
| Portugal | 3 420 | 3 456 | 101 | 155 | 3 521 | 3 611 | 1 782 | 1 822 |
| Romania | 6 366 | 6 573 | 234 | 160 | 6 600 | 6 733 | 5 029 | 5 193 |
| Slovenia | 1 233 | 1 253 | 38 | 21 | 1 271 | 1 274 | 1 157 | 1 175 |
| Slovakia | 1 921 | 1 938 | 0 | 0 | 1 921 | 1 938 | 1 767 | 1 775 |
| Finland | 22 459 | 22 084 | 824 | 1 032 | 23 283 | 23 116 | 20 317 | 19 869 |
| Sweden | 28 512 | 28 605 | 2 225 | 2 020 | 30 737 | 30 625 | 20 947 | 20 554 |
| United Kingdom | 2 793 | 2 881 | 20 | 20 | 2 813 | 2 901 | 2 323 | 2 411 |
| Iceland | 18 | 30 | 83 | 86 | 101 | 116 | 18 | 29 |
| Liechtenstein | 7 | 7 | 1 | 1 | 7 | 7 | 4 | 4 |
| Norway | 9 301 | 10 250 | 2 699 | 2 134 | 12 000 | 12 384 | 6 519 | 6 419 |
| Switzerland | 1 194 | 1 240 | 63 | 71 | 1 257 | 1 311 | 1 156 | 1 200 |
| Montenegro | 467 | 467 | 277 | 277 | 744 | 744 | 386 | 386 |
| FYR of Macedonia | 958 | 998 | 143 | 143 | 1 101 | 1 141 | 804 | 804 |
| Turkey | 10 146 | 11 334 | 10 702 | 10 368 | 20 848 | 21 702 | 8 648 | 7 313 |

Figures in bold italics are estimates. FOWL = Forests and other wooded land

FAWS = Forests available for wood supply

Source: SoEF 2011, with estimates by Eurostat (Forestry in the EU and the world 2011)

### *2.1.1. Forest Productivity*

Forest productivity varies significantly among Member States, from a net annual increment of 0.9 m³ per ha in Cyprus and 1.3 m³ per ha in Greece, to a net annual increment of 11.1 m³ per ha in Germany and 13.4 m³ per ha in Denmark (source: Eurostat, 2010).

On average, 60-70% of the annual increment is cut, so the growing stock of wood keeps rising significantly. This is measured by the balance between net annual increment and annual felling's. This relation is decisive for the current and future availability of wood and for shaping a stable growing stock[22]: However, it should be mentioned that the net annual increment alone does not give any indication of the sustainability of forests and forest productivity[23]: Factors such as slow growth of the trees, the historical development of age class distribution and accessibility also need to be considered for any projection of future wood availability. According to MS projections under LULUCF, harvest rates are expected to increase by 2020 by around 30% compared to 2010[24].

The reporting of data on timber stocks follows in principle the international definitions of the FAO. In practice, however, only BE, CZ, DK, DE, FR, HU, IT, NL, PT and SE applied these definitions when delivering data to the FAO and Forest Europe (country reports for the Global Forest Resources Assessment 2010). The Decision of the European Parliament and of the Council on accounting rules and action plans on greenhouse gas emissions and removals resulting from activities related to land use, land use change and forestry[25] (LULUCF) contains an annex showing that only BE, DK, FI, FR, HU, IT, LU, NL and SE will apply the FAO'S definition of forests or a stricter variant (greater canopy cover). The other countries will apply a different minimum of forest area and/or a lower tree height. This Decision is foreseen to be based on the national definitions of forests.

Eurostat uses the physical data provided by the FAO and Forest Europe and provides estimates in the case of non-reported data.

[22] Source: SoEF 2011

[23] Source: Eurostat, Forestry in the EU and the world 2011

[24] Based on EU submission of projected forest management reference levels, to UNFCC CMP.6.

[25] Decision No 529/2013/EU

## Table 2. Growing stock, increment and fellings

| | Growing stock (million m3 ob) | | | | Increment | | Fellings (million m3 ob) | |
|---|---|---|---|---|---|---|---|---|
| | **FOWL** | | **FAWS** | | **FAWS** | | | |
| | **2000** | **2010** | **2000** | **2010** | **2000** | **2010** | **2000** | **2010** |
| **EU-27** | ***22 374,4*** | ***24 685,8*** | ***19 533,5*** | ***21 849,5*** | ***759,9*** | ***774,6*** | ***467,7*** | ***489,3*** |
| Belgium | 157,6 | 168,1 | 156,6 | 164,3 | 5,3 | 5,3 | 3,5 | 3,9 |
| Bulgaria | 526,8 | 656,0 | 321,0 | 435,0 | 13,6 | 14,7 | 3,8 | 7,8 |
| Croatia | 364,4 | 415,6 | 332,5 | 371,4 | 10,0 | 9,9 | 4,3 | 5,2 |
| Czech Republic | 698,8 | 769,3 | 678,3 | 737,7 | 21,5 | 23,1 | 15,9 | 17,9 |
| Denmark | 78,0 | 114,4 | ***70,8*** | 111,9 | 4,8 | 5,8 | 2,1 | 2,4 |
| Germany | 3 381,0 | 3 492,0 | 3 356,0 | 3 466,2 | 122,0 | 107,0 | 59,8 | 59,6 |
| Estonia | 463,0 | 447,2 | 427,5 | 398,3 | 11,8 | 11,2 | 12,4 | 5,7 |
| Ireland | 70,0 | 74,7 | 69,6 | 74,3 | ***0,0*** | ***0,0*** | 2,8 | ***2,8*** |
| Greece | 192,0 | 205,8 | 156,6 | 170,4 | ***4,2*** | ***4,5*** | 2,2 | 1,5 |
| Spain | 871,2 | 915,1 | 746,2 | 783,9 | ***43,8*** | ***45,8*** | 16,9 | 16,6 |
| France | 2 267,6 | 2 596,7 | 2 119,4 | 2 453,2 | 97,6 | 94,4 | 67,4 | 64,3 |
| Italy | 1 215,0 | 1 448,3 | 1 072,6 | 1 285,3 | 30,2 | 32,5 | 14,3 | 12,8 |
| Cyprus | 9,5 | 10,5 | 3,1 | 3,3 | 0,0 | 0,0 | 0,0 | 0,0 |
| Latvia | 548,1 | 634,9 | 507,0 | 584,0 | 17,7 | ***18,3*** | 15,5 | 12,4 |
| Lithuania | 452,0 | 481,9 | 391,6 | 408,0 | ***9,0*** | 10,8 | 6,3 | 8,6 |
| Luxembourg | ***26,0*** | ***26,0*** | ***12,8*** | ***13,9*** | 0,7 | ***0,7*** | 0,3 | 0,2 |
| Hungary | ***325,2*** | ***355,7*** | 303,0 | 259,2 | 9,3 | ***11,1*** | 7,0 | 6,9 |
| Malta | 0,0 | 0,0 | - | - | ***0,0*** | ***0,0*** | 0,0 | 0,0 |
| Netherlands | 61,0 | 70,0 | 49,0 | 56,0 | 2,2 | 2,3 | 1,3 | 1,6 |
| Austria | ***1 089,5*** | ***1 141,0*** | 1 059,8 | 1 106,7 | 28,9 | 25,1 | 17,5 | 23,5 |
| Poland | 1 736,0 | 2 304,0 | 1 584,0 | 2 092,0 | ***67,0*** | ***68,5*** | 31,4 | 40,7 |
| Portugal | ***197,8*** | 187,8 | 163,0 | 154,0 | 19,1 | ***19,1*** | ***12,6*** | 13,0 |
| Romania | ***1 348,2*** | ***1 391,5*** | ***740,9*** | ***838,0*** | ***34,6*** | ***34,0*** | 14,1 | 17,2 |
| Slovenia | 335,2 | 417,0 | 312,3 | 389,9 | 7,3 | 9,2 | 2,5 | 3,4 |
| Slovakia | 463,2 | 514,1 | 436,9 | 477,6 | 11,7 | 13,2 | 6,7 | 10,4 |
| Finland | 2 090,3 | 2 216,0 | 1 927,0 | 2 024,0 | 80,3 | 91,0 | 66,3 | 59,4 |
| Sweden | 3 097,2 | 3 252,2 | 2 268,0 | 2 651,1 | ***86,7*** | ***96,5*** | 71,2 | 80,9 |
| United Kingdom | 310,0 | 380,0 | 268,0 | 340,0 | 20,7 | 20,7 | 9,7 | 10,5 |
| Iceland | ***3,3*** | ***5,2*** | ***2,6*** | ***4,8*** | ***0,0*** | ***0,0*** | 0,0 | 0,0 |
| Liechtenstein | ***1,8*** | ***1,8*** | 1,4 | 1,4 | 0,0 | 0,0 | 0,0 | 0,0 |
| Norway | 852,0 | 1022,0 | 685,0 | 797,0 | 22,7 | 21,9 | 11,1 | 11,0 |
| Switzerland | 416,5 | 429,6 | 403,0 | 415,0 | 7,7 | *6,2* | ***7,2*** | 6,2 |
| Montenegro | 74,1 | 74,1 | 67,7 | 67,7 | ***2,2*** | ***2,2*** | ***0,6*** | 0,5 |
| FYR of Macedonia | ***80,0*** | ***77,5*** | 66,0 | 66,0 | ***4,6*** | ***4,6*** | ***2,8*** | ***2,9*** |
| Turkey | ***1 461,3*** | ***1 616,7*** | 1 198,4 | 1 084,7 | ***49,5*** | ***0,0*** | ***30,4*** | ***26,1*** |

Figures in bold italics are estimates.

FOWL = Forests and other wooded land
FAWS = Forests available for wood supply
Ob: over bark
Source: SoEF 2011, with estimates by Eurostat (Forestry in the EU and the world 2011)

### *2.1.2. Forest ownership*

Around 40 % of the forest area in the EU is publicly owned. Public ownership dominates in most of the eastern and south-eastern EU Member States. The average size of public forest holdings is more than 1000 ha, with considerable variations among countries[26]. Based on data for 24 EU Member States (incomplete data for Greece, Portugal and Sweden), the publicly owned forest area decreased by a total of 2.9 % between 2000 and 2010, whereas privately owned forest area increased by 8.6 %. The number of forest owners rose by nearly 3 million as a result of the enlargement[27].

The publicly owned share of forest area decreased between 2000 and 2010 in ten Member States, most notably in Romania, Slovenia and Lithuania and to a lesser extent in Austria, Finland, Latvia, Estonia and the United Kingdom. Some of the decreases in the new Member States that joined the EU as of 2004 may be due to the restitution of land to former owners, while other countries sold their public forest assets[28]:.

Around 60% of the EU's forests are in private hands, with about 16 million private forest owners. Private forest holdings have an average size of 13 ha, but the majority of privately owned forests are smaller than 5 ha[29]. The average size of the forest under private ownership varies considerably among Member States, from 0.7 ha per holding in Bulgaria to 130 ha per holding in Slovakia[30]. Nevertheless, the sector is changing. Alongside alterations in the structure of forest ownership in the EU, changes are also taking place in the occupations and lifestyles of private forest owners. Forest owners are becoming less dependent on forestry as a main source of income. Increasingly, the EU's forests are owned by urban dwellers, who may have different management objectives, compared with traditional rural forest holders[31].

[26] Source: The EU Forest Action Plan 2007-2011. EU Publications Office
[27] Source: The EU Forest Action Plan 2007-2011. EU Publications Office
[28] Source: Eurostat, Forestry in the EU and the world 2011
[29] Source: The EU Forest Action Plan 2007-2011. EU Publications Office
[30] Source: http://www.unece.org/forests/fr/outputs/soef2011.html State of Europe's Forests 2011
[31] Source: The EU Forest Action Plan 2007-2011. EU Publications Office

## Table 3. Forest ownership

| | Public | | Private | | Other | |
|---|---|---|---|---|---|---|
| | 2000 | 2010 | 2000 | 2010 | 2000 | 2010 |
| | (1000 ha) | | | | | |
| **EU-27** | ***65 340*** | ***64 101*** | ***88 384*** | ***94 233*** | ***977*** | ***780*** |
| Belgium | 290 | 301 | 377 | 377 | 0 | 0 |
| Bulgaria | 3 041 | 3 408 | 272 | 423 | 62 | 96 |
| Croatia | 1 398 | 1 396 | 487 | 524 | 0 | 0 |
| Czech Republic | 2 023 | 2 041 | 614 | 616 | 0 | 0 |
| Denmark | 138 | 139 | 348 | 424 | 0 | 23 |
| Germany | 5 846 | 5 708 | 4 824 | 5 283 | 406 | 85 |
| Estonia | 899 | 858 | 953 | 976 | 391 | 369 |
| Ireland | 399 | 400 | 236 | 337 | 0 | 0 |
| Greece | 2 790 | ***3 025*** | 811 | ***878*** | 0 | ***0*** |
| Spain | 4 988 | 5 336 | 11 998 | 12 836 | 2 | 2 |
| France | 3 984 | 4 113 | 11 369 | 11 841 | 0 | 0 |
| Italy | 2 811 | 3 073 | 5 558 | 6 076 | 0 | 0 |
| Cyprus | 118 | 119 | 54 | 54 | 0 | 0 |
| Latvia | 1 748 | 1 656 | 1 464 | 1 636 | 29 | 61 |
| Lithuania | 1 562 | 1 376 | 458 | 789 | 0 | 0 |
| Luxembourg | 41 | 41 | 46 | 46 | 0 | 0 |
| Hungary | 1 155 | 1 178 | 750 | 848 | 2 | 13 |
| Malta | ***0*** | ***0*** | 0 | 0 | 0 | 0 |
| Netherlands | 184 | 184 | 176 | 181 | 0 | 0 |
| Austria | 1 093 | 991 | 2 745 | 2 866 | 0 | 0 |
| Poland | 7 535 | 7 661 | 1 524 | 1 658 | 0 | 0 |
| Portugal | 54 | ***55*** | 3 366 | ***3 401*** | 0 | ***0*** |
| Romania | 6 010 | 4 451 | 356 | 2 122 | 0 | ***0*** |
| Slovenia | 365 | 291 | 868 | 962 | 0 | 0 |
| Slovakia | 1 006 | 980 | 830 | 827 | 85 | 131 |
| Finland | 7 213 | 6 698 | 15 245 | 15 386 | 0 | 0 |
| Sweden | ***7 639*** | 7 664 | ***20 873*** | 20 941 | 0 | 0 |
| United Kingdom | 1 011 | 959 | 1 782 | 1 922 | 0 | 0 |
| Iceland | 7 | 8 | 12 | 22 | 0 | 0 |
| Liechtenstein | 6 | 6 | 1 | 1 | 0 | 0 |
| Norway | 1 299 | 1 450 | 8 002 | 8 800 | 0 | 0 |
| Switzerland | ***856*** | 889 | ***313*** | ***325*** | 26 | 27 |
| Montenegro | 337 | 337 | 130 | 130 | 0 | 0 |
| FYR of Macedonia | 864 | ***898*** | 94 | ***100*** | 0 | 0 |
| Turkey | 10 131 | ***11 317*** | 15 | ***17*** | 0 | ***0*** |

Figures in bold italics are estimates.

Source: SoEF 2011, with estimates by Eurostat (Forestry in the EU and the world 2011)

### *2.1.3. Conservation status*

EU forests are mainly made up of predominantly coniferous stands (50%) and predominantly broadleaved stands (27%). The remaining part is mixed stands, including coniferous and broadleaved trees.

The EU 25 Member States (i.e. excluding Romania and Bulgaria) reported in 2008 on the conservation status of all the species and habitats listed in the Annexes of the Habitats Directive. The Commission then produced a consolidated report in 2008 on the conservation status and species protected under the Habitats Directive[32]. Habitat types associated with forest have in general a better conservation status than non-forest habitats. The conservation status of species and habitats of European interest differs strongly between bio-geographical regions.

According to a EEA report[33] in the EU, only 17 per cent of habitats and species and 11 per cent of key ecosystems protected under EU legislation are in a favourable status. Altogether more than 50% of species and nearly two thirds of habitats in forest ecosystems have an unfavourable conservation status, see figures 2 and 3 below. At the same time the State of Europe's Forests 2011[34] indicates positive development in EU's forests. According to this report, both EU's forest area and the area of protected forests are expanding and forest management practices increasingly promote conservation and sustainable use of biodiversity.

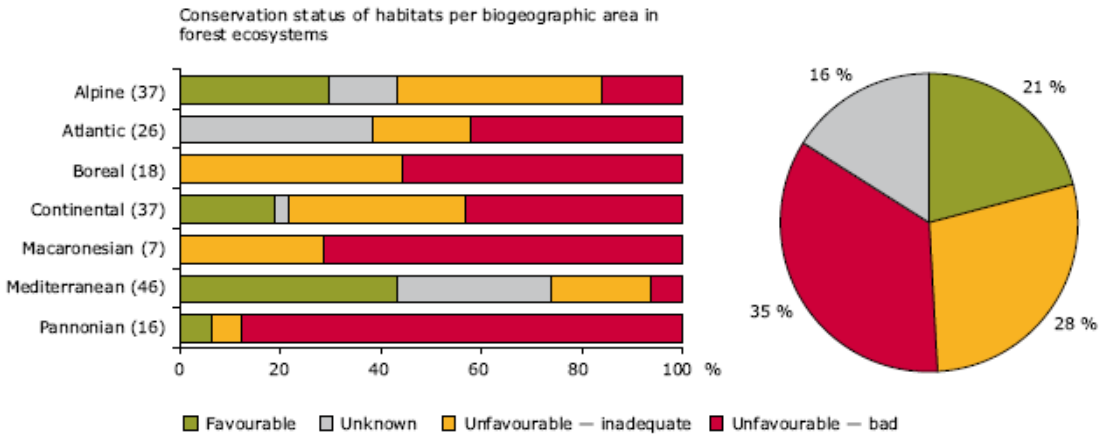
**Figure 2:**

**Conservation status of habitat types of European interest in forest ecosystems (statistics by region on the left, overall statistics on the right)**

[32] Source: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2009:0358:FIN:EN:PDF

[33] EEA Technical report nº 12/2010; EU 2010 biodiversity baseline

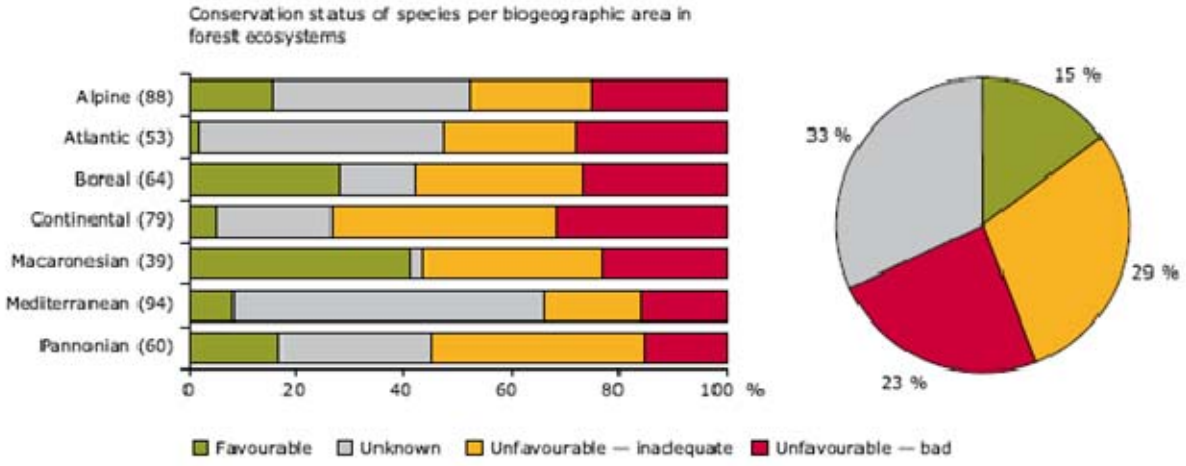
[34] Source: UNECE/FAO/Forest Europe report State of Europe´s Forests 2011- Status and trends in Sustainable Forest Management in Europe




Source: European Environment Agency technical report 12/2010

**Figure 3:**

**Conservation status of species of European interest in forest ecosystems (statistics by region on the left, overall statistics on the right)**




**Source:** ETC/BD, 2008.

Forests are subject to multiple pressures and can suffer a series of damages from biotic and abiotic sources. Furthermore, the effect of climate change, which will have a clear latitudinal effect through the increase of temperatures and drought in southern Europe, is already noticeable in the altitudinal gradient. Species at the lower altitudes of mountains in Europe are already suffering from decreased precipitation and increased temperature[35]. Therefore, the immediate effect that climate change signals is the shift in the range of suitability for forest tree species across Europe. These

[35] Source: MOTIVE and Trees4Future FP7 projects

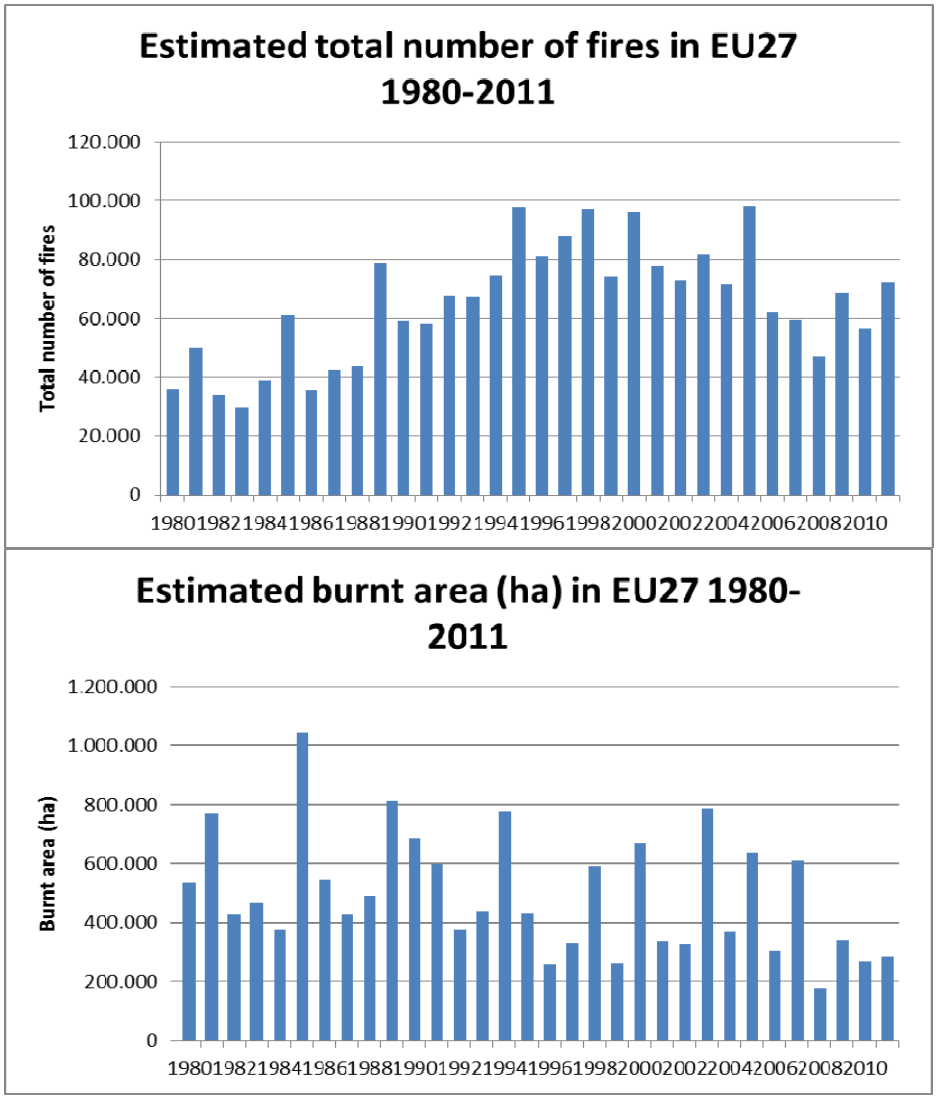
changes will certainly lead to an increase of biotic damages, as species become highly susceptible to the attack of pests. Forests will also become more susceptible to abiotic damages produced by more frequent windstorms, droughts and forest fires.

### *2.1.4. Forest Fires*

Currently, yearly damages due to forest fires are estimated to about half a million ha of forested areas, which is approximately 0.25% of the forests area in Europe and over half of the yearly increase of forest areas, as reported above. The yearly economic damage caused by forest fires is estimated to approximately € 2 billion[36]. 150 000 ha of Natura 2000 areas were damaged by fires in 2012.

[36] source: EFFIS

**Figure 4. Number of fires and burnt area in EU27 (1980-2011)**




Source: EFFIS and estimates

### *2.1.5. Soil quality*

Sulphur deposition has decreased over the last decade. Mean annual sulphur inputs decreased by 30% between 1998 and 2007, with significant reductions measured on half of the observed plots. For nitrogen compounds there is no clear trend in measured deposition[37].

In many parts of Europe, there is a tendency to acidification and eutrophication of soils. The development of pH and base saturation of soils did not show a uniform

[37] Source: SoEF, 2011

pattern within Europe. However, increased pH and base saturation were found in acidic forest soils[38]:.

### *2.1.6. Forests and ecosystem services*

Forests provide a wealth of benefits and services to the European citizens; these are often referred to as forest ecosystem services (FES). FES include wood and non-wood products as well as services such as recreation, water and soil conservation, protection against natural hazards, etc.

In the last years there has been an increased competition for forest products and services. For instance, European forests are the largest reservoir of biodiversity compared to other terrestrial ecosystems, while providing over 50% of the renewable energy in Europe. Growing demands represents an opportunity for this sector, but, at the same time, poses a significant challenge for maintaining forest ecosystems, increasing the potential for conflicts. It is important that SFM principles are applied to ensure in the long term the provision of multiple goods and services.

### *2.1.7. Forests and Natura 2000*

Overall, it is estimated that forest ecosystems cover around half of the surface of the Natura 2000 Network. This in turn represents around 1/4 of the total forest resource within the EU27. Furthermore, many other forests are home to animal or vegetal species protected under the EU Nature legislation.

**Table 4. Total Natura 2000 forest area and total forest within Natura 2000**

| Member State | Total Natura 2000 (km²) | Total Natura 2000 Forest* Area (km²) | % Natura 2000 which is Forest* | Total Forest* within Natura 2000 (%) |
|---|---|---|---|---|
| **Austria** | 12 317 | 4 790 | 38,40% | 12,64% |
| **Belgium** | 3 858 | 2 130 | 55,00% | 33,79% |
| **Bulgaria** | 37 648 | 22 220 | 58,84% | 52,53% |
| **Cyprus** | 1 626 | 88 | 79,17% | 36,63% |
| **Czech Republic** | 11 073 | 7 510 | 68,00% | 27,11% |
| **Germany** | 55 113 | 26 684 | 48,42% | 25,09% |
| **Denmark** | 3 858 | 7600 | 19,89% | 16,33% |

[38] Source: SoEF, 2011

| | | | | |
|---|---|---|---|---|
| **Estonia** | 8 035 | 4 683 | 58,28% | 18,73% |
| **Spain** | 137 224 | 79 503 | 57,94% | 41,83% |
| **Finland** | 48 731 | 28 823 | 59,15% | 11,81% |
| **France** | 68 770 | 30 380 | 44,18% | 18,86% |
| **Greece** | 35 793 | 20 155 | 56,31% | 33,95% |
| **Hungary** | 19 937 | 8 330 | 41,78% | 41,06% |
| **Ireland** | 9 155 | 1 211 | 13,22% | 17,22% |
| **Italy** | 57 705 | 29 912 | 51,84% | 30,11% |
| **Lithuania** | 7 864 | 5 067 | 64,43% | 24,14% |
| **Luxemburg** | 474 | 294 | 62,01% | 31,22% |
| **Latvia** | 7 303 | 4 033 | 55,22% | 12,39% |
| **Malta** | 40 | 10 | 24,38% | 25,19% |
| **Netherlands** | 5 724 | 1 199 | 20,94% | 37,91% |
| **Poland** | 60 796 | 34 049 | 56,00% | 35,09% |
| **Portugal** | 19 204 | 7 775 | 40,48% | 21,39% |
| **Romania** | 42 639 | 22 472 | 52,70% | 29,63% |
| **Sweden** | 57 425 | 22 808 | 39,72% | 7,69% |
| **Slovenia** | 7 201 | 4 998 | 69,41% | 42,28% |
| **Slovakia** | 14 132 | 9 701 | 68,64% | 44,55% |
| **United Kingdom** | 17 711 | 1 334 | 7,53% | 6,14% |
| **EU27 Total** | **751 368** | **382 009** | **50,84%** | **23,10%** |

Note: Calculations performed with data from End 2010 Natura 2000 database and Corine Land Cover 2006 and Corine Land Cover 2000 for UK and GR

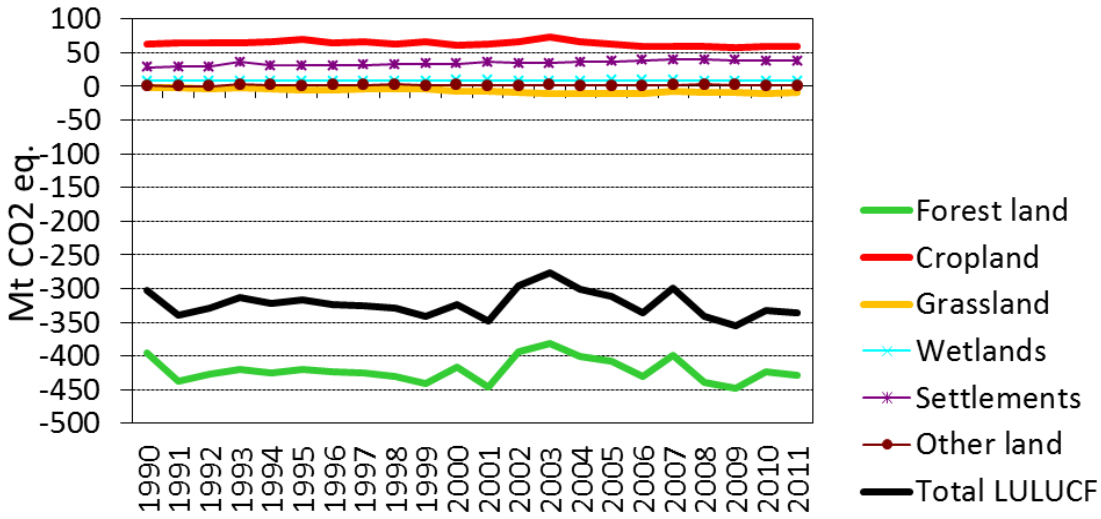
*CLC classes grouped as forests: 311 Broad-leaf forests; 312 Coniferous forests; 313 Mixed forests; 323 Sclerophyllous vegetation; 324 Transitional woodland-shrub

### *2.1.8. Forests and Climate Change*

The role of forests in climate change mitigation is particularly important as forests remove around 11% of greenhouse gases emitted in other parts of the economy (9% for the whole LULUCF) and provide bio-materials that can act as temporary carbon

stores (harvested wood products) or as “carbon substitutes”, replacing carbon intensive materials and fuels.

**Figure 5. Trend in emissions and removals by land uses in the EU**




Source: 2013 National Inventory Submissions to UNFCCC

### *2.1.9. Sustainable Forest Management*

Sustainable Forest Management is the stewardship and use of forests and forest lands in a way, and at a rate, that maintains their biodiversity, productivity, regeneration capacity, vitality and their potential to fulfil, now and in the future, relevant ecological, economic and social functions, at local, national, and global levels, and that does not cause damage to other ecosystems[39]:.

There are several initiatives across the EU to support, implement and assess sustainable forest management. Criteria and indicators have been developed by Forest Europe for the pan-European region to report on the implementation of sustainable forest management by countries.

The six pan-European criteria for reporting SFM are:

- Maintenance and appropriate enhancement of forest resources and their contribution to global carbon cycles;
- Maintenance of forest ecosystems' health and vitality;
- Maintenance and encouragement of productive functions of forests (wood and non-wood);
- Maintenance, conservation and appropriate enhancement of biological diversity in forest ecosystems;
- Maintenance, conservation and appropriate enhancement of protective functions in forest management (notably soil and water); and

[39] Source: Second Ministerial Conference on the Protection of Forests in Europe, 16-17 June 1993, Helsinki/Finland, "Resolution H1 - General Guidelines for the Sustainable Management of Forests in Europe"

- Maintenance of other socio-economic functions and conditions.

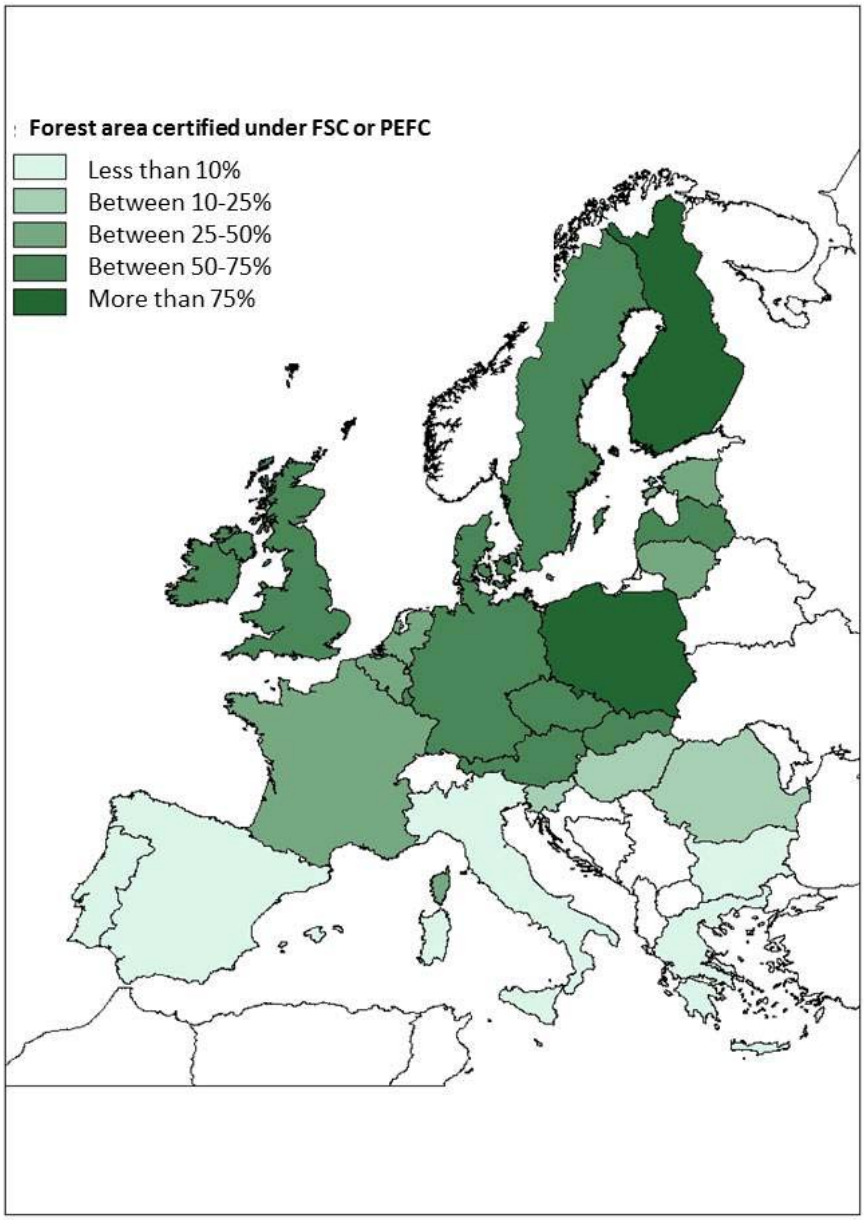
Associated indicators were initially adopted by the Ministers in Lisbon (1998). They were later simplified and further improved to be endorsed at the Vienna MCPEE (2003) as "Improved Pan-European Indicators for Sustainable Forest Management". They are used to assess progress towards sustainable forest management in the pan-European region both at regional and national level. This progress and up-to-date information on European forests is regularly being presented in the "State of Europe's Forest" reports.

Forest management plans (FMP) are an important tool for the implementation of SFM at the operational level, and can be a proxy to sustainability. FMP are information (in the form of text, maps, tables and graphs) collected during periodic forest inventories at operational forest unit level (stands, compartments) and operations planned for individual stands or compartments to reach the management goals. Equivalent instruments is information collected on forest area, at forest management or aggregated forest management unit level (forest blocks, farms, enterprises, watersheds, municipalities or wider units) and strategies/management activities planned to reach the management or development goals[40].

Forest certification has been one of the tools to document the sustainability of forest management. Looking at the number of ha certified and products carrying a logo of certification, it is clear that certification has gained importance, year after year. In the EU around 50% of forests and other wooded land are certified by FSC[41] or PEFC[42], although there are large differences between countries (figure 6). At global level, area certified by the two main voluntary forest management certification systems (PEFC and FSC) cover 412 million ha of forest (165 million ha under FSC[43] and 247 million ha under PEFC[44]), which represents around 10% of the forest world area.

[40] Source: Forest Europe
[41] Forest Stewardship Council
[42] Programme for the Endorsement of Forest Certification
[43] Based on 2012 FSC data available at https://ic.fsc.org/facts-figures.19.htm
[44] Based on 2012 PEFC data available at http://pefcregs.info/statistics.asp

**Figure 6. Certified area in the EU**




Source: Calculated from FSC and PEFC, 2012.

Model Forests is an initiative for landscape-scale platforms and broad stakeholder engagement, which carry out global change studies, develop and test local-scale innovation and adaptation strategies, and monitor such efforts over the long term. Thus, it can contribute to support sustainable forest management by implementing resource management policies at the local level, establishing networks and ensuring the participation of local communities. There are a few initiatives being developed in the EU, some of which are supported by EU programs such as Interreg (e.g. Baltic and Mediterranean model forest networks).

### *2.1.10. Agroforestry*

Agroforestry systems, which are at the interface between agriculture and forestry, are also important to mention. Agroforestry is the integration of trees, crops and/or livestock on the same area of land. Trees can stand inside parcels or on the boundaries (hedges). Agroforestry can be applied to all agricultural systems, in all parts of Europe. Agroforestry systems are obtained by planting trees on agricultural land or by introducing agriculture in existing woodland (e.g. silvopasture). This land use can optimise the benefits from the biological interactions created when trees and/or shrubs are deliberately combined with crops and/or livestock and can help to cope with growing challenges, including climate change adaptation.

Europe has a unique heritage of traditional agroforestry systems with a high environmental and cultural value, and a high potential for innovative modern agroforestry systems as developed by research centres across Europe during the last two decades. However, since no statistics on such practices exist, its contribution to agriculture or rural economy is undervalued.

## 2.2. State of the EU's forest sector

The importance of forests goes far beyond the environmental role, although their social and economic importance tends to be underestimated. Forests contribute to rural development through the provision of secure employment with competitive incomes.

Some 56% of the population in the EU live in rural areas, which cover 91% of the overall territory. Farming and forestry remain crucial for land use and the management of natural resources in the EU's rural areas as well as being a basis for economic diversification in rural communities.

Wood is still the main source of income for most forest owners, delivering the raw material to the forest-based industries and to the bioenergy sector. Forest-based industries are an important industrial branch representing 7% of added value of total manufacturing in the EU and providing around 3 million jobs. These industries, in particular woodworking, were especially hit by changes affecting economies, with important impacts also being felt upstream. Woody biomass is also the most important source of renewable energy, representing 50% of the EU gross final energy consumption from renewable biomass sources.

In addition, forests produce a large range of other products, such as cork, for which the EU accounts for 80% of worldwide production, resins, medicinal plants, mushrooms, truffles, game, nuts and berries. Resin is increasingly used by the chemical industry, which is contributing to a re-flourishing of resin extraction in the EU. EU rural development policy supports SFM and multifunctionality, contributing to further developing these non-wood products.

**Table 5. Production of roundwood, fuel wood and other basic wood products in the EU, EFTA and candidate countries 2011 (1000 m³)**

| 2011 | Roundwood | | | | | Wood chips and particles | Wood residues and pellets | |
|---|---|---|---|---|---|---|---|---|
| | Total | Industrial roundwood | | | Fuel-wood | | | |
| | | Total | Coniferous | Non-Coniferous | | | Total | Pellets |
| *EU-28* | *426752* | *334403* | *262099* | *72304* | *92349* | *64067* | *46978* | *11472* |
| Belgium | 5128 | 4235 | 3231 | 1004 | 893 | ***473*** | ***538*** | 0 |
| Bulgaria | 6205 | 3364 | 2005 | 1359 | 2841 | ***38*** | ***78*** | ***21*** |
| Croatia | 5258 | 3836 | 678 | 3158 | 1422 | ***175*** | ***248*** | ***:*** |
| Czech Republic | 15381 | 13467 | 12291 | 1176 | 1914 | 1157 | 1173 | ***102*** |
| Denmark | 2583 | 1468 | 1118 | 350 | 1115 | ***168*** | 0 | 0 |
| Germany | 56142 | 45358 | 36443 | 8915 | 10783 | ***10031*** | ***3101*** | 2679 |
| Estonia | 7470 | 5454 | 3699 | 1755 | 2016 | 2800 | 1793 | 554 |
| Ireland | 2627 | 2432 | 2431 | 1 | 195 | 509 | 165 | 0 |
| Greece | 1196 | 339 | 241 | 98 | 857 | ***2.5s*** | ***1.2*** | 0 |
| Spain | 16648 | 11528 | 4616 | 6912 | 5120 | 2080 | 2456 | 343 |
| France | 55041 | 28387 | 19585 | 8802 | 26653 | ***5041*** | ***8633*** | ***360*** |
| Italy | 6306 | 1662 | 1253 | 409 | 4643 | 2000 | 1200 | 743 |
| Cyprus | 8 | 5 | 5 | 0 | 4 | 2 | 4 | 0 |
| Latvia | 12833 | 11649 | 8445 | 3204 | 1184 | 3653 | 1358 | 973 |
| Lithuania | 7004 | 5346 | 3332 | 2014 | 1658 | 900 | 720 | 286 |
| Luxembourg | 261 | 244 | 107 | 137 | 18 | ***422*** | ***98*** | ***8*** |
| Hungary | 6073 | 2922 | 649 | 2273 | 3152 | 138 | 141 | 0 |
| Malta | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Netherlands | 978 | 688 | 471 | 217 | 290 | ***139*** | ***725*** | 171 |
| Austria | 18696 | 13631 | 12784 | 847 | 5065 | 4253 | 2965 | 1085 |
| Poland | 37180 | 32200 | 24969 | 7231 | 4980 | 2187 | ***5500*** | 643 |
| Portugal | 9140 | 8540 | 3258 | 5282 | 600 | ***96*** | ***1782*** | ***692*** |
| Romania | 14359 | 10344 | 5108 | 5237 | 4014 | ***577*** | ***2655*** | 350 |
| Slovenia | 3388 | 2052 | 1582 | 469 | 1336 | 82 | 314 | 92 |
| Slovakia | 9213 | 8570 | 5124 | 3446 | 643 | 1250 | 1515 | 121 |
| Finland | 50767 | 45526 | 38355 | 7171 | 5241 | 7760 | 5294 | 268 |
| Sweden | 72103 | 66203 | 62333 | 3870 | 5900 | 16000 | 4000 | ***1982*** |
| United Kingdom | 10021 | 8788 | 8665 | 123 | 1234 | 2309 | 770 | 0 |
| Iceland | : | : | : | : | : | : | : | : |
| Liechtenstein | 26 | 8 | 7 | 1 | 18 | 19 | 0 | 0 |
| Norway | 10291 | 8506 | 8468 | 39 | 1785 | ***0s*** | ***303*** | ***44689*** |
| Switzerland | 4861 | 3322 | 2840 | 482 | 1539 | 0 | 846 | 0 |
| Montenegro | 364 | 208 | 177 | 31 | 156 | ***0*** | ***0*** | : |
| FYR of Macedonia | 631 | 101 | 40 | 61 | 530 | ***0*** | ***0*** | : |
| Turkey | 21039 | 16423 | 10147 | 6276 | 4616 | ***850*** | ***850*** | : |

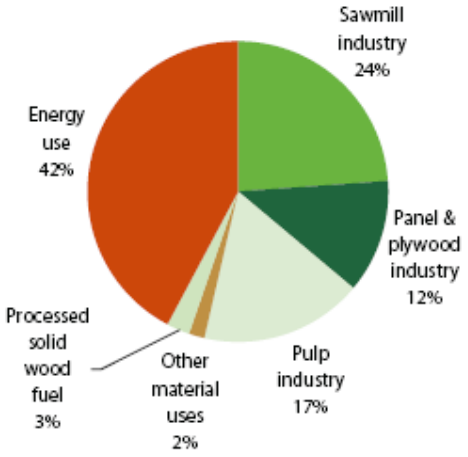
Figures in bold italics are estimates: Not available

Source: Eurostat 2013

### *2.2.1. Wood resources*

Figure 7 provides an overview of the current use of wood from all sources (not just forests) in the EU. Some of the wood resources used for energy come directly from forests (and other primary sources) and the remainder are production residues from industrial wood processing, including black liquor from paper production, and re-cycled wood waste.

**Figure 7. Wood resources in EU27 in 2010**

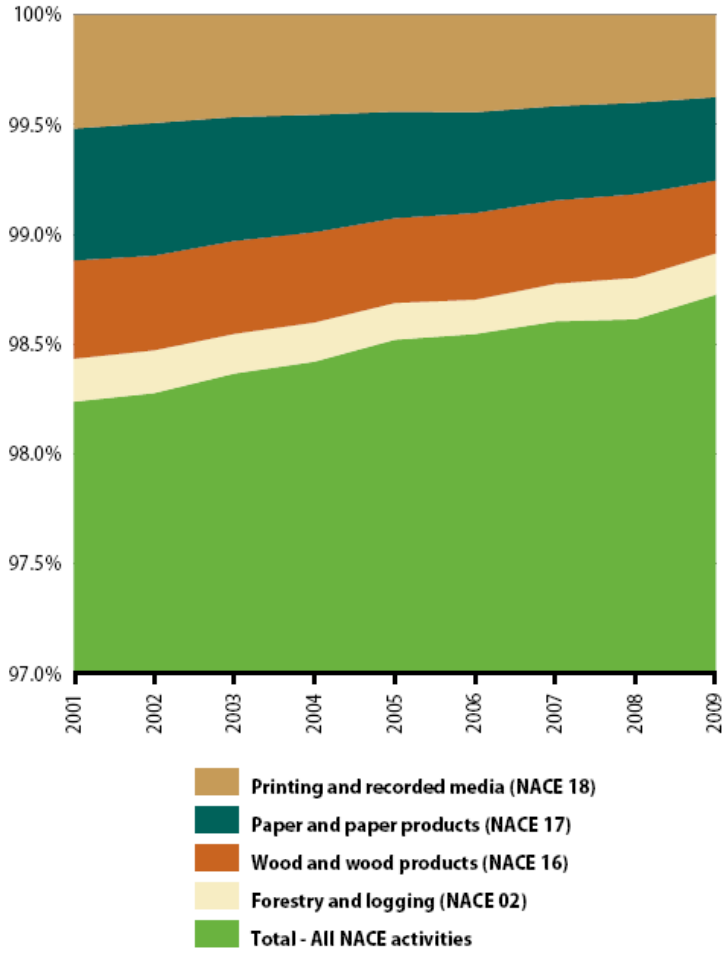



Source: EUwood, 2010

Figure 8 shows the forest sector's share of GDP. As can be seen in the figure, the wood-based sectors' share of GDP fell from 1.79 % in 2001 to 1.29 % in 2009. Forestry and logging appears to be the only wood based sector that did not decline, as measured against the development of GDP for all economic activities. These basic data were estimated by national accounts.

When indexed on 2005, the gross value added of forestry and logging increased faster than the gross value added of all economic activities up until the recent financial and economic crisis of 2008. In 2009, forestry and logging was level with the index of all activities, while wood products, paper and printing dropped below the trend for all activities. For forest-based industries, further details will be included in a separate document.

**Figure 8. Forest sector´s share of GDP (2001-2009)**

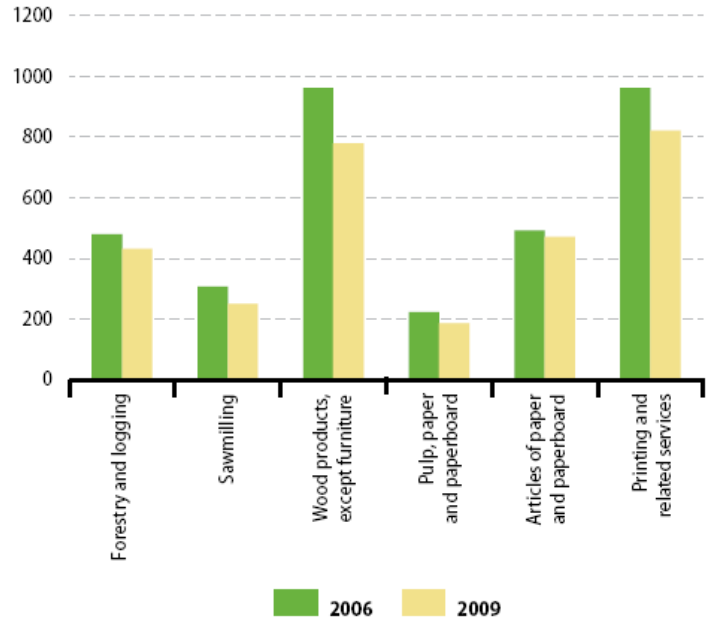



Source: Eurostat

### *2.2.2. Employment and Economy*

The number of persons employed dropped between 2006 and 2009 in all the wood-based sectors, according to national accounts data, see figure 9:

**Figure 9. Persons employed in the forest sector in EU27 (1000)**




Source: Eurostat

In 2010 the average labour productivity in the forestry sector (calculated as value added per employee) varied substantially among Member States. The highest labour productivity is found in Finland (€101,240 per employee), whereas Bulgaria reached only €7,770 per employee. The relative increments of labour productivity in forestry between 2006 and 2010 also differ significantly across the EU. The highest average annual growth rate of the labour productivity was observed in Hungary (+12.2% between 2006 and 2009) and Slovenia (+11.5%), whereas the labour productivity of forestry decreased in France (-9.7%), in the United Kingdom (-7.3), in Greece (-2.1% between 2006 and 2009) and in Finland (-3.7%). The decrease in labour productivity was particularly high between 2009 and 2010 in several countries where it reduced by 15% or more: Germany (-16%), France (-20%), Finland (-34%) and the United Kingdom (-20%)[45].

Gross fixed capital formation (GFCF), which measures how much of the new value added is invested rather than consumed, is a key element for assessing future competitiveness. € 1.4 billion were invested in the forestry sector in 2009, accounting for 13.5% of its total Gross Value Added (GVA), of which EUR 1.17 billion (84% of the total) were invested in Sweden and Finland. The gross fixed capital formation in forestry decreased by more than 40% between 2008 and 2009. The highest relative share of GFCF in GVA of the forestry sector is found in Cyprus (67%), followed by Greece and the United Kingdom (26%). [46].

Regarding forest-based industries, further details will be provided in a separate Staff Working Paper.

[45] Source: Eurostat - Economic Accounts for Forestry & Labour Force Survey, update 27/09/2012
[46] Source: Eurostat - Economic Accounts for Forestry, update 27/09/2012

The EU has signed voluntary partnership agreements with 6 countries that in 2011 exported around 31 million tonnes of wood and articles of wood to the EU (table 6).

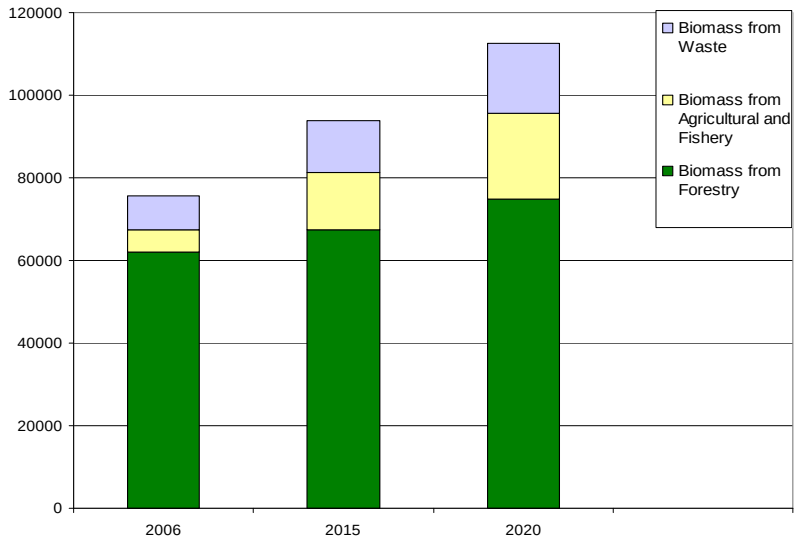
**Table 6. Total imports of wood and articles of wood, Chapter 44 of the Harmonised System**

| | 2005 | | 2007 | | 2009 | | 2011 | |
|---|---|---|---|---|---|---|---|---|
| | **Quantity (tonnes)** | **Value (1000 €)** | **Quantity (tonnes)** | **Value (1000 €)** | **Quantity (tonnes)** | **Value (1000 €)** | **Quantity (tonnes)** | **Value (1000 €)** |
| | **VPAs signed or agreed** | | | | | | | |
| Cameroon | 639.361 | 426.681 | 606.235 | 445.968 | 329.933 | 229.397 | 405.024 | 296.873 |
| Centr. African Rep. | 48.154 | 24.667 | 45.176 | 24.544 | 22.334 | 11.393 | 21.274 | 10.686 |
| Ghana | 124.280 | 121.120 | 97.474 | 100.122 | 46.440 | 47.454 | 46.353 | 49.053 |
| Indonesia | 699.465 | 702.183 | 479.553 | 653.728 | 331.682 | 427.024 | 332.283 | 468.149 |
| Liberia | - | - | 35 | 31 | 49.624 | 3.632 | 230.727 | 16.424 |
| Rep. of Congo (Brazzaville | 216.650 | 101.096 | 174.969 | 91.679 | 231.242 | 53.034 | 128.011 | 60.292 |
| | **VPAs under negotiation** | | | | | | | |
| Dem. Rep. of Congo | 134.275 | 69.443 | 318.215 | 123.995 | 228.183 | 58.551 | 106.569 | 56.113 |
| Gabon | 560.166 | 269.888 | 492.739 | 289.949 | 299.082 | 180.513 | 178.143 | 159.928 |
| Malaysia | 475.026 | 438.848 | 517.110 | 587.070 | 405.866 | 391.324 | 354.102 | 406.933 |
| Vietnam | 16.901 | 33.467 | 27.564 | 50.424 | 28.263 | 55.690 | 34.732 | 58.276 |
| Imports from FLEGT countries | 2.914.278 | 2.187.393 | 2.759.070 | 2.367.510 | 1.972.649 | 1.458.012 | 1.837.218 | 1.582.727 |
| Total imports | 41 087 965 | 10 636 018 | 40 090 964 | 13 392 913 | 25 310 312 | 8 097 771 | 31 801 815 | 10 040 614 |

### *2.2.3. Renewable energy*

Member States plan to mobilise significant additional domestic biomass resources for heating and electricity generation, which will increase from 76 Mtoe in 2006 to 113 Mtoe in 2020. According to estimates based on NREAPs, forestry will continue to be the predominant source of biomass supply, with an overall share of over 66% of total biomass as a renewable energy source by 2020 (rising from 62 Mtoe in 2006 to 75 Mtoe in 2020). Agriculture will be the second source (18%), more than tripling from 6 Mtoe in 2006 to 21 Mtoe in 2020) and the contribution of waste is projected to double (up to 15% share), increasing from 8.5 Mtoe in 2006 to 17 Mtoe in 2020.

**Figure 10. EU domestic biomass supply for heating/cooling and electricity, 2008-2020 (ktoe)[47]**

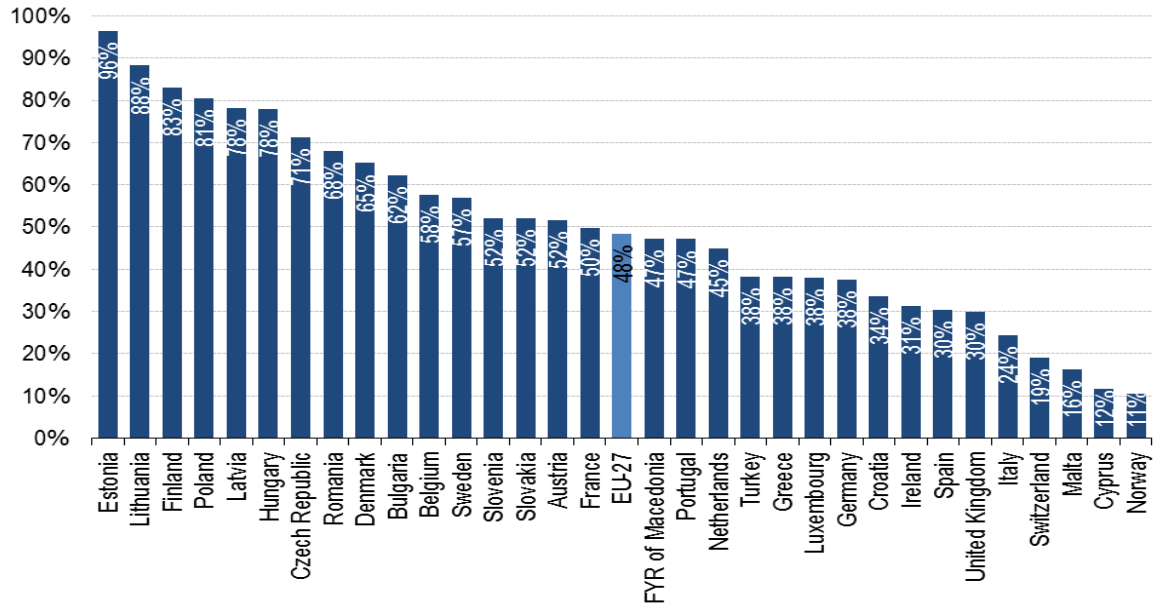



Source: European Commission's estimates based on 26 NREAPs data

Wood currently plays a prominent role in total renewable energy supply, providing around half of total renewable energy (figure 11). Households accounted for the largest share (61.3%) of the EU´s final energy consumption of wood and wood wastes in 2008 followed by paper manufacturing and printing (19.8%)[48].

[47] 2006 data include both domestic and imported biomass
[48] source: Eurostat

**Figure 11. Share of wood and wood waste in total renewable energy in the EU, EFTA and candidate countries in 2010 (% of gross inland consumption of renewable energy)**




Source: Eurostat

## 2.3. State of the policy environment

Despite the absence of a common forest policy, EU policies such as rural development, employment, climate change, energy, water and biodiversity influence Member States decisions on forests. There is a long history of the EU contributing to the implementation of sustainable forest management (SFM) through these other policies, see chapter 2.1.9.

Based on the principle of subsidiarity and the concept of shared responsibility, the 1998 EU Forestry Strategy[49] established a framework for forest-related actions in support of SFM, based on cooperative and beneficial linkages between the forest policies of the Member States and Community policies and initiatives relevant to forests. The Forest Action Plan[50] covering the period 2007-2011 was the main instrument for its implementation addressing four objectives referring to competitiveness, environment, quality of life and coordination and communication, see also chapter 1.1. Forestry Measures under the Rural Development Regulation have been the main financial driver for the implementation of the EU Forestry

[49] Council Resolution of 15 December 1998 on a forestry strategy for the European Union
[50] COM(2006)302

Strategy at the EU level. Other relevant measures include the Timber Regulation and FLEGT[51] and the Renewable Energy Directive.

The EU has also undertaken relevant international commitments. The Non-Legally Binding Instrument on All types of Forests under UNFF[52] aims to strengthen political support and action to SFM but there are also several conventions in related areas relevant for forests. These include CBD[53] and its Nagoya Protocol, FAO Commission of genetic resources for food and agriculture (CGRFA) including forest genetic resources, UNFCCC[54], UNCCD[55] or CITES[56], OECD scheme for the certification of forest reproductive material. Special attention is being given to the on-going negotiations for establishing a Legally Binding Agreement for forests in the pan-European area, in which the EU is participating.

The review of the Forestry Strategy took into account the overall context of EU policies, including:

- Europe 2020 strategy for smart, sustainable and inclusive growth - according to which the EU wants to become *a smart, sustainable and inclusive economy*, where the EU and the Member States can deliver high levels of employment, productivity and social cohesion. The Union has set five ambitious objectives - on employment, innovation, education, social inclusion and climate/energy - to be reached by 2020;
- Review of the Common Agricultural Policy, including a new regulation on Rural Development for the period post-2013;
- The EU Biodiversity Strategy and 2020 Target, including the outcome of the CBD COP in Nagoya;
- Existing legislation (Birds and Habitats Directives, etc.)
- The Commission proposal for a decision on LULUCF accounting and the further development of forest-related issues under UNFCCC towards a new international climate agreement;
- The EU targets on renewable energy share currently implemented at Member State level through National Renewable Energy Action Plans (NREAP);
- EU FLEGT Action Plan and EU Timber Regulation;
- Communication on "Innovative and Sustainable Forest-based Industries" COM(2008)113 and the analysis of its implementation;
- The 7th Environmental Action Plan

[51] Regulation 2173/2005 on the establishment of a forest law enforcement, governance and trade (FLEGT) licensing scheme for imports of timber into the European Community
[52] United Nations Framework Convention on Forests
[53] Convention on Biological Diversity
[54] United Nations Framework Convention on Climate Change
[55] United Nations Convention to Combat Desertification
[56] Convention on International Trade in Endangered Species of Wild Fauna and Flora

and of the initiatives on-going outside the EU:

- The development of a Legally Binding Agreement on forests within the Forest Europe process;
- Other International forest related processes (Rio+20, UNFF, FLEG, REDD+).

The relevant EU2020 targets and the contribution from forests are included below:

**Table 7. Relevant EU targets and contribution from forests and the forest sector**

| EU targets | Contribution from forests and the forest sector |
|---|---|
| **Growth and jobs**: 75% employment rate by 2020<br><br>Reverse the declining role of industry in Europe from its current level of 15.2% of GDP to as much as 20% by 2020<br><br>**Poverty and social exclusion**: 20 million fewer people in or at risk of poverty and social exclusion | European Structural and Investment Funds contribute to poverty eradication and social cohesion.<br><br>3 million jobs in the EU are provided by the forest sector, particularly important in rural areas.<br><br>Forest-based industries represent 7% of the total added value and 8% of total employment of manufacturing. |
| **Climate change**: in 2020 reduction by 20% of $CO_2$ emissions compared to 1990 | In 2009, LULUCF removed an amount of carbon from the atmosphere equal to about 9% of the EU's total greenhouse gas emissions (GHG) in other sectors[57].<br><br>MS are obliged to provide information on LULUCF action and have international obligations until 2020 to enhance sinks and reduce emissions from LULUCF under the 2nd Commitment Period of the Kyoto Protocol. |
| **Energy**: 20% share of energy from renewable sources by 2020 | In 2012 wood energy represented 50% of the total EU renewable energy consumption. |
| **Biodiversity**: to halt the loss of biodiversity and ecosystem services degradation in the EU by 2020, restoring them in so far as feasible | 50% of terrestrial Natura 2000 network is on forests or other wooded land. |
| **Deforestation**: to halt global forest cover loss by 2030 and to reduce gross tropical deforestation by at least 50% by 2020 compared to current levels | Worldwide forests cover 30% of land. While EU forest area is increasing, deforestation is an important problem worldwide, accounting for 20% of global $CO_2$ emissions – more than total EU GHG emissions. |

[57] Impact Assessment on LULUCF (2011).

At EU level, forests and the forest sector currently receive important funds from the EU. Forestry measures under RD Regulation constitute the resource backbone for the implementation of the strategy adding up to around 90% of total EU funds spent on forestry. LIFE+ provides support for nature protection and forest information needs, and cohesion and structural funds support regional development projects. Horizon 2020[58] and the European Innovation Partnerships (EIP) are important tools for the development of research and innovation actions. One EIP on agriculture sustainability and productivity has recently been launched[59] and another EIP on raw materials[60].

There is also some possibilities for state aid in the forest sector under certain conditions, see further information regarding this in chapter 2.3.8.

At international level, development, neighbourhood and climate change policies also provide relevant financing for third countries, with a relevant contribution through REDD+ and FLEGT.

Innovative financing mechanisms will also be needed to mobilise funding from both public and private sources, in particular for payment of ecosystem services.

Chapter 1 provides a background explaining the developments that followed the adoption of the EU Forestry Strategy in 1998, including in particular the Forest Action Plan and the Green Paper on Forest Protection and information. Below follows a detailed description of the EU actions already carried out or on-going under the different policies relevant for forests and the forest sector as well as financial possibilities under the different policies.

### *2.3.1. Rural development and cohesion policy*

#### 2.3.1.1. Rural development

If we want forests to maintain and maximise their functions, including protection, it is important to ensure that forests contribute to generate wealth and employment in rural areas.

**Part A: 2007-2013**

With forests covering over 40 % of EU land it seems clear that a policy aiming at developing rural areas has to cover also forests and forestry. This is already the case in the current Rural Development Regulation for the period 2007-2013[61]. The regulation is the main financial instrument for the implementation of the EU Forestry Strategy and the EU Forest Action Plan (2007-2011), which Member States have to take into account when defining their national rural development strategies and rural development programmes. Compared to earlier Rural Development Regulations, the European Agricultural Fund for Rural Development (EAFRD) offers a more coherent

[58] COM(2011) 808 final
[59] COM(2012) 79 final
[60] COM(2012) 82 final
[61] Council Regulation (EC) No 1698/2005, OJ L 277, 21 October 2005

and structured set of measures that support forestry, with a strong emphasis on Sustainable Forest Management (SFM). The regulation offers a comprehensive toolkit for Member States with more than 40 measures through 3 Axis and the Leader approach to choose for their programmes. This toolkit includes 8 measures specifically targeting forests and 7 others that can be used among others for forest related activities. All of these (apart from one) are within Axis 2 ("Improving the environment and the countryside"), and should therefore contribute to the EU-level priority objectives of biodiversity, water and climate change. Member States are free to choose measures and allocate budgets according to their specific needs in the current 88 Rural Development Programmes (RDP) including national and regional programmes.

The total financial resources allocated by Member States to the 8 forestry-specific measures were initially €12 billion including public and private funds and also including €6 billion from the rural development fund. This constitutes about 7 % of overall intended EAFRD spending. Since the adoption of the programmes in 2007-2008 they are under continuous modifications (including the "Health-check" related ones[62]) in order to be adapted to new challenges and to changing needs and adaptation capacity. Since the economic crisis started in 2008, forestry measures are also subject of financial adjustments. The Commission prepared a report in 2009 on the implementation of forestry measures which summarised the planned measures and planned allocation of resources for forestry and forestry related measures according to the original programmes (before any modifications)[63]

In addition to the forestry-specific measures substantial amounts of funding is directed to forestry through those axis 1 ("Improving the competitiveness of the agricultural and forestry sector") measures which can cover both agricultural and forestry activities. The measures "adding value to agricultural and forestry products" and "support to infrastructure related to the development and adaptation of agriculture and forestry" have the largest budgets among these forestry-related measures.

Adding together the funding intended for forestry-specific (€ 6 billion) and forestry-related measures (€ 1-2 billion) it was expected that around € 8 billion would be made available from the Community budget (EAFRD) and up to € 16 billion in total. These amounts correspond respectively to 9 % of the EAFRD funding and 7-8 % of the total amount of financial resources devoted to rural development programmes during the programming period 2007-2013.

[62] The Health Check of the Common Agricultural Policy from 2008, includes a provision to strengthen Rural Development Policy. In particular as regards the new challenges that European agricultural and rural areas are facing. Forestry measures were relevant for all the new challenges, which include climate change, renewable energy, water management and biodiversity.

[63] http://ec.europa.eu/agriculture/fore/publi/forestry_rurdev_2007_2013_en.pdf

## Implementation of forestry measures during 2007-2013

The implementation of forestry measures started slowly and the data shows that by the end of 2011 there appears to have been some under-spending for forestry measures compared to the original target and even compared to the updated targets which take into account the on-going modifications. In terms of the realised payments two environmentally focused measures performed very much under the average; payments for the forest-environment and Natura 2000 measures where less than 14% of the updated and reduced budget. The implementation of afforestation of agricultural land performed the best 40%. However, in this case there is a significant determination for payments(delay in actual payments), because of the long commitment period from the previous programming periods for payments for lost income, which is still under execution for afforestation during 2000-2006. Even if the measure targeting restoring forestry potential and prevention against fires and natural disasters has a long history since the 80'ies, the implementation is just almost the same as for afforestation, around 40%. In average the financial implementation of eight forestry specific measure was 34% by the end of 2011. Considering that 2013 is the last year for implementation of the measures and for using the available financial resources, it is understandable that sember states made several financial reallocations to avoid losing EAFRD funds. As a result of these reallocations the new updated plan for the above 8 forestry specific measures has been modified to €5.4 billion which is 88% of the planned €6.1 billion in 2007.

The financial implementation of the measures, i.e. the requested EAFRD payments, increased in 2012. This can be explained by the fact that many forestry measures cover multiannual activities and payments for the work done comes progressively (e.g. establishment of new or replanting damaged forests). Table 8 shows the updated plan and the payments requested in the year 2012. According to these figures 48% of the planned expenses had been requested by the end of 2012. However, when comparing with the originally planned expenses the implementation level differs among measures, but altogether it is close to 42% of the planned level in 2007.

Spending for prevention and restoration has the best result; slightly over 55% of the originally planned. Measures providing support for non-productive investments and afforestation of agricultural land performed well; 55,5% and 45.7% respectively. Spending for afforestation of non-agricultural land (where there is no long commitment period and determination for payments for lost income). The only forestry specific Axis 1 measure supporting improvement of the economic value of forest through sustainable investments, reached already around 28% of their expected level. Payments for establishment of agroforestry systems, forest environment payments and for Natura 2000 are still lagging behind the expectations. However, both measures show some improvements during the last years. In the case of Natura 2000 payments the preparation of management plans or equivalent instruments was the first step of the implementation and the preparation of these plans could have received supports from an Axis 3 measure.

**Table 8. Implementation of forestry measures under Rural Development regulation**

| | Expenditures planned in 2007 | | | | Implementation of EAFRD expenses | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Public | EAFRD | Private | Total | 2007-2009 | | 2007-2010 | | 2007-2011 | | | 2007-2012 | | | |
| **Axis 2 measures with relevance to forestry** | (€ million) | (€ million) | (€ million) | (€ million) | by 2009(€ million) | % of planned (09/07) | by 2010 (€ million) | % of planned (10/07) | Updated plan in 2011 (€ million) | Realised by 2011 (€ million) | % of planned (11/11) | updated plan 2012 (€ million) | Realised by 2012 (€ million) | % of updated planned (12/12) | % of originally planned (12/07) |
| 221 First afforestation of agricultural land | 3659,4 | 2410,7 | 576,0 | 4235,3 | 487,9 | **20,2%** | 682,1 | **28,3%** | 2192,6 | 884,2 | **40,3%** | 2068,4 | 1102,1 | **53,3%** | **45,7%** |
| 222 First establishment of agroforestry systems | 32,4 | 22,7 | 14,4 | 46,8 | 0,0 | **0,0%** | 0,0 | **0,1%** | 18,7 | 0,2 | **1,0%** | 11,0 | 0,4 | **3,6%** | **1,8%** |
| 223 First afforestation of non-agricultural land | 596,2 | 360,8 | 181,8 | 778,0 | 21,6 | **6,0%** | 48,7 | **13,5%** | 327,1 | 73,6 | **22,5%** | 265,8 | 101,1 | **38,0%** | **28,0%** |
| 224 Natura 2000 payments | 158,6 | 110,6 | 0,0 | 158,6 | 3,7 | **3,3%** | 7,2 | **6,5%** | 92,5 | 12,9 | **13,9%** | 64,8 | 18,4 | **28,4%** | **16,6%** |
| 225 Forest-environment payments | 438,8 | 265,3 | 6,4 | 445,2 | 10,9 | **4,1%** | 17,5 | **6,6%** | 218,2 | 25,4 | **11,6%** | 193,6 | 34,4 | **17,8%** | **13,0%** |
| 226 Restoring forestry potential and prevention | 2474,2 | 1553,0 | 307,0 | 2781,2 | 217,6 | **14,0%** | 389,6 | **25,1%** | 1700,5 | 663,0 | **39,0%** | 1578,2 | 862,2 | **54,6%** | **55,5%** |
| 227 Non-productive investments | 1379,8 | 808,9 | 216,9 | 1596,7 | 71,2 | **8,8%** | 131,4 | **16,3%** | 746,9 | 212,5 | **28,5%** | 748,2 | 315,4 | **42,2%** | **39,0%** |
| **Axis 2 forestry measures** | **8739,4** | **5532,1** | **1302,4** | **10041,8** | **812,9** | **14,7%** | **1276,5** | **23,1%** | **5296,5** | **1871,8** | **35,3%** | **4930,0** | **2434,0** | **49,4%** | **44,0%** |
| **Axis 1 forestry measure** | | | | | | | | | | | | | | | |
| 122 Improvement of the economic value of forests | 1000,6 | 652,1 | 1010,0 | 2010,7 | 50,8 | **7,8%** | 91,4 | **14,0%** | 591,7 | 136,8 | **23,1%** | 507,5 | 178 | **35,1%** | **27,3%** |
| **Total for eight forestry-specific measures** | **9740,0** | **6184,2** | **2312,4** | **12052,4** | **863,7** | **14,0%** | **1367,9** | **22,1%** | **5888,2** | **2008,6** | **34,1%** | **5437,5** | **2612,0** | **48,0%** | **42,2%** |

Source: European Commission, 2013

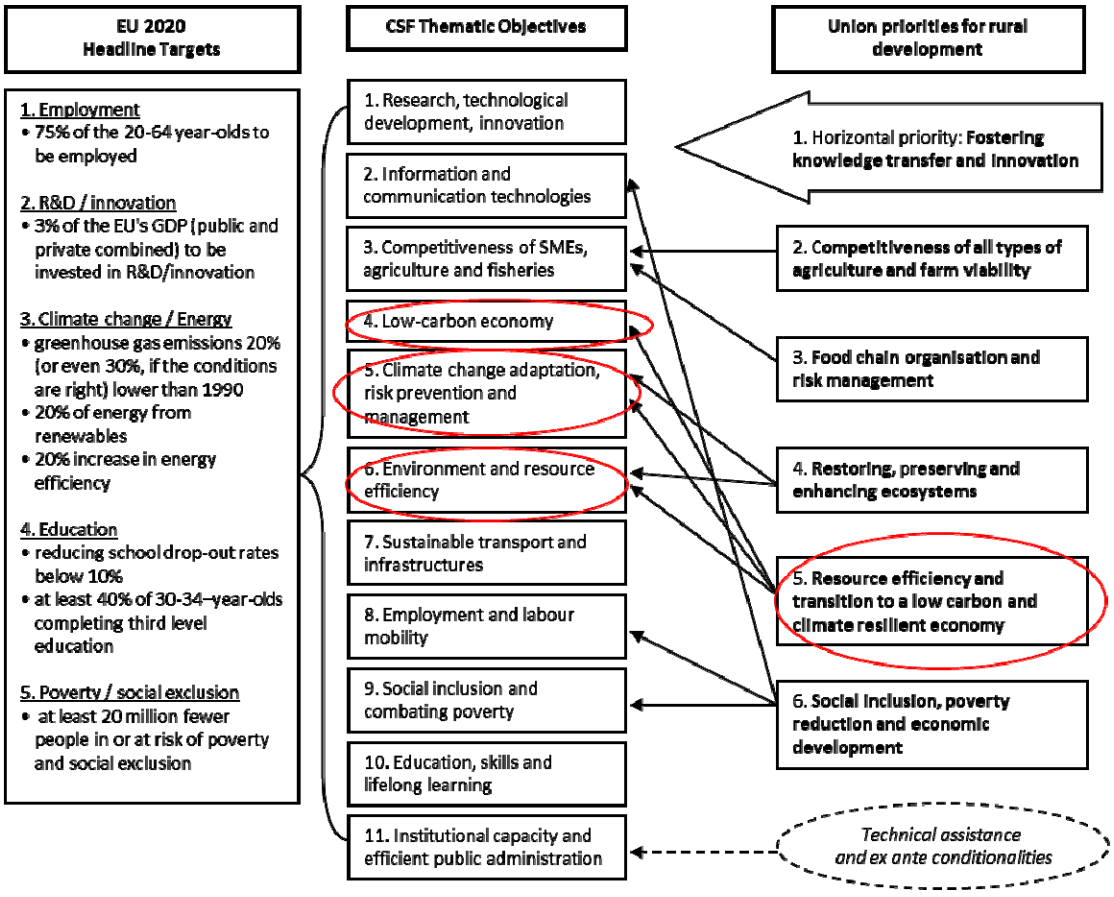
Concerning the physical implementation of the above mentioned measures the available preliminary intermediate data by the end of 2011 still show a moderate development in the implementation. It means that in the case of afforestation where the payment level was 40% by the end of 2011, the real planting of trees on agricultural land was lagging behind and only 122 000 ha compare with the planned 566 000 ha. This is close to 22% of the already modified plantation target. The original target for afforestation of agricultural land was 650 000 ha at the end of the adoption of the programmes in 2008.

Member States and stakeholders indicated that they had problem in interpretations of some requirements and considered that the high administrative burden and the low fund contributions were the main causes for the low level of performance.

## Part B: 2014-2020

The Commission presented a proposal for a regulation for the EAFRD 2014-2020[64] in October 2011, as part of its proposal to reform the Common Agricultural Policy (CAP). The EAFRD will no longer be divided into three areas or axis but into six priorities linked to the EU's 2020 strategy.

**Figure 12. Link between Europe 2020 and the EAFRD**




Source: European Commission, 2011

The proposed regulation acknowledges that forestry is an integral part of rural development. Support for sustainable and climate friendly land use should encompass

[64] COM(2011) 627 final/2

forest area development and sustainable management of forests. In the interest of simplification but also to allow beneficiaries to design and realise integrated projects with increased added value, there was an aim that a single measure should cover all types of support for forestry investments and management. This measure is intended to cover the extension and improvement of forest resources through afforestation of land and creation of agroforestry systems combining agriculture with forestry systems, restoration of forests damaged by fire or other natural disasters and relevant prevention measures, investments in forestry technologies and in the processing and marketing of forest products aimed at improving the economic and environmental performance of forest holders and non-remunerative investments which improve ecosystem and climate resilience and environmental value of forest ecosystems.

Based on the experiences gained through implementation of the current and previous measures, there was a need for simplification and for improving effectiveness by merging and regrouping existing measures and by allowing more flexibility to the Member States to take into account their national or regional specificities and the characteristics of forestry processes, which are different from and have a different time span than agricultural ones.

Forestry measures should be proposed in the light of undertakings by the Union and the Member States at international level, and be based on Member States' national or sub-national forest plans or equivalent instruments which should take into account the commitments made in the Ministerial Conferences on the Protection of Forests in Europe. Building on the work done through this Forest Europe process, there is now a requirement that for holdings above a certain size, to be determined by the Member States in the programme, support shall be conditional on the presentation of the relevant information from a forest management plan or equivalent instrument in line with SFM. (see chapter 2.1.9) This requirement, based on the subsidiarity principles, gives free hands to Member States to set an appropriate threshold which reflects their socio-bio-geographic specificities, however, at the same time acknowledges the importance of proper planning and results achieved in this field.

It is particularly important to acknowledge the multifunctional role that forests and forestry have for the rural economies and environments. Forestry measures should be constructed so that they simultaneously contribute to economic, environmental and social objectives. Measures aiming at improving the public amenity value of forests or environmental objectives (such as improving forest health, biodiversity, climate change resilience, protection of water and soil) should not exclude sustainable economic use of the supported forest areas.

These are the main forestry related measures in the draft regulation:[65]

Article 22: Investments in forest area development and improvement of the viability of forests;

- afforestation and creation of woodland (art. 23)
- establishment of agroforestry systems (art. 24)

[65] http://ec.europa.eu/agriculture/cap-post-2013/legal-proposals/com627/627_en.pdf

- prevention and restoration of damage to forests from forest fires and natural disasters, including pest and disease outbreaks, catastrophic events and climate related threats (art. 25)
- investments improving the resilience and environmental value as well as the mitigation potential of forest ecosystems (art. 26)
- investments in forestry technologies and in processing and marketing of forest products (art. 27)

Article 31: Natura 2000 and Water Framework Directive payments, and

Article 35: forest environmental and climate services and forest conservation

At the time of the preparation of the Forest Strategy and this Staff working document, the proposal for rural development was under discussion and preparation in the Council and in the Parliament, together with the related documents, e.g. Delegated Act, Guidelines. Member States are expected to prepare their rural development programmes by 2014, therefore, the past experiences and future expectations should be incorporated into the new programmes. For this reason the new EU Forest Strategy is timely and could provide impetus for the planning work.

#### 2.3.1.2. EU Cohesion policy support to forestry

In addition to the EAFRD, Member States and their regions can also benefit from the support of the European Regional Development Fund (ERDF) and European Social Fund (ESF) The ERDF co-finances programmes and projects that might be directly or indirectly linked to forests and the forestry sector, in the framework of measures aimed at territorial development. Some examples that can be linked to forests and the forestry area are: investments of the ERDF in Natura 2000 and the promotion of biodiversity and ecosystem services, the use of biomass as renewable energy and the support to SME's and innovation.

The ERDF co-finances cross-border, transnational and interregional cooperation programmes that can support projects which relate to forests and forestry. Projects can include the following fields of intervention: monitoring and information systems as well as networks linked to forest fires, sustainable land management, Information sharing on climate change adaptation, carbon sequestration and risk reduction, biodiversity, policies against depopulation in mountain areas, favouring of bio-energy use, cooperation for use of renewables and energy efficiency and sustainable development of regions through SMEs.

#### 2.3.1.3. Contribution from the EU Forest Strategy to rural development

The EU Forest Strategy should contribute to achieve the rural development objectives underlined above by:

- Improving the competitiveness of the forest sector and promoting the diversification of economic activity and quality of life, delivering specific environmental public goods [66];
- Assessing and improving the effect of forestry measures under rural development policy;
- Emphasising the social aspects of sustainable forest management
- Ensuring a sustainable workforce as one of the pillars for a successful implementation;
- Better valuing the benefits that forests give to society, and, through SFM, finding the right balance between delivering the various goods and services. Restoring, preserving and enhancing ecosystems dependent on forestry

### *2.3.2. Forest Protection: Environmental policy and plant health and reproductive material policy*

From the environmental policy perspective, the major policy developments since the 1998 strategy are the following:

• The development of the EU 2020 biodiversity Strategy against the background of the EU's international commitments to halt the loss of biodiversity and the degradation of ecosystem services in the EU by 2020 and in particular the different specific targets therein which are relevant to forests and forest ecosystem services;

• The EU 25 Member States (i.e. excluding Romania and Bulgaria) reported in 2008 according to the provisions of Article 17 of the Habitat Directive, on the conservation status of all the species and habitats listed in the Annexes of the Habitats Directive which occur on their territory. On the basis of this, the Commission produced a consolidated report on the conservation status of each species and habitat type at a bio geographical and EU level. These reports provide useful contextual information.[67] A new report for the period 2007-2013 will be produced in 2015 on improved scientific basis;

• The advancing implementation of the Natura 2000 legislation[68] and the inclusion of forest areas as approximately 50% of the network. This will entail work on appropriate EU funding and on cooperation between foresters and nature conservationists;

• The implementation of water and air legislation (notably the water framework[69] and national emissions ceilings directives[70]) and of the soil thematic strategy[71];

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[66] Objective of the second pillar of the Common Agricultural Policy, as reflected in Conclusions of the European Council of 7-8 February 2013 on the Multiannual Financial Framework

[67] The reports are available at: http://biodiversity.eionet.europa.eu/article17

[68] Directive 2009/147/EC of the European Parliament and of the Council of 30 November 2009 on the conservation of wild birds (codified version) and Directive 92/43/EEC of the European Parliament and of the Council of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora

[69] Directive 2000/60/EC of the European Parliament and of the Council of 23 October 2000 establishing a framework for Community action in the field of water policy

• The 6th and now 7th Environment Action Program[72]-[73] with considerable emphasis not least on the protection of natural resources;

• The adoption of the Resource Efficiency roadmap[74] which raises issues regarding how we use resources and the choices we make regarding priorities;

• The EU-wide impacts of the expected increase of forest biomass for bio-energy potentially leading to runaway developments that may threaten more climate friendly use of wood as a material;

• The upcoming invasive alien species initiative, under the 2020 Biodiversity Strategy[75];

• The Commission adopted a proposal in May 2013 for a new EU Plant reproductive material regulation[76].

• The Commission adopted a proposal in May 2013 for a new EU plant health Regulation, offering reinforced protection of trees and forests against new non-European pests[77];

• The development of the EU database of forest reproductive material containing species and artificial hybrids listed in Annex I to Council Directive 1999/105/EC, and including hyperlinks to national registers;

• The outcomes of the FLEGT Action Plan[78] which have both internal and international aspects;

• REDD/REDD +[79] issues/outcomes;

• The amendments of the EIA directive[80] on the assessment of the effects of certain public and private projects on the environment

• The SEA directive[81] on the assessment of the effects of certain plans and programmes on the environment

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[70] Directive 2001/81/EC of the European Parliament and of the Council of 23 October 2001 on national emission ceilings for certain atmospheric pollutants

[71] COM(2006) 231

[72] Decision No 1600/2002/EC of the European Parliament and of the Council of 22 July 2002 laying down the Sixth Community Environment Action Programme

[73] Proposal for a DECISION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on a General Union Environment Action Programme to 2020 "Living well, within the limits of our planet" COM(2012)710 final

[74] COM(2011) 571 final

[75] COM(2011) 244 final

[76] Reference COM(2013) 262 final: http://ec.europa.eu/dgs/health_consumer/pressroom/docs/proposal_aphp_en.pdf

[77] Reference COM(2013) 267 final: http://ec.europa.eu/dgs/health_consumer/pressroom/docs/proposal-regulation-pests-plants_en.pdf

[78] COM/2003/0251 final

[79] REDD+ refers to policy approaches and positive incentives to reduce emissions from deforestation and degradation (REDD) and to support conservation of existing forest carbon stocks, sustainable forest management and enhancement of forest carbon stocks (+) in developing countries

[80] Directive 2011/92/EU of the European Parliament and the Council of 13 December 2011 on the assessment of the effects of certain public and private projects on the environment

#### 2.3.2.1. Forest Protection

European forests are threatened by biotic and abiotic agents, such as insects and other pests, diseases, grazing and invasive alien species, windstorms, forest fires, droughts, floods and avalanches. Both the nature and the effects of certain threats are trans-boundary and therefore actions at EU level increase the added value of the measures.

The disturbances caused by these agents do have significant socioeconomic and environmental impacts and climate change effects will further exacerbate them, particularly through the increased frequency of extreme events (storms, drought, floods and temperature extremes).

Relevant policy instruments already provide support for prevention and restoration, such as for example, the EU Rural Development and regional policy measures, the EU legislation on Plant Health and Plant Reproductive Material, the Solidarity Fund, other Civil Protection Mechanisms. The use in forestry of high-quality reproductive material suited to the site in question is essential if the stability, disease-resistance, adaptation, productivity, diversity and overall resilience of forests are to be increased

The EU plant health legislation has been reviewed and a proposal for a new Regulation on protective measures against pests of plants has been adopted in May 2013. The new Regulation will offer better protection of forests against new non-European pests reaching the Union with international trade, including mandatory surveys for such pests and obligations to eradicate or contain those pests. In this context, the Commission is currently assessing the impacts of the extension of the obligation to apply within the EU the International Standard for Phytosanitary Measures nº 15 on wood packaging materials.

The EU forest reproductive material has been reviewed and a new regulation on Plant Reproductive Material (PRM) was adopted in May 2013. The new PRM regulation reinforces the principles set in the Directive 1999/105/EC on FRM: approval of well identified material on the basis of its origin, traceability as well as flexibility for operators and decrease of the administrative burden.

The Forest Strategy should ensure that under changing climatic conditions forests have enough resilience to, and are adequately protected against natural and human-induced threats so that forest cover is maintained, if not increased, forests are healthy and provisioning of all forest functions is continued. Prevention has to be priorities, rather than damage mitigation and restoration.

#### 2.3.2.2. The fight against illegal logging

Illegal logging is the harvesting of timber in contravention of the laws and regulations of the country of harvest. Illegal logging is a global problem with significant negative

[81] Directive 2001/42/EC of the European Parliament and of the Council of 27 June 2001 on the assessment of the effects of certain plans and programmes on the environment

economic, environmental and social impact. In economic terms illegal logging results in lost revenues and other foregone benefits. In environmental terms illegal logging is associated with deforestation, climate change and a loss of biodiversity. In social terms illegal logging can be linked to conflicts over land and resources, the disempowerment of local and indigenous communities, corruption and armed conflicts. Illegal activities also undermine the efforts of responsible operators by making available cheaper but illegal timber and timber products in the market place.

The European Union's policy to fight illegal logging and associated trade was defined back in 2003 with the Forest Law Enforcement Governance and Trade (FLEGT) Action Plan. The key regions and countries targeted in the FLEGT Action Plan, which together contain nearly 60% of the world's forest and supply a large proportion of internationally traded timber, are Central Africa, Russia, Tropical South America and Southeast Asia. The FLEGT Action Plan covers both supply and demand side measures to address illegal logging, and was endorsed by the EU Council of Ministers in November 2003.

The FLEGT Action Plan has led to two key pieces of legislation:

1. FLEGT Regulation[82] adopted in 2005, allowing for the control of the entry of timber to the EU from countries entering into bilateral FLEGT Voluntary Partnership Agreements (VPA) with the EU;

2. EU Timber Regulation[83] adopted in 2010, as an overarching measure to prohibit placing of illegal timber and timber products on the internal market. This regulation came into effect on 3 March 2013.

However the EU response has not been limited to legislative measures. The EU has sought to switch demand for legal and sustainable timber and timber products by encouraging both private and public sector procurement policies that give preference to legally harvested timber and timber products.

#### 2.3.2.3. Ecosystem services and biodiversity

Ecosystem services can be defined as the benefits people obtain from ecosystems. These include provisioning services such as food and water; regulating services such as flood and disease control; cultural services such as spiritual, recreational, and cultural benefits; and supporting services, such as nutrient cycling, that maintain the conditions for life on Earth[84]. Thus, they are important for the environment as well as for social and economic reasons.

Looking at the environmental side, forests are an important component of European nature. They are home to the largest number of species on the continent. The distinctive nature of European forest ecosystems is characterised by the fact that numerous species of trees, other plants or animals are restricted to Europe. 23% of the

[82] Council Regulation (EC) No 2173/2005 of 20 December 2005 on the establishment of a FLEGT licensing scheme for imports of timber into the European Community

[83] Regulation (EU) No 995/2010 of the European Parliament and of the Council of 20 October 2010 laying down the obligations of operators who place timber and timber products on the market

[84] Source: Millennium Ecosystem Assessment, 2001

total forest resource within Europe is in Natura 2000 and forests and other wooded land represent around 50% of the total terrestrial Natura 2000 network. The Natura 2000 network of protected areas is the core instrument for achieving the 2020 targets of the EU biodiversity strategy, including a significant improvement of the conservation status of habitat types and species of Community interest and where possible the restoration of a favourable conservation status. Natura 2000 sites are not strict nature reserves. They are sites where human activities such as sustainable forest management are perfectly possible, but subject to the condition that they are compatible with the conservation objectives of the respective sites. This means that in most cases normal sustainable forest management is possible without any restriction. In other cases, forest management may need to be adapted in order to avoid deterioration of protected habitats or disturbance of species. This strategy should therefore aim at further promoting the active role of forestry as an example, especially in Natura 2000 sites, of how environmental objectives and in particular nature conservation objectives can be pro-actively combined in a context of sustainable forest management.

Forests play an important role in soil protection as the leaf litter and root structures enhance soil stability again erosion or landslide: This function can be particularly relevant during extreme rainfall events.

Forests also provide multiple benefits for biodiversity and people. While some ecosystem functions, goods and services have a monetary value (e.g. wood), there are other ecosystem services which have to be ‘valued’ in other ways (e.g. recreation, cultural heritage, water and soil quality and quantity).

By better valuing, maintaining and enhancing ecosystem goods and services, the EU will provide an effective mechanism for balancing different uses while in the same time also contributing to enhance forest biodiversity.

To improve the knowledge on ecosystems and their services in the EU, Member States, with the assistance of the Commission, will map and assess the state of ecosystems and their services in their national territory by 2014, assess the economic value of such services, and promote the integration of these values into accounting and reporting systems at EU and national level by 2020.

#### 2.3.2.4. Water Policy

Forests have a key role in protecting drinking-water supplies. Forests shade snowpack, controlling the rate at which it melts, which water keeps flowing to streams, lakes and aquifers year-round. The trees also work to clean the water, filtering out pollutants and regulating the water’s temperature to keep the aquatic ecosystem in balance. This is why appropriate forest management is crucial to two important aspects of water supply: provision of high-quality water to humans and water supply to the forest itself. This fits into the aim of the Water Framework Directive (WFD) on long-term sustainable water management based on a high level of protection of the aquatic environment. Article 4.1 defines the WFD general objective to be achieved in all surface and groundwater bodies, i.e. good status by 2015, and introduces the principle of preventing any further deterioration of status.

2.3.2.5. Financial resources

For the programming period of 2000-2006 53 different LIFE+ projects dealing exclusively or mainly with forest habitats have been co-financed. The total EU contribution for these projects was 49 M€. The Nature & Biodiversity component of Life+ continues and extends the former LIFE Nature programme. It will co-finance best practice or demonstration projects that contribute to the implementation of the Birds and Habitats Directives and the Natura 2000 network as well as the Biodiversity Strategy. Taking into account that around 50% of total Natura 2000 network is on forests and other wooded land, an important number of projects was financed. The Environment Policy & Governance component co-finances innovative or pilot projects that contribute to the implementation of European environmental policy and the development of innovative policy ideas, technologies, methods and instruments. It also helps to monitor pressures (including the long-term monitoring of forests and environmental interactions) on our environment.

For the programming period of 2006-2011 there were 83 LIFE+ projects dealing with forests with a total budget of almost 209M€ of which 103M€ EU co-financing. Overall the projects covered areas such as habitat management and restoration of forests, rehabilitation and recovery of forests and forest wetlands, protection and conservation of forests, development of an EU-level Forest Monitoring System (total budget 34M€), biodiversity conservation, biotope networks, carbon monitoring and markets, forest fire prevention, climate change effects, awareness raising campaigns, specific species protection in specific forests.

2.3.2.6. Contribution from the EU Forest Strategy to forest protection

The EU Forest Strategy should contribute to forest protection by:

- Giving guidance to policy and legislative instruments and tools at EU and national level to address risk and cope with these threats, considering the range from prevention to restoration.

- Recognising the importance of, improve, make comparable and share forest information and monitoring, assessment and reporting on all the major biotic and abiotic threats building on successful experiences, such as the EU Forest Fire Information System (EFFIS), and the links made in this and other frameworks to neighbouring countries.

- Enhancing cooperation with neighbouring countries, including for the prevention of transfer of pests and diseases, and through enhanced coordination of pest- and disease-related research and for the quality of Plant Reproductive Material.

- Increasing the area of forests under active and multifunctional SFM

- Strengthening the knowledge on the state, functions and economic value of forest and of their services;

- Proposing a set of shared concepts and framework for valuation of ecosystem services, promoting their integration in accounting systems at EU and national levels by 2020, building on the Mapping and Assessment of the state of Ecosystems and of their Services (MAES);

- Recognising and strengthening the role of forests protecting water as referred to in the Water Framework Directive;

- Achieving a significant and measurable improvement in the conservation status of forest species and habitats by fully implementing nature legislation, building on the upcoming guide on Natura 2000 and forests;

- Contributing to the full implementation of Natura 2000 network by 2020, as specified in target 1 of the EU Biodiversity Strategy for 2020;

- Implementing the Strategic Plan for Biodiversity 2011-2020 and reach its Aichi targets adopted in the context of the Convention on Biological Diversity, building on the forthcoming common Restoration Prioritisation Framework;

- Delivering a measurable improvement in the conservation status of species and habitats of Community interest that depend or are affected by forestry through a greater uptake of forest management plans or equivalent instruments, as foreseen in target 3b of the EU Biodiversity Strategy;

- Strengthening forest genetics conservation in terms of tree species diversity, and diversity within species and within populations;

- Strengthening the mechanisms of protection against pests, building on increase cooperation with neighboring countries, on enhanced research and the on-going review of the Plant Health Regime;

- Supporting Mediterranean countries to protect their soil and water resources in forest areas most threatened with desertification.

### *2.3.3. Climate change*

Forests could make a significant contribution to achieving climate change mitigation objectives by absorbing carbon dioxide and storing carbon in trees and timber products. The EU land use, land use change and forestry (LULUCF) sectors remove approximately 9% of greenhouse gases emitted in other parts of the economy[85] and it provides bio-materials that can act as temporary carbon stores (harvested wood products, HWP) or as "carbon substitutes", replacing carbon intensive materials and

[85] Communication on Accounting for land use, land use change and forestry (LULUCF) in the Union's climate change commitments COM(2012)94

fuels. The Commission has adopted a decision on accounting rules for activities related to land use, land use change and forestry (LULUCF)[86]

At the same time, forests are vulnerable to climate change impacts. Droughts, fires, storms, heat waves, and biotic agents will increasingly affect their composition and their functions[87], including the provision of renewable biomass and the ability to store/sequester carbon. It is therefore of great importance to maintain and enhance the resilience and adaptive capacity of EU forests, including through fire prevention and other adaptive solutions (e.g. using reproductive material suitable to future climatic conditions). Some instruments are available under environment, rural development and research policies to promote and enhance the protection, management and use of forest resources, contributing to adaptation efforts such as:

- The EUFGIS project[88] funded by the second Community Programme on the characterisation, conservation, evaluation and utilisation of genetic resources has improved the documentation and management of dynamic conservation units of forest trees and created an online information system for forest genetic resources inventories in Europe towards sustainable forest management.
- The European Forest Fire Information System (EFFIS) supports the services in charge of the protection of forests against fires in the EU countries and provides with updated and reliable information on forest fires in Europe (see further in chapter 2.3.6).

The EU Strategy on adaptation to climate change[89], cross-sectoral by nature, also provides a short review of the expected impacts of climate change on EU forests.

Still, the exact effects of climate change on forests are complex and not yet clearly understood, calling for additional efforts both on information sharing, on knowledge generation and on dissemination to policy makers and forest users across Europe.

The use and management of forests can contribute to mitigating $CO_2$ emissions, by maintaining or enhancing their role in the carbon cycle, as well as ensure that forests are climate resilient and contribute to the development of a low carbon economy. Clear, reliable and comparable forest information would be required to balance the increased use of raw forest materials for the needs of a green economy, with the maintenance, or re-establishment of ecosystem services and forest resilience. This balance should take different scales, conditions and timeframes into account (short-term actions and long-term effects, cross border effects).

The EU is also a global forest player and its imports of food, biomass, fossil fuels, minerals and timber can contribute to drive deforestation and forest degradation (hence GHG emissions) in third countries. In this framework, relevant EU policies,

[86] Decision No 529/2013/EU of the European Parliament and of the Council on accounting rules and action plans on greenhouse gas emissions and removals resulting from activities related to land use, land use change and forestry

[87] Green paper On Forest Protection and Information in the EU: Preparing forests for climate change COM(2010)66

[88] http://www.eufgis.org/

[89] Communication on an EU Strategy on adaptation to climate change COM(2013)216

including FLEGT[90] or new REDD+[91] incentives and policy approaches could positively impact both the supply and demand sides, and become important instruments to fight deforestation and forest degradation, with a potential to deliver benefits beyond mitigation, including adaptation, biodiversity, governance and poverty reduction.

#### 2.3.3.1. Financial resources

Apart from REDD+, which is being address in chapter 2.3.9 dealing with international aspects, there are other possibilities through other instruments under climate change policy such as Emissions Trading. It is estimated that auction revenues by 2020 under the Emissions Trading Directive[92] will be around € 21,000 million. Under this Directive Member States are required to use at least 50 % of the revenues from auctioning of allowances in 9 activities, 2 of them related to forests:

- Avoid deforestation and increase afforestation and reforestation in developing countries that have ratified the international agreement on climate change;

- Carbon sequestration by forestry in the Community

#### 2.3.3.2. Contribution from the EU Forest Strategy in regard to climate change

The climate change objectives of the EU forest strategy should be to:

- - Optimise the contribution of forests, their soils and their products to climate change mitigation, also considering a cascading use of wood, carbon accounting under LULUCF as well as to ecosystem-based adaptation;
- - Optimise the capacity of EU forests to adapt to climate change, building on the actions proposed in the EU Strategy on Adaptation to Climate Change, such as bridging knowledge gaps, mainstreaming adaptation action in forest policies, and using LIFE+ funding opportunities. It can in particular build on the actions proposed under the EU Strategy on adaptation to climate change, on bridging knowledge gaps, mainstreaming adaptation action in forest policies, and on the use of LIFE+ funding opportunities for forest-related demonstration projects.

[90] EU Action Plan on Forest Law, Enforcement, Governance and Trade

[91] Policy approaches and positive incentives on issues relating to reducing emissions from deforestation and forest degradation in developing countries; and the role of conservation, sustainable management of
forests and enhancement of forest carbon stocks in developing countries

[92] Directive 2009/29/EC of the European Parliament and of the Council of 23 April 2009 amending Directive 2003/87/EC so as to improve and extend the greenhouse gas emission allowance trading scheme of the Community

The implementation of the forest strategy will address policy guidance to optimise forests contribution to mitigation and ecosystem based adaptation, while taking into account local, national, regional and global circumstances. It will consider:

- An initiative to explore and promote as appropriate the use of renewable harvested wood products as a sustainable and climate friendly material, also considering substitution effects;
- Further work on sustainability criteria for the use of forest biomass;
- Further work on adaptation to climate change for EU forests, in particular ecosystem based adaptation;
- Further work on the potential of the EU market and of EU policies on resource efficiency to reduce the human pressure on global forests that results in greenhouse gas emissions, including actions to address the drivers of deforestation.

### *2.3.4. Promoting competitive and sustainable supply of wood for the EU bioeconomy*

The forest sector has all the attributes to take a major role in the European green economy, through exemplary sustainable management, including the development and application of ecosystem services principles, renewable energy use linked to an innovative forest industry developing intelligent bio-based products, more efficient and environmentally sound processing technologies. The natural, renewable and recyclable characteristic of wood makes its sustainable use environment and climate-friendly, positive for the society and for the low carbon economy, provided that limits to what forests can sustainably supply are respected, that the use of wood effectively contributes to climate change mitigation and that products are only sourced from sustainable forest management. Moreover non wood forest products are gaining higher interests in the markets.

Forest biomass as a source of bioenergy provides to rural communities an opportunity to create sustainable new jobs and to diversify income. The Biomass Action Plan[93] overviewed and set out measures to increase the development of biomass energy from wood, wastes and agricultural crops. The proportion of wood based energy currently is about 5 % of total EU energy supply. According to National Renewable Energy Action Plans it is expected that biomass will represent more than 10 % of the EU gross final energy consumption by 2020. In this context forestry biomass is set to play a significant role. Some Member States have already started an essential change of energy systems. More mobilisation of potential woody biomass resources for energy purposes will be required as demand grows, but it is extremely important that the biomass for energy purposes comes from forests that are sustainably managed. Renewable energy from forest sources is in itself an important contribution to the wider ‘green economy’.

[93] COM(2005) 628 final Biomass action plan

Forest biomass can be an opportunity for rural communities to create sustainable new jobs, to diversify income and to contribute to rural development.

However, production of environmentally sound and cost competitive bioenergy is the outcome of a mix of policy considerations (area of forests and crops, amount of available biomass, climate change, biodiversity, and impact on soil nutrient, water balance, greenhouse gas savings) as well as qualitative abilities (energy conversion, wood use, market issues, commitments, achievement, socio-economic environment, climate change mitigation). This contribution of EU forests is to go hand in hand with other functions to be delivered, as the result of other commitments (halt the loss of biodiversity by 2020, achieve good water status, for example). Cross-linkages with agricultural and waste biomass must be also considered. Thus, bioenergy should be assessed with broader perspective taking into account complex benefits, impacts and constraints.

Cascade use of wood

Resource efficiency for the forest sector means using forest resources in a way that minimise impacts on the environment and climate, prioritise the forest outputs that add higher added value, create more jobs and contribute to a better carbon balance. Cascade use of wood fulfils these criteria. Under the cascade principle, wood should be used in the following order of priority:

1. wood-based products
2. re-use
3. recycling
4. bio-energy
5. disposal

This principle should be applied when possible. However, in some cases, different approaches may be necessary, for example in cases of changing demand or environmental protection. For instance, it is sometimes necessary to remove biomass to prevent forest fires, which is in that case often used for bio-energy.

The projected high demand for forest products and services gives opportunities for growth in the forest sector, as well as multiplier effects for related businesses, offering green jobs, especially in rural areas. However, the impact of EU wood consumption on imports as well as EU carbon footprint should be carefully considered. It is important to establish effective mechanisms to ensure that supply is sustainable. The sustainable potential of home-grown resources should be optimised in accord with the principles of SFM.

#### 2.3.4.1. Financial resources

The Intelligent Energy – Europe (IEE) Programme aims at supporting the development of renewable energy including forest bioenergy and ensuring its sustainability. 36 projects in bioenergy sector have received support under IEE II to develop supply chains for solid biomass, liquid biofuels and biogas, or to provide important inputs to the elaboration of European, national and regional strategies for sustainable exploitation of bio-resources, including forestry, agricultural, industrial and municipal wastes. In the forestry sector, projects seek to increase the production and use of energy from wood biomass, by mobilising untapped potentials, transferring knowledge and bringing together potential suppliers and consumers. The total contribution has been estimated at around €15 million for the period 2006-2012.

#### 2.3.4.2. Contribution from the EU Forest Strategy to promotion of a competitive and sustainable supply of wood for the EU bioeconomy

In this framework, the objective at EU level for forests should be:

- To establish the forest sector as the lead force driving the development of Europe's green economy, to increase the potential and to maximise the contribution of forests and the forest sector, to Europe's green economy including the provision of both wood material, cork and other non-wood products and services and to be at the forefront of rural development, and the creation of sustainable employment and jobs in rural areas.

- To enhance the economic vitality and competitiveness of existing production, ensuring a well-functioning internal market with level playing field, and to stimulate and make enabling conditions for new bio-based products and services, creating synergies with the EU Bioeconomy Strategy.

- Enhance the development of wood-based energy products and environmentally sound technologies

- Ensure that use of forest biomass and derived products is guided by consistent requirements of sustainability and efficiency, and that those sustainability principles are being properly enforced globally.

- Ensure that increased EU consumption of biomass does not add to global deforestation levels by ensuring that global forest protection safeguards are robust enough to cope with the added level of demand on timber markets.

- To pursue EU policies and international cooperation to:
    - reduce and eliminate illegal logging (FLEGT VPAs and Timber Regulation);
    - improve/increase public procurement of sustainable products (building upon the Report to the SFC on public procurement of wood and wood based products);
    - recognise and support of the role of harvested wood products in the carbon stock and to substitute other less climate or less environmental friendly (high energy cost) materials.

The EU Forest Strategy should contribute by:

- Assessing the potential for the mobilisation and use of sustainably produced forest biomass for energy and ensure that it takes place according to the guiding principles of this strategy (SFM, multi-functionality and resource efficiency);
- Affirming the EU commitment to the principles of sustainable forest management (SFM) as defined by Forest Europe and its tools to proof and document it, building on existing monitoring and verification systems.
- Encouraging an increase in the area of sustainably managed forests in the EU, including incentivising the development and use of forest management plans or equivalent instruments as a tool to address the different demands on, and multifunctional role of forests.
- Developing in close cooperation with the Standing Forestry Committee (SFC), objective, ambitious and demonstrable EU SFM criteria that can be applied regardless of the end use of forest biomass.
- Ensuring that the tools used to enhance and demonstrate the sustainability of forest management and environmentally sound production processes are guaranteeing fair competition and a level playing field with other resource-based sectors.
- Promoting sustainable production and consumption of forest based products and services.
- Facilitate increasing mobilisation of sustainably produced wood for all uses to the full sustainable potential.
- Contribute to promote wood based products and constructing with wood.
- Contribute to improving the competitiveness of the forest sector.
- Assist the development of producer groups.
- Consider possible targets to be further specified to translate these objectives in reality regarding the sustainability of forest management within the EU, sustainable production and consumption and resource efficiency

### *2.3.5. Research and innovation*

A coherent and ambitious European forest-based research area is a primary pillar for the implementation of the EU Forest strategy. Forest research has some specificities such as long timeframes and difficulties for transferability of results due to bio geographical diversity.

As mentioned in earlier chapters, we live in a changing environment with increasingly complex interlinked relationships between climate, biodiversity, society and the economy. These relationships are multi-scalar at global, regional and local levels. On the other hand, there are more and more multifunctional demands on and expectations of forest resources which pose a significant challenge for their sustainable management. The contribution from research and innovation is key to overcome these challenges. Thus, research and innovation are considered as one of the main pillars of the future forest strategy.

The objective under Horizon 2020 related to forestry is to ensure the long-term sustainability of the sector research in a series of areas is necessary including dealing with pests and diseases and climate change, the development of wood products and biomass, the implementation of adequate production practices and systems. Adequate socio-economic analysis and foresight exercises are also necessary to ensure that contributions of the sector to the rural economy and society at large are well understood and catered for.

While European forest research is internationally recognised in certain scientific areas (genetics, forest risks, etc.) it is also fragmented, often mono-disciplinary and unevenly distributed, and duplication may also occur. It is important that efforts from Member States, stakeholders and the EU go into the same direction. For strengthening the coordination between EU and Member States different instruments can be considered such as COST, ERA-Nets, a Joint Programming Initiative (JPI), or an Article 185 Initiative[94]. The Forest-based Technology Platform is also contributing to the coordination of research efforts by owners and industries, the European Commission and Member States, and should play a significant role in strengthening the sector's innovative capacity.

To maximise research efforts both Commission and Member States should put further emphasis on dissemination of results and the exchange of best practices.

Increase in innovation in the sector can contribute to assist countries to recover from the economic crisis and boost their economies in terms of growth and jobs, in particular in rural areas. Research in business/economic development and financial aspects to achieve the optimum path towards developing a successful competitive forest sector is also essential. Through the European Innovation Partnership on Agricultural Productivity and Sustainability[95], actions could be undertaken to push the technological transfer from science to forest practice, providing more systematic feedback about practical needs from forest to science, and fostering a competitive forest sector that achieves more from less and works in harmony with the environment. The EIP on Raw materials[96] will contribute to innovative solutions with a view to increasing the availability of raw materials for Europe, including wood.

The objectives at EU level for forest-related research and innovation under Horizon 2020 are to address the priorities of the EU Forest and Bioeconomy strategies. There will be some focus on the coordination of transdisciplinary research, product innovation and production methodology through: well-coordinated national research and innovation programmes and priorities; excellent and coordinated research institutions; and new joint facilities and Pan-European networks of large-scale infrastructures with long-term funding. Increasing innovation and enterprise development in the sector will support growth and jobs, in particular in rural areas.

[94] Article 185 of the Treaty of Lisbon enables the Community to participate in new joint research programmes
undertaken by several Member states, as well as to participate in the dedicated implementation structures

[95] COM(2012)79 final

[96] COM(2012) 82 final

2.3.5.1. Financial resources

The EU framework programmes for research and technological development have included actions in support of the forest sector. There has been a considerable increase in the 7th Framework Programme and Horizon 2020.

The EU framework programmes for research and technological development have included actions in support of the forest sector. There has been a considerable increase in the 7th Framework Programme (FP7) And Horizon 2020.

Until now 5,027 projects linked to forests, forestry and the forest sector have been funded by all EU Research programmes combined. Of this, 745 have been funded under FP7. Around €275 million have been spent in forest related projects under FP7. According to an assessment of the Forest-based Sector Technology Platform, EU funds represent around 20% of total funds for R&I in the sector with the remaining part coming from Member States and the private sector. Indicatively, under Horizon 2020 (2014-2020), the Commission proposed to allocate some €4,152 million to the societal challenge entitled "Food security, sustainable agriculture, marine and maritime research and the bio-economy" which includes forest research.

In addition to this, the COUNCIL REGULATION (EC) No 870/2004 of 24 April 2004 (which repealed Regulation (EC) No 1467/94) established a Community programme on the conservation, characterisation, collection and utilisation of genetic resources in agriculture. It promotes genetic diversity and the exchange of information including close co-ordination between Member States and between the Member States and the European Commission for the conservation and sustainable use of genetic resources in agriculture. It also facilitates co-ordination in the field of international undertakings on genetic resources, in particular within the Convention on Biological Diversity, the International Treaty on Plant Genetic Resources for Food and Agriculture and the FAO's Global Plan of Action for the Conservation and Sustainable Utilisation of Plant Genetic Resources for Food and Agriculture. The budget allocated to this programme, which complemented the actions co-funded by the Rural Development Regulation amounted to €10 million. The programme supported 17 actions dedicated to plant and animal genetic resources. These actions were implemented by around 180 partners located in 25 Member States and 12 non-EU countries. The actions started during 2007 with durations of up to 4 years. One of the actions was the project EUFGIS, which focused on forest genetic resources[97]. The total budget for EUFGIS was €1,1million with DG AGRI co-funding 50%.

2.3.5.2. Contribution from the EU Forest Strategy to research and innovation

The objectives of the EU forest strategy for research and innovation should be to:

- Stress the necessary contribution from research and innovation to achieve the interlinked priorities and provide the necessary support through the relevant instruments and, in particular, Horizon 2020;

[97] See more on: http://www.eufgis.org

- Strengthen the necessary contribution from research and innovation to provide support on the conservation of species diversity as well as diversity within tree and woody shrub, as well as endangered genetic resources, in order to utilise forest genetic resources in a sustainable way, to restore viable populations of endangered species as well as to contribute to the conservation of diverse forest ecosystems;

- Strengthen the necessary contribution from research and innovation to provide support on the ability of forest ecosystem to react to damaging biotic and abiotic factors (resistance towards pests or pollutants ) at three level, diversity of trees species, diversity within trees species and diversity within populations;

- Push for technological and knowledge transfer from science to forest practice, in particular through the European Innovation Partnership on Agricultural Productivity and Sustainability where forestry is included and where several actions could be undertaken;

- Strengthen the coordination between EU and Member States as well as stakeholders, facilitating that research and innovation efforts go into the same direction. The Standing Committee on Agricultural Research (SCAR) can play a significant role in this respect;

- Put further emphasis on dissemination of results and the exchange of good practices using the EU forest governance structure and other relevant fora.

### *2.3.6. Forest information and monitoring*

Harmonized information on forests and forest resources at EU level is still limited, notwithstanding important research efforts in this field[98]. For instance, readily harmonized information on forest health and vitality and forest damage is lacking. It should be noticed that a mere increase in forest area at national or European level provides little information on the condition of the forests regarding forest biodiversity, forest condition, forest damage or fragmentation.

The lack of a comprehensive European Forest Information System prevents an accurate assessment of the state of forest resources at the European level. Global studies such as the FAO Global Forest Resources Assessment, or European assessments such as the "State of Europe's Forests" provide a compendium of the main characteristics of European forests at national level; Although the work on harmonization of information from national forest inventories has been on-going for a number of years, the level of harmonization on this information is still limited[99].

[98] For more information, see the COST E43 project on NFI harmonisation: Web page: http://www.metla.fi/eu/cost/e43/

[99] For more information, see the COST E43 project on NFI harmonisation: Web page: http://www.metla.fi/eu/cost/e43/

The trans-boundary nature of the landscape requires the availability of trans-national forest information for the analysis of effects of e.g. climate change, biotic (pests) and abiotic damages (fires, storms). Thus cooperation between national/regional forest services and European services is essential to guarantee the sustainable provision of goods and services from European forests. The European Commission has been working closely with these services to attain a wide coverage of harmonized information for the most relevant forest parameters such as forest area, growing stock, biomass, forest damages, etc. Since the gathering of European wide forest information may be a long process, in the meantime, large-scale approaches are being implemented by the EC for an initial spatial assessment of forest area, forest spatial pattern and fragmentation, and forest biomass (JRC Forest Map, JRC Forest Spatial Pattern, JRC Forest Biomass). Additionally, the European Forest Fire Information system, which currently provides comprehensive assessment of forest fire regimes and damages in Europe, is being complemented with a dedicated module aiming at the assessment of forest damages overall, including biotic (pests) and abiotic (wind/snow storms) damages. Forest monitoring for pests should be coordinated with the new EU plant health legislation, which also targets forest pests. Lastly the Forest Reproductive Material database, which currently provides a summary on FRM listed in national registers, is being complemented with hyperlinks to national registers of FRM and maps for the localisation of seed zones.

The Green Paper on forest protection and information in the EU[100] described the impacts that forests have to face due to climate change and the environmental, social and economic challenges that result from them. This led to renewed interest in a more comprehensive EU forest information system based on data collected by Member States, to take the knowledge base on forests forward so that both the Member States' and the EU's forest related policies and actions can be guided by relevant up to date knowledge. This view was shared by the Council conclusions[101] of June 2010, stakeholder inputs in the public consultation during the summer of 2010 and the report from the European Parliament of 2011[102].

The Council noted the trans-boundary nature and effects of certain forest-related phenomena and threats, such as pest outbreaks, forest fires or storms, at EU level and on a wider scale. The Council recognized the need for adequate information to identify threats to forests and challenges and shortcomings of existing policies and instruments at national and EU level. It also underlined the need for the continuous assessment and monitoring of the state, dynamics and evolution of European forests, highlighting the role of National Forest Inventory Systems and pan-European initiatives.

The European Parliament stressed that measures for forest protection would have to reflect the cross-border nature of biotic and abiotic threats, according to their type, bioclimatic zone and regional conditions. It also mentioned that action to support, coordinate and supplement policy initiatives by the Member States and regions should be taken where the EU can deliver added value. The EP considered that long-term forest protection depends upon establishing or sustaining forest ecosystems with

[100] COM(2010)66 final of 1.3.2010, SEC(2010)163 final
[101] http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/envir/115113.pdf
[102] http://ec.europa.eu/environment/forests/pdf/opinion_eur_parl.pdf

highly diverse tree composition, age and structure. It stressed the need for collection and dissemination of relevant, harmonised and comparable data on forest cover, biodiversity, biotic and abiotic threats and land use in the context of the UNFCCC, CBD and environmental accounts. It also argued for enhancement of coordination and information efforts with regard to forest protection and called on the Commission to compile and monitor indicators relating to the protective functions of forests such as soil retention and water capacity.

As a follow-up action, the Commission chaired an ad hoc working group of Member States and stakeholder forest information experts appointed by the Standing Forestry Committee, resulting in a report[103] that reviews the actual state of forest information in the EU, sums up stakeholder interests, summarizes priorities for EU level harmonization of certain forest parameters and lays out policy options.

Recently, the Commission proposed to the Member States the development of a European Forest Information System in a modular manner, following the recommendations provided by the SFC ad-hoc working group on Forest Information.

Thanks to a €1 million budget voted by the European Parliament the Commission is carrying out a Preparatory Action on harmonized forest information in Europe. The action is based on Commission Decision C(2012)3716 of 8 June 2012 and it will be implemented by the Joint Research Centre in close collaboration with interested Institutions from Member States such as National Forest Inventories. Considering the priorities identified by the working group, it aims at:

- enhancing the collection of forest information building, on existing information systems in the countries, including on Forest reproductive material;
- further developing an European framework for comparable and harmonized forest information collected by the countries;
- defining modalities for the collection and processing of data sets and
- serving as a basis for the provision of policy relevant forest information in the EU as required under international obligations.

Priority will be given to:

1. Using national forest inventories (NFI) data to estimate biomass and carbon stocks in European forests. The aim is to propose and use a harmonized approach for the assessment of forest biomass. The information collected by the NFIs, such as tree data (dbh, basal area, tree height, species, growing stock, volume increment) and stand volume should be converted into biomass and biomass increment. The data provided should be as harmonized as possible in space and time among the countries and should describe the same metric, e.g. forest living biomass in tons or tons/ha.
2. Assessing the conservation status of forest habitats and the ecological coherence of the NATURA 2000 sites. This will include assessments of threats to the favorable conservation status of forest habitats, such as fires or

[103] http://ec.europa.eu/environment/forests/pdf/Fin%20report%20info%20monit%20wg.pdf

pests. Landscape elements outside NATURA 2000 will be considered, since biodiversity conservation must go beyond protected areas boundaries.

3. A scenario modeling with the European Forest Dynamics Model (EFDM) with the aim to test the performance of the model and to further develop the existing prototype. Improvements of the EFDM encompass, inter alia, a listing of all forest management activities and disturbances inclusion in the model, getting graphs, tables and statistics, modeling of uneven aged forests.

In addition, the European Forest Fire Information System (EFFIS), the only existing EU level forest information tool, will continue monitoring forest fires. It has been in operation since 2000 and allows participating Member States and neighbouring countries to convey data on fire occurrence into a central database managed by the JRC. EFFIS also produces daily fire danger forecasts and fire damage assessments based on GIS and remote sensing data.

The EFFIS model overcomes the traditional gap between reluctance to have formal commitments regarding forests at EU level and the equally recognised need to ensure EU forests are delivering on broader policy objectives. It is a very practical and flexible tool. EFFIS feeds the European Forest Data Centre (EFDAC), a more comprehensive umbrella structure also operated by JRC, to which more modules concerning other forest parameters can be added if Member States agree on providing the relevant information from their forest inventory and/or monitoring work. EFDAC is based on the collaboration with a network of experts nominated by the members of the SFC. It is planned to gradually be developed towards a EU Forest Information System.

In this way, future forest information work would help to improve the level of forest protection and the contribution of forests to environmental and economic objectives, including biodiversity conservation as well as efficient use of the EU's resources, notably through integration of such actions into the new Forest Strategy.

The Commission launched several studies on forest dieback, on the impacts of storms, on the influence of weather driven patterns in general, on biotic agents affecting forests, on socio-economics in relation on forest fires, on a new EU forest fire classification system, etc.

### *2.3.7. International aspects*

#### 2.3.7.1. Pan-European Dimension

***Forest Europe***

Forest Europe, formerly known as MCPFE (Ministerial Conference for the Protection of Forests in Europe) has 47 signatories to the Forest Europe process; 46 states plus

the European Union. States include EU Member States plus others in the pan-European area, stretching from Iceland to the Russian Federation. There are also observers from other non-European countries, stakeholders and international organisations.

The main aim of all participants working together in this process is to further develop a common understanding regarding the protection and the sustainable management of forests in Europe and it addresses common threats and opportunities related to forests and forestry.

This process is based on Ministerial Conferences (Strasbourg 1990, Helsinki 1993, Lisbon 1998, Vienna 2003, Warsaw 2007 and Oslo 2011), at which ministerial declarations, resolutions and decisions are adopted. The discussion and work between the conferences, which is called the "Forest Europe Process", has focussed on monitoring and on national level implementation.

The European Union has signed all "Forest Europe" ministerial declarations, resolutions and decisions. As a signatory, the EU is directly involved in the follow-up and implementation of the Resolutions. In 2010, the Commission submitted to the Forest Europe Liaison Unit a report concerning progress on the implementation at EU level of the Forest Europe declarations and resolutions during the period 2007–2010. The report highlights the contribution of EU policies and measures to the implementation of the Forest Europe ministerial commitments at EU level[104].

***Towards a Legally Binding Agreement on Forests***

At the most recent Forest Europe Ministerial Conference held in Oslo in June 2011, ministers responsible for forests decided on the elaboration of a legally binding agreement on forests in Europe and established an Intergovernmental Negotiating Committee with the mandate to develop such an agreement.

According to the provisions of the Oslo Mandate, the Committee has the goal of completing its tasks by 30 June 2013. The Committee will present its results to an extraordinary Forest Europe Ministerial Conference that will take place within six months of the conclusion of the negotiations for consideration, possible adoption and opening for signature.

The Committee aims to develop a holistic legally binding framework agreement for forests, to address, inter alia, sustainable forest management (SFM) in Europe and the multi-functionality of forests, ensuring the long-term provision of a broad range of goods, products and forest ecosystem services. A list of possible subjects to be addressed by the agreement is specified in the Oslo Mandate.

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[104] Included into the Forest Europe publication "Implementation of the FOREST EUROPE Commitments - National and Pan-European Actions 2008-2011" available at: http://www.foresteurope.org/

The Intergovernmental Negotiating Committee (INC) is to develop a holistic legally binding framework agreement for forests, to address, inter alia, the following possible subjects:

a. To ensure sustainable forest management in Europe and the long-term provision of a broad range of goods and forest ecosystem services;

b. To maintain and enhance forest resources in Europe, their health, vitality and resilience, and their adaptation to climate change;

c. To increase the resilience of forests to natural hazards and to protect forest against human-induced threats;

d. To enhance the contributions of forests to the mitigation of climate change;

e. To maintain and enhance the protective and productive potential of European forests;

f. To halt the loss of forest biodiversity in Europe and combat desertification;

g. To create and maintain enabling conditions for European forests to contribute to a green economy, employment and the development of rural and urban areas;

h. To maintain and enhance the cultural and social functions of forests in Europe;

i. To reduce, with the aim of eliminating, illegal logging and associated trade in timber and timber products;

j. To improve the forest knowledge base through research, education, information sharing and communication;

k. To enhance participation and cooperation on forests at local, national, regional and global levels;

Participation in the INC is open to the 46 European States and the European Union, signatories to Forest Europe. Over thirty international and intergovernmental organisations, NGOs as well as one country hold an observer status to the Committee. The Chair and the Bureau facilitate the work of the Committee and guide the Secretariat in providing necessary service to the negotiations.

Co-negotiators on behalf of the EU, as a party to the INC, are the Member State in charge of the Presidency in the Council and the European Commission (represented by DG Agriculture and Rural Development). The EU and its Member States participate in these negotiations based on the two decisions adopted in the Council on 7 June 2011:

- Decision of the representatives of the Governments of the Member States, meeting within the Council, authorising the Presidency of the Council to negotiate, on behalf of the Member States, the provisions of a legally binding

agreement on forests in Europe that fall within the competences of the Member States[105] and

- Council Decision on the participation of the European Union in negotiations on a legally binding agreement on forests in Europe[106].

Both decisions include negotiating directives for the Commission and the Presidency, supplemented by the Practical Arrangements for the negotiations, the latter adopted in the Council Working Party on Forests in advance of each session of the INC.

Despite on-going discussions on detail, there is a consensus that the LBA will enshrine the principles of SFM and the multi-functionality of forests.

The meeting of INC4 took place in Warsaw in June 2013.

The development of the New EU Forest Strategy has fully taken into account the current negotiations on a future Legally Binding Agreement on Forests, and implementation will be addressed within the follow up process of the Strategy that will take account of the finally agreed LBA's provisions.

2.3.7.2. Global Dimension

***World forests***

Forests cover roughly 30% of the world's land area and deliver a multitude of economic and social benefits. They offer major environmental benefits related to ecosystem services, biological diversity and climate change. Tropical forests are amongst the most important habitats for biodiversity and provide crucial eco-system services such as water purification and erosion prevention. The forestry sector is a main contributor to the economy of many countries; among which developing countries. The livelihoods of 1.6 billion people depend on forest resources to some extent and 60 million indigenous people depend directly on forests for their survival. Forest have a significant cultural and social value for many communities. Forests also store significant amounts of CO2, thus preventing further increases in concentrations of greenhouse gases in the atmosphere.

Forests are under threat from deforestation and degradation. According to FAO Forest Resources Assessment, the global rate of deforestation shows sign of decreasing but is still alarmingly high estimates: around 13 million ha of forest were converted to other uses or lost through natural causes each year in the last decade compared with 16 million ha per year in the 1990s. Most of the deforestation takes place in tropical regions in developing countries. Deforestation accounts for some 20% of global carbon dioxide ($CO_2$) emissions (IPCC, 2007), more than total EU greenhouse gas emissions. Reducing emissions from deforestation will therefore be essential in order to achieve the objective of limiting global warming to 2 degrees Centigrade. It is also

[105] 2011/712/EU
[106] COM (2011) 177 final

a cost-effective way to combat climate change. Protecting forests will have additional benefits for biodiversity and for the livelihoods of the poor.

***The EU and international forest policies***

At the global level, the EU is at the frontline of efforts aimed at combating deforestation and promoting implementation of Sustainable Forest Management (SFM) as a mean to protect global biodiversity and respond to climate change, while at the same time ensuring a continued delivery of forest ecosystem goods and services that contribute to sustainable development and poverty reduction. To this end, the EU and its Member States are key players in several international fora and multilateral environmental agreements that deal directly or indirectly with matters related to forests and determine the international forest governance regime. On broad horizontal issues, the EU and its Member States are actively engaged in the on-going processes related to the Rio+20 follow-up which will lead by 2015 to a new institutional framework for sustainable development (strengthened UNEP, establishment of a High-level Political Forum on Sustainable Development, Sustainable Development Goals and new post-2015 development agenda) where the role of forests in sustainable development and green economy will have to be fully recognized. The EU and its Member States are also negotiating matters related to forests in the framework of the UN Forum on Forest (UNFF)/Non-Legally Binding Instruments on all type of Forests (NLBI), the UN Framework Convention on Climate Change (UNFCCC), the Convention on Biological Diversity (CBD), and the UN Convention to Combat Desertification (UNCCD). The year 2015 represents a significant milestone for a number of these processes, particularly considering the scheduled review of the International Arrangement on Forests at UNFF11, the expected conclusion of the negotiations for a post-2020 climate agreement in the context of the UNFCCC, and the convergence of SDGs and post-2015 development agenda.

The EU and its Member States are also active in the OECD scheme for the certification of forest reproductive material which aims to encourage the production and use of forest tree seeds or plants that have been collected, processed, raised, labelled and distributed in a manner that ensures their trueness to name. This 'certified' material is intended for use in a variety of forestry functions, including timber production, soil protection and environmental criteria. The scheme is open to OECD Members as well as to other States. To date 25 participating countries (15 Member States and Croatia) implement the Scheme, including tropical countries which are developing their seed exchange for reforestation purposes.

In the absence of a single multilateral legal agreement, international policy dialogue and cooperation on forests are promoted through a complex architecture of different multilateral and regional agreements, institutions, programmes and initiatives which reflect the multiple values of forests and their contribution across the three pillars of sustainable development. The United Nations Forum on Forests (UNFF)[107],

[107] In October 2000, the Economic and Social Council of the United Nations (ECOSOC), through its Resolution 2000/35, established the United Nations Forum on Forests (UNFF) as a subsidiary body with the main objective to promote "the management, conservation and sustainable development of all types of forests and to strengthen long-term political commitment to this end". In April 2001, following

established in 2000 as a subsidiary body of the UN Economic and Social Council (ECOSOC) as part of a new international arrangement on forests, plays a vital role in addressing forest-related issues in a holistic and integrated manner, and promoting international policy coordination and cooperation to achieve sustainable forest management[108]. The EU and its Member States are actively engaged in the UNFF and have subscribed to the Non-Legally Binding Instruments on all type of Forests (NLBI), adopted by the Forum in 2007, with the objective of: (a) strengthening political commitment and action at all levels to implement effectively sustainable management of all types of forests and to achieve the shared global objectives on forests[109]; (b) enhancing the contribution of forests to the achievement of the internationally agreed development goals; and (c) providing a framework for national action and international cooperation.

Forests are also an integral part of discussions and deliberations under other international fora, including multilateral environmental agreements such as the UN Framework Convention on Climate Change (UNFCCC), the Convention on Biological Diversity (CBD), and the UN Convention to Combat Desertification (UNCCD) where important decisions are being taken on forest-related matters such as REDD+[110], biodiversity and protected areas management and financing, sustainable land management. The EU is also an active member of the International Tropical Timber Organization (ITTO)[111], an intergovernmental organization promoting the conservation and sustainable management, use and trade of tropical forest resources. The ITTO members represent about 80% of the world's tropical forests and 90% of the global tropical timber trade.

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the recommendation of ECOSOC, the Collaborative Partnership on Forests (CPF), partnership of 14 major forest-related international organizations, institutions and convention secretariats, was created to support the work of the UNFF and its member countries and to foster increased cooperation and coordination on forests.

[108] A/RES/66/288, "The future we want, Outcome of the UNCSD 2012 (Rio+20), United Nations Conference on Sustainable Development, Resolution adopted by the UN General Assembly.

[109] In 2006, at its sixth session, the UN Forum on Forests agreed on four shared Global Objectives on Forests, providing clear guidance on the future work of the international arrangement on forests. The four Global Objectives, which have been integrated in 2007 in the Non Legally-Binding Instrument on all type of Forests seek to:

1. Reverse the loss of forest cover worldwide through sustainable forest management (SFM), including protection, restoration, afforestation and reforestation, and increase efforts to prevent forest degradation;
2. Enhance forest-based economic, social and environmental benefits, including by improving the livelihoods of forest-dependent people;
3. Increase significantly the area of sustainably managed forests, including protected forests, and increase the proportion of forest products derived from sustainably managed forests; and
4. Reverse the decline in official development assistance for sustainable forest management and mobilize significantly-increased new and additional financial resources from all sources for the implementation of SFM.

[110] REDD+: Reducing Emissions from Deforestation and Forest Degradation and the role of conservation, sustainable management of forests and enhancement of forest carbon stocks in developing countries.

[111] The latest International Tropical Timber Agreement, the ITTA, 2006 entered into force on December 7, 2011.

On broad horizontal issues which have far reaching implications for the international forest governance, the EU and its Member States are actively engaged in the on-going processes related to the Rio+20 follow-up which will lead by 2015 to a new overarching framework for sustainable development. These processes include in particular the strengthening of UNEP, the creation of a High-Level Political Forum on sustainable development that will replace the UN Conference on Sustainable Development (UNCSD), the elaboration of a set of SDGs that will be fully integrated in the post-2015 development agenda and a strategy for Sustainable Development Financing. The role of forests in sustainable development and green economy will have to be fully recognized and adequately reflected in this new framework.

In 2015 the international community will review the effectiveness of the International Arrangement on Forests and consider future options. This crucial milestone will overlap with several other international processes with far reaching implications on forests such as the Rio+20 follow up, ., the expected conclusion of the negotiations for a post-2020 climate agreement in the context of the UNFCCC, and the convergence of SDGs and post-2015 development agenda. The interconnections and synergies amongst these different processes require that the EU and its Member States ensure a coherent and integrated approach across different multilateral fora.

### *Official Development Aid*

The EU also continues to be the driving force in mobilising international support for development: it is the largest aid donor, accounting for the half of global Official Development Assistance (ODA) to developing countries, the largest and most open market for developing countries and is at the forefront promoting the three dimensions of sustainable development[112]. The EU is helping developing countries to devise an inclusive approach to address all elements of sustainable development including social development, economic growth and environmental protection.

The EU Development policy[113] recognizes the central importance of the sustainable management of natural resources, including forests, for development and poverty reduction.

It highlights promotion of a 'green economy' that can generate growth, create jobs and help reduce poverty by valuing and investing in natural capital. It should also contribute to improving the resilience of developing countries to the consequences of climate change. More precisely, the EU should scale up its support for oversight processes and bodies and continue to back governance reforms that promote the sustainable and transparent management of natural resources, including raw materials and maritime resources, and ecosystem services, with particular attention to the dependence of the poor on them, especially smallholder farms.

[112] COM(2012)366: Improving EU support to developing countries in mobilising Financing for Development.

[113]COM(2011) 637 final: Increasing the impact of EU Development Policy: an Agenda for Change

At the core of the proposed EU response is the objective supported by the EU Council to halt global forest cover loss by 2030 at the latest and to reduce gross tropical deforestation by at least 50 % by 2020 compared to current levels.[114]

The EU has been providing support to developing countries for improving forest governance, promoting sustainable forest management and the conservation of forest ecosystems and for addressing the drivers of deforestation and forest degradation. From 2000 to 2012, the EU has contributed over 1 billion euro to partner countries for forest projects and programmes from the EU budget and the European Development Fund. Recent years saw a rapid increase of Commitments and pledges for REDD+ activities by EU Member States and the EU budget, that amount to 1.5 billion euro for the period 2010-2012.

The EU Official Development Assistance also contributes to address the drivers of deforestation and forest degradation through supporting initiatives in other sectors , including promoting good governance of the environment and natural resources, strengthening the rule of law, promoting sustainable agriculture including agroforestry, and better land management, promoting access to renewable (non-biomass) energy, etc…

The EU is also providing support and tools to governments and partner institutions in developing countries for the monitoring of forest ecosystems and a better understanding of the interactions between development, environment, and security issues. Through the Joint Research Center, the EU contributes to mapping and measuring changes in forest resources in Africa and other tropical countries, improving the characterisation of land cover/use in partner countries, to documenting the quality of high biodiversity regions and to assessing the level of threats from human activities (agriculture, logging, fires).

### *FLEGT and REDD+*

Illegal logging has a devastating impact on some of the world's most valuable remaining forests. Its environmental effects include deforestation, the loss of biodiversity and the emission of greenhouse gases. Its direct impacts on people include conflicts with indigenous and local populations, violence and human rights abuses, the fuelling of corruption and exacerbation of poverty. The World Bank has estimated that the governments of some of the poorest countries in the world lose over $ 15 billion per year as a result of illegal logging – money that should be spent improving the lives of their people.

In light of this, the European Union adopted the Forest Law Enforcement, Governance and Trade (FLEGT) Action Plan in 2003, setting out a range of measures available to the European Union (EU) and its Member States to tackle illegal logging in the world's forests (see 4. below). The Action Plan combines measures in timber producer countries (supply side) with measures in consumer countries (demand side). Voluntary Partnership Agreements (VPA) are at the core of FLEGT implementation. VPAs are bilateral trade agreements between the EU and tropical wood exporting

[114] COM(2008) 645 final and Council Conclusions of December 4, 2008 on "Addressing the challenges of deforestation and forest degradation to tackle climate change and biodiversity loss"

countries, which aim to improve forest governance and guarantee that the wood imported into the EU is from legal sources. So far, 6 countries have concluded a FLEGT VPA with the EU: Ghana, Cameroon, Congo Brazzaville, Liberia, the Central African Republic and Indonesia. Eight other VPAs are being negotiated with Vietnam, Laos, Malaysia, Gabon, Democratic Republic of Congo, Côte d'Ivoire, Guyana and Honduras. On the demand side, the EU has adopted a new EU Timber Regulation that entered into application on March, 2013: this regulation prohibits the placing of illegal timber on the EU markets and obliges operators to reduce the risks of introducing illegal timber through the implementation of due diligence systems. The EU also promotes legal timber in public procurement policy.

REDD+ has emerged as one of the key areas for action on mitigating climate change. Emissions from deforestation and forest degradation[115] in tropical countries are significant, representing 15% to 20% of global annual anthropogenic $CO_2$ emissions. In addition, the total quantity of carbon stored in forest soils and ecosystems is equivalent to 40 years of global anthropogenic $CO_2$ emissions, indicating the importance of conserving this carbon stock to the extent possible.

Thus, tackling forest emissions and improving forest carbon sequestration via a set of incentives and policy approaches negotiated under the UN Framework Convention on Climate Change, known as REDD+, is estimated to have the potential to reduce net global emissions by up to 3 Gt $CO_2e$ annually by 2030[116], provided adequate and predictable support is provided.

REDD+ activities must take into account and avoid creating conflicts with practices of indigenous peoples and local communities and must ensure preservation of biodiversity, ecosystem services and social co-benefits. Assistance to developing countries will be necessary in order to produce accurate data and build capacity to establish and implement an effective and reliable framework for including REDD+ in their low carbon growth plans; in this context, the contribution of initiatives such as the EU Action plan on Forest Law Enforcement Governance and Trade (FLEGT) should be particularly underlined.

Reducing direct and indirect drivers of deforestation, including through: a) demand and/or supply-side measures that can reduce the impact of EU consumption on forests in third countries; b) considering trade related measures to reducing deforestation (FTAs provisions, Due Diligence, voluntary initiatives by the private sector, etc.); c) appropriate market signals targeting producers, retailers and consumers (awareness raising and education campaigns, clear and effective labelling of products, etc.)

***Global drivers of Forest Degradation and Deforestation***

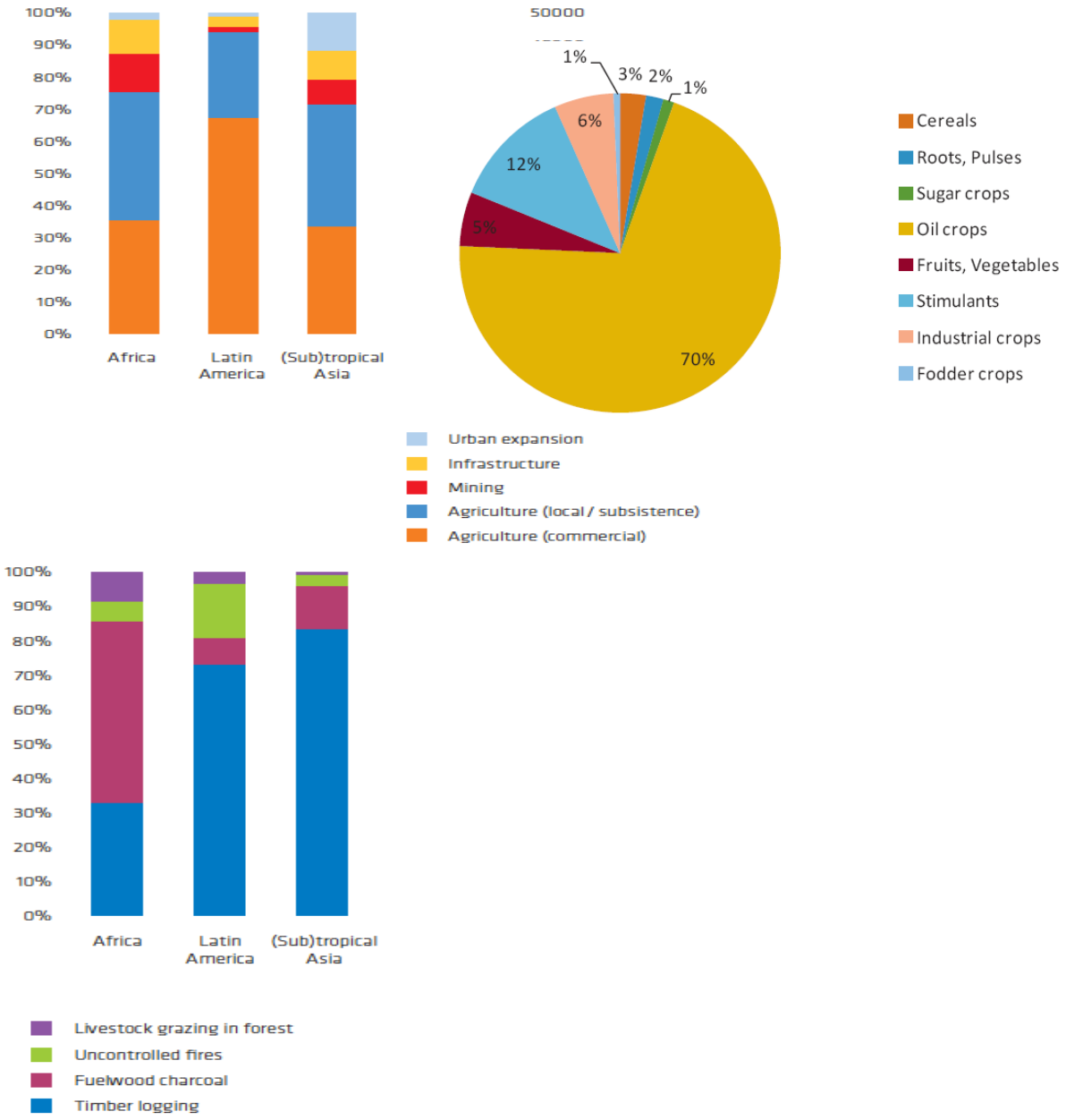
[115] Deforestation is the removal of forest and conversion to other land use. The generic definition of forest degradation is a reduction of its capacity to provide goods and services. In a REDD+ context it is usually understood as the impact of land-use activity that reduce the carbon stock in a forest relative to its natural carbon carrying capacity.

[116] Initial analysis on the mitigation potential in the Forestry sector, prepared for the UNFCCC Secretariat by Jürgen Blaser and Carmenza Robledo, 2007

While Sustainable Forest Management remains a central concept, there is an increased recognition of the need to also tackle more broadly the impact of demand for goods and services in driving forest degradation and deforestation through forest land conversion for alternative uses than forests, that mostly takes place in tropical regions. Action limited to the forest sector will be insufficient to address all drivers of deforestation and forest degradation which are largely outside this sector. Among the key drivers, agriculture (both subsistence agriculture and commercial agriculture), livestock, fuelwood and charcoal consumption, timber logging and mining deserve special attention. Addressing these drivers requires a broad range of actions including promoting sustainable intensification in agriculture and environmental friendly agriculture practices, changing consumption patterns, promoting access to non-biomass energy sources, combatting illegal logging, promoting a sustainable forest industry, and promoting good practices/codes of conduct for mining operations. As one of the main markets for forest and agricultural products, consumption of timber and agricultural products in the EU has an impact on forest degradation and deforestation well beyond its borders. In this respect, a recent study commissioned by the EC shows that in 2004 deforestation associated with EU27 final consumption equalled 10% of worldwide deforestation embodied in commodities and products. Consumption of oil crops (soybeans, palm oil) and derived products, as well as livestock products, had the main impact (see fig. 2.10 below). Imports of wood products from third countries, particularly for energy use, will increase significantly in the upcoming years[117]. The EU has hence a strong potential to reduce its impact on worldwide deforestation by adopting appropriate demand and supply-side measures, including trade-related measures, aimed at improving resource efficiency and sustainability of its domestic consumption.

[117] The EU demand for wood pellets is estimated to triple by 2020 (study commissioned by DG ENV on impacts of EU consumption on Deforestation to be published shortly).

**Figure13. Key drivers[118] of deforestation (top), of degradation (in relative area, bottom left), and cumulative deforestation embodied in EU27 crop consumption by crop group, 1990-2008** [119] (bottom right)




[118] Drivers of Deforestation and Forest Degradation: A Synthesis Report for Policymakers, 2012 by Gabrielle Kissinger et al. supported by United Kingdom Departments for Energy and Climate Change (DECC) and International Development (DFID) and The Government of Norway's International Climate and Forest Initiative

[119] Comprehensive analysis of the impact of EU consumption of imported food and non-food commodities and manufactured goods on deforestation, 2012, by VITO for the European Commission

2.3.7.3. Contribution from the new EU Forest Strategy to international aspects

The strategy confirms EU's ambition to remain at the forefront of global efforts aimed at promoting sustainable forest management and the contribution of forests to the achievement of the internationally agreed development goals, including poverty eradication and environmental sustainability, improving forest governance, and addressing the drivers of deforestation and forest degradation The strategy will also ensure coherence between EU and Member States domestic policies and their objectives and commitments on forest-related issues at the international level. It will assist the EU and its Member States in formulating clear and coherent objectives in relation to the international forest agenda.

At the regional level, the adoption of a legally binding treaty on forests involving all EU Member States is likely to have ramifications for EU policies which should be dealt with in the follow-up process of the new EU Forest Strategy.

Illegal logging and poor governance and law enforcement of the forest sector are one of the main drivers of forest degradation and deforestation. . Through the EU FLEGT Action Plan[120], the EU has been fighting illegal logging through a mix of supply side measures, notably with the support to forest governance reforms and Voluntary partnership agreements (VPAs), and demand side measures, with procurement policies and the EU Timber regulation. Similar objectives have been pursued by international partners such as USA and Australia with demand side measures (Lacey Act (2008) Amendment and the Illegal Logging Prohibition Bill, respectively). The emergence of new markets, particularly in Asia, which will represent an increasing share of world's demand for timber will require in the years to come an active engagement with international partners and achieve increased cooperation and coherence at international level in order to ensure increased effectiveness of EU's efforts.

2.3.7.4. Financial resources

The total EU contribution during the period 2000-2006 for forest projects in third countries was €348 million. As for the next commitment period 2007-2012, resources have been considerably increased reaching over € 650 million. The detailed distribution of funding to the different regions is included in table 9 and figure 14.

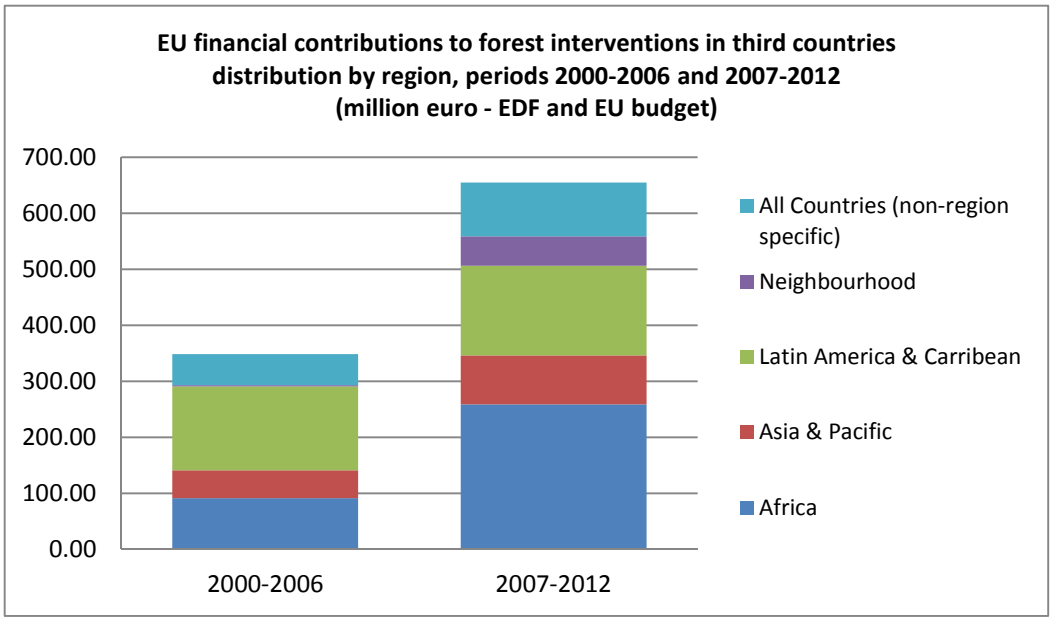
**Table 9. EU development funds by region**

| By region: | Period 2000-2006 | Period 2007- 2012 | Total per region |
|---|---|---|---|

[120] As of March 2013, 6 Voluntary Partnership Agreements have been concluded (Cameroon, Central African Republic, Congo, Ghana, Indonesia, Liberia,,) and 8 are currently being negotiated (Côte d'Ivoire, Democratic Republic of Congo, Gabon, Guyana, Honduras, Laos, Malaysia, Vietnam).

| | | | |
|---|---|---|---|
| Africa | €91,407,858.05 | €258,655,906.61 | €350,063,764.66 |
| Asia & Pacific | €49,198,765.34 | €87,142,066.75 | €136,340,832.09 |
| Latin America & Caribbean | €149,713,258.33 | €160,489,026.43 | €310,202,284.76 |
| Neighbourhood | €2,533,201.78 | €52,572,963.60 | €551,061,65.38 |
| All Countries (non-region specific) | €55,634,689.28 | €95,898,839.12 | €151,533,528.4 |
| **Total** | **€ 348,000,000** | **€654,758, 802** | **€1,002,758,802** |

**Figure 14. EU financial contributions to forest interventions in third countries**




Under climate change international policy, there are also financing possibilities, in particular under REDD+ (table 10). In February 2012, the Council invited[121] the Commission to explore further how to scale up results based financing for REDD+ over time including towards the committed goal of US$100 billion, inter alia with

[121] 3148th ECONOMIC and FINANCIAL AFFAIRS Council meeting, 21/02/2012

respect to catalysing the private sector investments in order to address the drivers of deforestation and how to further increase the effectiveness and efficiency of REDD+ financing.

**Table 10. Commitments and pledges for REDD+ activities by EU MS and the EU budget**

| Type of support | in € million |
|---|---|
| REDD+ Fast-Start Financing 2010 – 2012, (including FLEGT, EU-REDD Facility and the Global Climate Change Alliance, excluding FIP, GEF, FCPF and UNREDD)[122] | 455 |
| UN-REDD Multi Donor Trust Fund 2008 – 2011[123] | 20 |
| Forest Carbon Partnership Facility (FCPF)<br><br>Readiness and Carbon Funds 2008 – 2012 | 151 |
| Forest Investment Program (FIP) 2008 – 2011 | 189 |
| Global Environment Facility, Sustainable Forest Management and REDD-Plus Program (GEF, Indicative 2007-2010) | 143 |
| REDD projects financed from EU budget, 2008 – 2011[124] | 58 |
| Research projects Financed from EU budget, 2010 – 2012[125] | 11 |
| Other EU commitments reported to the Voluntary REDD+ Database (REDD+ Partnership), up to 2012 | 515 |
| TOTAL | 1,542 |

2.3.7.5. Contribution of the Forest Strategy to the international pillar

The international pillar of the new EU Forest Strategy aims at:

- Raising the profile of the EU and its Member States in international forest policy, and ensuring consistency across relevant EU domestic and international policies;
- Promoting SFM in pan Europe and globally, and the role of forests in the transition to a green economy in the context of EU development cooperation and external action;

[122] Source: European Union fast start funding for developing countries, 2011 progress report
[123] UN-REDD
[124] Source: European Commission services
[125] Source: European Commission services

- Ensuring continued support for global efforts to fight illegal logging through the FLEGT Action Plan;
- Supporting developing countries in their efforts to improve forest policies and regulations, strengthen forest governance, value and monitor forest ecosystems, promote SFM, and address the drivers of deforestation and forest degradation through REDD+;
- Reducing direct and indirect drivers of forest degradation and deforestation, including by promoting measures that can reduce the impact of EU consumption on forests in third countries.

### *2.3.8. State aid and the forest sector*[126]

Under Article 107 (1) of the Treaty on the Functioning of the European Union ("TFEU"), aid granted by a Member State or through state resources in any form whatsoever which distorts or threatens to distort competition by favouring certain undertakings or the production of certain goods is prohibited, insofar as it affects trade between Member States. Article 42 of the TFEU lays down that the rules on competition apply to the production of and trade in agricultural products only to the extent laid down by the European Parliament and the Council. State aid rules do not apply under specified conditions to certain aid measures in favor of agriculture products listed in Annex I of the TFEU. The general prohibition to grant State aid does apply to the highly competitive forest sector within the internal market. In a judgement of the Court of Justice of the EU,[127] the forest sector and forestry activities are confirmed to fall outside of Annex I and Article 42 of the TFEU. Therefore, in principle, a State aid measure to the forest sector is subject to Articles 107, 108 and 109 of the TFEU. Article 108(3) of the TFEU requires that Member States notify all planned state aid measures to the European Commission and implement them only after their approval by the European Commission.

Article 107(2) of the TFEU provides for derogations from the general prohibition[128] and the forest sector (forestry and forest-based industries) may also benefit from those under certain conditions. The conditions for applying these derogations are mentioned in the respective aid instruments of Directorate-General for Competition and Directorate –General for Agriculture and Rural Development. The Commission can approve a forest aid measure, if it complies with the applicable State aid framework

[126] Caveat: This section aims to provide general information on State aid rules in the forest sector and it should not be regarded as a formal legal position of the European Commission. For the applicable legal framework, please refer to the State aid instrument published in the Official Journal and to the consistent practice of the EC (http://ec.europa.eu/competition/state_aid/overview/index_en.html) and the jurisprudence of the ECJ (http://curia.europa.eu/) on forest aid measures.

[127] Judgement of the Court of 23 February 2006 in joined Cases C-346/03 and C-529/03, paragraphs 37, 42 and 43

[128] For example, aid to make good the damage caused by natural disasters or exceptional occurrences *shall be* compatible with the internal market, and aid to facilitate the development of certain economic activities or certain economic areas, where such aid does not adversely affect trading conditions to an extent contrary to the common interest *may be considered* to be compatible with the internal market.

and if it can therefore conclude that a forest measure can benefit from any of these derogations. The State aid rules in force during the period 2007-2013 make a distinction between forest activities which A) contribute directly to maintaining or restoring ecological, protective and recreation functions of forests and to the biodiversity and a healthy forest ecosystem and B) other forest based industrial activities, which are related to the commercial extraction and transportation of timber and processing wood or other forestry resources into product of energy generation.

**Part 1: 2007-2013**

Regarding forest activities in category A, the Community guidelines for State aid in the agriculture and forestry sector 2007 to 2013[129] ("agricultural and forestry guidelines") allow Member States to make available three types of aid. The first type of forest measures are therefore aligned with the EU rural development policies and permit aid under the same conditions and with the same aid intensities as stipulated in Articles 43-49 of Council Regulation 1698/2005. Under these provisions aid can be granted to the first afforestation of agricultural land, first establishment of agroforestry systems on agricultural land, first afforestation of non-agricultural land, Natura 2000 payments, forest- environment payments, for restoring forestry potential and introducing prevention actions and for non-productive investments. Additional costs and income foregone due to the use of environmentally friendly forestry technology going beyond the relevant mandatory requirements on the basis of voluntary commitment to use such technology meeting the conditions of the rural development forest-environment measure can also be available.[130]

Under Point 175 of the agricultural and forestry guidelines, the second type of aid to the forest sector can be available with 100% aid intensity, where the measure contribute to the listed ecological, protective and recreation activities and to the biodiversity and a healthy forest ecosystem. The third type of forest aid constitute those measures, where rules are common with the agricultural sector, such as purchase of forest land, training and consultancy services and setting up forestry associations.

Various activities related to forest based industries, commercial extraction of timber and processing wood or other forestry resources into product of energy generation (category B) may be supported under the common rules of the EU State aid framework, such as Community framework for state aid for research and development and innovation,[131] Community guidelines on State aid for environmental protection,[132] the Guidelines on national regional aid for 2007-

[129] OJ C-319, 27.12.2006, p1

[130] For such environmentally friendly forestry technology measure, the aid amount may exceed the limit fixed in the rural development regulation when duly justified.

[131] Official Journal C 323 , 30/12/2006, p1-26

[132] Official Journal C 082 , 01/04/2008 , p 1-33

2013[133] and the Community guidelines on State aid for rescuing and restructuring firms in difficulty[134].

Exemptions from the notification obligation are possible if a measure complies with a Block Exemption Regulation, which constitutes a mean of administrative simplification. On the basis of a Commission proposal, the EU Council of Ministers can enable the Commission to exempt from the prior notification obligation specific categories of aid that have a limited potential to distort competition within the internal market. The Commission can thus adopt Block Exemption Regulations (BERs), defining the conditions which ensure that if all criteria are fulfilled the aid is compatible with European state aid rules. In such cases, the Member States ensures compliance with the applicable BER and the Commission can carry out ex-post control.

Under the Block Exemption Regulations, certain categories of aid to the forest sector may be exempted from the notification requirement. In the 2007-2013 period, forestry measures were block exempted, for example[135] under the general block exemption regulation[136] or under the block exemption regulation for regional aid.[137]

In some cases, the measure at stake is not considered to fulfil the criteria of Article 107 (1) of the TFEU, and should therefore not be notified. This is the case, where the total amount of aid granted to any one forest undertaking does not exceed EUR 200 000 over any period of three fiscal years. This is the so-called 'de minimis' aid. The other applicable provisions of the de minimis regulation[138] should also be fulfilled.

In the past, the Commission has found that certain aid measures for the forest sector do not constitute aid, since not all criteria of Article 107 (1) of the TFEU are met.[139]

## Part 2: 2014-2020

The majority of the afore-mentioned European State aid legal instruments expires on 31 December 2013 and are thus currently being revised. The revision[140] is part of the

[133] Official Journal C 054 , 04/03/2006, p 13-44

[134] Official Journal 244 , 01/10/2004, p 2-17, as last prolonged by Commission communication concerning the prolongation of the application of the Community guidelines on State aid for rescuing and restructuring firms in difficulty of 1 October 2004, *OJ* C-296, 2.10.2012, p3

[135] Please refer to the website of DG Competition regarding specifics forest aid schemes: http://ec.europa.eu/competition/state_aid/register/

[136] , Commission Regulation (EC) No 800/2008 of 6 August 2008 declaring certain categories of aid compatible with the common market in application of Articles 87 and 88 of the Treaty (General Block Exemption Regulation), OJ L 214, 9.8.2008, p. 3–47

[137] Commission Regulation (EC) No 1628/2006 of 24 October 2006 on the application of Articles 87 and 88 of the Treaty to national regional investment aid (Block Exemption Regulation for regional aid), OJ L 302, 1.11.2006, p. 29–40

[138] Commission Regulation (EC) No 1998/2006 of 15 December 2006 on the application of Articles 87 and 88 of the Treaty to de minimis aid, *OJ L 379, 28.12.2006, p. 5–10*

[139] See, for example, Aide d'Etat/Italie (Calabre) SA.33142 (N/2011) "Non aide – Mesure 226 (organismes publics)" or State aid N 374/2009 – Ireland. National Development Plan 2007-2013. R&D&I aid scheme. Available at: http://ec.europa.eu/competition/elojade/isef/index.cfm?clear=1&policy_area_id=3

[140] Caveat: The present section relies on the information available on 01.02.2013 on the websites dedicated to State aid modernization in the agricultural and forestry sector and should not

State aid modernisation (SAM) package,[141] which aims at fostering growth in a strengthened, dynamic and competitive market, focusing enforcement on cases with the biggest impact on the internal market and streamlining rules and faster decisions. . The current proposal on support for rural development by the European Agricultural Fund for Rural Development (EAFRD)[142], submitted by the Commission in October 2011 as part of the package of proposals for the CAP post-2013[143], leads directly to the need to revise the legal basis for State aid in the agricultural sector, which also involve forest measures as part of the rural development strategy.[144] This approach is followed by the indicative Roadmap[145] of the Community Guidelines for State aid in the agriculture and forestry sector 2014-2020 and of the Block exemption Regulation on the application of Article 107 and 108 of the Treaty to State aid to small and medium-sized enterprises active in the production, processing and marketing of agricultural products and forestry.[146]

The forest sector is not covered by Article 42 TFEU and the general competition rules apply although specific forest aid measures are contained in the rural development programs. The Commission has indicated in its Communication on State aid Modernisation of 8 May 2012[147] that for cases with limited effect on trade and limited

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prejudice in any way the policy considerations and the decision which will be taken by the European Commission.

[141] The overview provided on the post-2013 policies address the main tendencies of the modernisation, due to the ongoing revision of State aid rules and the legislative process for the Common Agricultural Policy (CAP). Please refer to: http://ec.europa.eu/competition/state_aid/modernisation/index_en.html and http://ec.europa.eu/agriculture/cap-post-2013/index_en.htm On 17 January 2013, the European Parliament adopted a Resolution on the State aid Modernisation initiative of the European Commission. In November 2012, the European Economic and Social Committee and the Committee of the Regions adopted its opinion, respectively on SAM

[142] COM(2011) 627 final/2; Proposal for a Regulation of the European Parliament and of the Council on support for rural development by the European Agricultural Fund for Rural Development. http://ec.europa.eu/agriculture/cap-post-2013/legal-proposals/com627/627_en.pdf

[143] http://ec.europa.eu/agriculture/cap-post-2013/legal-proposals/index_en.htm

[144] Please refer to Consultation on the State aid instruments in the agricultural sector**.** http://ec.europa.eu/agriculture/stateaid/policy/consultation/index_en.htm

[145] Roadmap on Community Guidelines for State aid in the agriculture and forestry sector 2014-2020; Block exemption Regulation on the application of Article 107 and 108 of the Treaty to State aid to small and medium-sized enterprises active in the production, processing and marketing of agricultural products and forestry; Modification of the annexes to the implementing Regulation 794/2004 regarding the notification of State aid in the agricultural and forestry sector, 03/12/2012, Please refer to p3 ,p6 and p9. *It should be noted that the Roadmap is only indicative and the information it provides is only for information purposes and is subject to change. The roadmap does not prejudge the final decision of the Commission on whether the initiative will be pursued or its final content and structure.* Available at: http://ec.europa.eu/governance/impact/planned_ia/docs/2013_agri_001_state_aid_package_en.pdf

[146] Roadmap, ibid, p8. Please also refer to the consultation documents on the modernisation of state aid rules in the agricultural sector, available at: http://ec.europa.eu/agriculture/stateaid/policy/consultation/index_en.htm

[147] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions EU State Aid Modernization (SAM), COM/2012/0209 final

potential to distort competition a simplified analysis will be proposed. The Commission`s proposal of December 2012,[148] following its adoption, would enable the Commission to block-exempt further categories of aid from the notification requirement, including certain types of aid in favor of forestry contained in the rural development programmes, where experience acquired is sufficient to allow the Commission to define clear compatibility criteria ensuring that the effect on competition and trade between Member States is limited.

#### *2.3.9. National forest policies & National Forest Programmes in the EU Member States*

National Forest Programmes (NFP) have been established in most of the EU Member States in accordance with the pan-European forest policy process. They provide a global framework to address forestry issues in the context of sustainable forest management. NFP are tools for the planning, implementing and monitoring of forestry and forest-related activities and provide an environment for the concerted and coordinated implementation of programs and activities by all interested parties on the basis of mutually agreed objectives and strategies. NFP follow a wide range of approaches to develop, program and implement forest policies in a country or a region.

The share of countries with formal NFP processes is steadily increasing, but that there are still significant differences between the Member States in terms of the use of the NFP principles, such as stakeholder participation, cross-sectoral approach and iterative processes. More attention is increasingly paid to legal frameworks, effective implementation and monitoring.

Both the 1998 Forestry Strategy and the 2006 Forest Action Plan address particular attention to NFP, in particular as a suitable framework for implementing international forest-related commitments. The new EU Forest Strategy also considers these programs as a central element for the implementation of the new Forest Strategy. Member States are invited to set up and implement their action plans & national forest programs considering the principles and targets of the new EU Forest Strategy. NFP should ensure that they take into account the relevant EU policies such as rural development, biodiversity, renewable energy, resource efficiency or climate change.

NFP contribute to the coordination and cooperation goals and are strongly supported by the new Strategy.

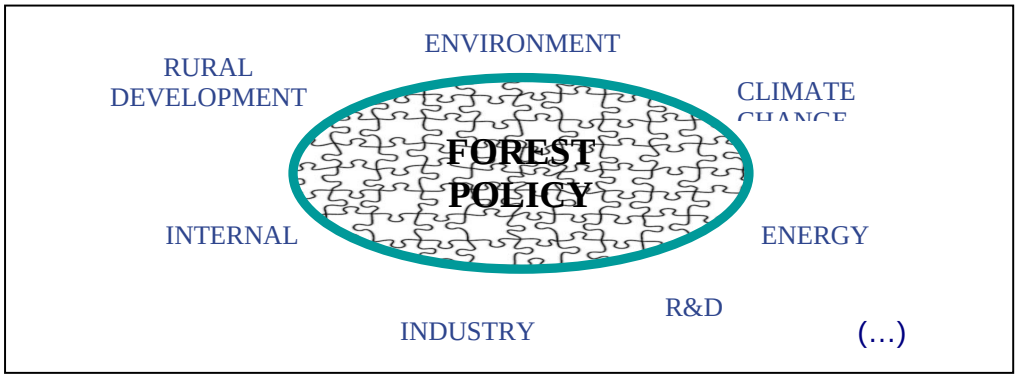
### 2.4. Coordination, cooperation and communication

[148] Proposal for a Council Regulation amending Regulation (EC) No 994/98 of 7 May 1998 on the application of Articles 92 and 93 (now 87 and 88 respectively) of the Treaty establishing the European Community to certain categories of horizontal State aid and Regulation (EC) No 1370/2007 of the European Parliament and of the Council of 23 October 2007 on public passenger transport services by rail and by road.COM(2012)730 final, 5 December 2012

### *2.4.1. Coordination and cooperation*

As has already been stated, there is no provision for a common EU forest policy in the Treaty but forestry is a significant and essential element of several existing and developing EU policies, for example relating to agriculture, biodiversity, climate, energy, water and soil etc. These policies in turn are major contributory factors to what is seen as the complex, fragmented and sometimes contradictory forest policy environment that exists today, see figure below. All this shows the growing need for a policy framework that coordinates and ensures coherence of forest-related policies and allow synergies with other sectors influencing forest management. The EU needs a new forest strategy as a key reference in forest-related policy development. EU forests and its forest sector need to be positioned in a way that ensures their contribution to the EU's objectives and targets[149].

**Figure 15: The complex forest policy environment**




The 1998 Forestry Strategy and subsequent Forest Action Plan established a governance structure that proved to be useful for information purposes but lacked a clear distribution of tasks, which in turn made it difficult to hold different actors to account for their responsibilities.

Stronger commitment and political support from all parties involved are needed. Otherwise the strategy will fail to impact on policy processes both at EU and at Member State level and the forest sector response to developments in other policy areas would remain weak.

### *2.4.2. Communication*

Over the last few decades, crucial changes have taken place in the views and demands on forests by society at large. To know more how the general public is thinking about forest and forestry the Commission conducted a ground-breaking study when a

[149] See the annex to the Communication on the new forest strategy

representative survey was carried out across the EU-27 surveying a total of 11,106 randomly selected citizens.

The survey found that the public perceives protection / prevention of deforestation as a key concern regarding forests and that the general condition of European forests is worse than it actually is. However, in reality, total forested area in Europe has been increasing slightly over the past two decades (approx. 0.8% per year) and the loss of biodiversity has at least slowed down due to recent policy measures. Moreover, contrary to expert expectations, neither ecosystem services nor recreational purposes seem to be high on people's lists when thinking of forests. Relationship between and importance of key threats and damages to forests (storms, diseases, pests and invasive species) not well known by the public. Contrary to the high media attention given to forest fires, other very important threats to forest health are much less exposed to the public.

European public places higher value on forest conservation and forests' protective functions than on forest utilisation aspects: In line with previous studies and expert expectations, the preservation of biodiversity is perceived as one of the most important functions of forests. Furthermore, the expectation of experts in terms of an increasing importance placed on the value of forests for protecting against climate change and natural disasters was confirmed by the public survey: an overwhelming majority values this benefit over most other forest uses.

Public perception on preferred management style for various forest uses/benefits varies widely: Based on previous studies and the survey among experts, the overall perception of Europeans on the quality of forest management is rather positive. The clear majority of EU citizens stated they would favour more active management (multifunctional and sustainable management) to better address all three pillars of SFM, whilst experts were divided about the likely EU citizens' opinion about management for protecting biodiversity, for protecting against climate change and for providing recreational opportunities. For the other two forest functions – providing wood as a renewable material and providing wood for bioenergy – experts had predicted that the majority of EU citizens would favour more active management, while in reality, the public opinion survey showed that the European public is more or less evenly divided on what the best forest management style should be (more or less active management) for these two forest uses. Regional differences are quite significant regarding citizens' opinion on the preferred management style for providing wood as a renewable material: citizens in the South West region place a stronger emphasis on less or much less active management than people in the South East region; North West and central Europe are in line with the EU-27 mean.

European public is also interested in the links between forests and climate change and the majority believes forests can help in one way or another to tackle climate change. A clear finding of this study is that people are more and more concerned with and interested to learn more about the interplay between forests and climate change, however, the European public is currently divided as to what types of forest management measures (wood as renewable material, wood for bioenergy, afforestation) could best help address climate change.

As various parts of the public survey have demonstrated, the European public has clearly shifted its expectations as regards forests and forestry from a traditional commodity and recreational perspective to a demand for greater protection and management for ecosystem services (i.e. emphasis on forest services and benefits centred on protection).

#### 2.4.2.1. Implications for future forest communication

The study formulates recommendations on how national and EU-wide communication on the role of forests and forestry in addressing new challenges (e.g. climate change, the increasing demand for bio-energy, and balancing forest use with nature protection and biodiversity conservation) in European society may be improved. The outcomes of the public survey confirmed expert predictions on the two most requested topics for further information: sustainable forest management and the interplay between forests and climate change. Overall, forest communication faces the challenge to reach out to the public on topics that are currently not high up on the communication agenda. This leads to the definition of three key areas for improving future forest communication across Europe:

- The need for a clear and sufficiently detailed message presented in a neutral manner that allows the public to make appropriate distinctions depending on the relevant specific issues and challenges, including forest area, biodiversity and damages, for various geographic contexts (i.e. local forests, European forests, forests worldwide),

- The need for stressing the important role of forests and wood in tackling climate change and,

- The need for addressing specific audience; with emphasis on communicating with the more disinterested public, i.e. the young people.

Responding to the challenges raised by the study, and following Key action 18 of the EU Forest Action Plan "Improve information exchange and communication" an ad hoc Standing Forestry Committee (SFC) working group (WG) was established to develop an EU communication strategy on forests and forestry[150]. The WG was formed with participation of members of the UNECE Forest Communicators Network. In result of a series meetings held in 2010 a draft Communication strategy on forests and forestry in the EU was developed and adopted by the SFC in 2011.

#### 2.4.2.2. Contribution of the new Forest Strategy to Coordination, cooperation and Communication

<u>The new Forest strategy aims to:</u>

[150] More info on the DG AGRI – Forest webpage: http://ec.europa.eu/agriculture/fore/statistics_en.htm#book1

- Explore various options for better coordination on SFM and forest information and strengthened cooperation between and with Member States;

- Further improve coordination and coherence of policies affecting forests and the forest sector, in particular with the support of the SFC;

- Enhance stakeholder involvement in discussions on forest-related issues. The Advisory Group on Forestry and Cork and the Advisory Committee on Forest-based Industries also have key roles here;

- Encourage Member States to support Forest Advisory Systems as a tool of awareness, training and communication between local forest holders and Authorities;

- Improve public information about forests and wood raw material, building on the EU Forest Communication Strategy by the SFC and working together to promote the main messages of the EU Forest Strategy;

- Further assessing public perception of forests (e.g. via Eurobarometer).

## 3. WAY FORWARD

### 3.1. Governance

Based on the governance structure created in the framework of the 1998 Forestry Strategy, an improved coordination scheme with a clear distribution of responsibility for actions among different actors and levels of governance can improve the interactions between the different committees and the usefulness of their contributions, giving to these groups a clear role in EU's forest-related policy formulation and development. The specific role of the Standing Forestry Committee, composed of representatives of the forest administrations of the Member States advising the Commission in forest related matters, has to be underlined. It will be the cornerstone of an improved coordination of future work in this field, although it should revise its working methods, to reinforce the links with related policies and, when necessary, working together with other relevant committees and fora.

#### *3.1.1. Standing Forestry Committee (SFC)*

The SFC will be closely involved in the implementation of the strategy. Through the SFC, Member States should report on how they are managing their forests according to their national forest policy and legislation and, in this framework, what is their baseline for SFM.

The consultative role of SFC on Community measures affecting forests before the adoption by the Commission will be strengthened, taking into account the opinions of the SFC for policy formulation on issues relevant for forests and forestry. The appropriate exchanges between the SFC and other committees relevant for forests

should also be ensured, such as the Standing Committee on Agricultural Research (SCAR) or the FLEGT Committee. More emphasis will be given to the use of the SFC as a means of considering the balance of competing demands on forests and keeping forests multi-functional..

The SFC whose working methods will be renovated and adapted to the challenges, reinforcing links with related policies and, when necessary, working together with other relevant committees. It should revise how it takes stock of, responds to and builds upon inputs from other policies. The SFC will further contribute to improve the coordination through the following measures:

- Elaboration of an annual working plan for the SFC that addresses

    1. The monitoring, evaluation and reporting of the strategy;

    2. The work towards the target;

    3. The mechanisms to involve stakeholders.

- Organisation joint workshops between the SFC and the AGFC to improve the participation and dialogue with stakeholders.

- Working together with other committees on certain issues. The joint preparation of the guide on Natura 2000 and forests by the SFC, the Advisory Group on Forestry and Cork, the Habitat Committee[151] and the Expert Group on Natura 2000 management could be considered as best practice in this regard. The working arrangement for future challenges is to be decided on a case by case basis and could be addressed in the annual work program of the SFC.

- Further involving the experts from other disciplines in the SFC meetings and vice versa, improve the participation of forest experts in the relevant committees.

### *3.1.2. Advisory Groups and consultative bodies*

The Advisory Group on Forestry and Cork (AGFC) provides the views of socio-economic sectors and consumers on matters arising in connection with forests and rural development.

The Advisory Committee on Forestry and Forest-based Industries advises the Commission on industrial aspects of Community policies affecting forest-based industries and forestry as well as on matters concerning the market and other economic considerations affecting forest products in the Community.

The Economic and Social Committee as well as the Committee of Regions, consultative bodies of the EU, should also be more closely associated.

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[151] Article 20 of COUNCIL DIRECTIVE 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora

### *3.1.3. Commission Inter-services Group on Forestry*

The inter-services group on forestry will be the follow up platform to ensure global view and coherence of forest related initiatives in the Commission, which will be subsequently submitted to the SFC.

### *3.1.4. Forest Directors General Meetings*

These meetings have as main purpose the exchange of views in an informal environment on policy issues concerning forests. They should give guidance to the further implementation work of the forest strategy. Their orientations should be submitted to the SFC.

### *3.1.5. Council Working Parties*

The relevant Council Working Parties (WP) and in particular the Forestry WP would work to implement the EU Forest Strategy in the fields for which they are responsible such as international negotiations on forest and forest-related policies. This WP as co-legislator has a key role discussing the proposals from the Commission on forest related initiatives after being adopted.

This governance structure aims to provide better coordination/synergies between EU and Member State levels with stronger commitment of the leading actors, improving the coherence between domestic and international forest-related policies, strengthening the ownership of this strategy and bringing it closer to citizens.

### *3.1.6. European Parliament*

The European Parliament should also play an important role in the strategy, not only in its capacity as co-legislator but also as a driving force for mobilising citizens and their national parliaments on relevant forest-related issues.

## 3.2. Follow up

| |
|---|
| The strategy will be subject to a review by 2018 to assess progress in implementing the strategy. In particular, it will assess if goals and forest headline target are being met, also addressing the contribution from forests and the forest sector to the relevant EU targets. |

With the current legal setup and in the absence of a common EU Forest Policy, the strategy proposed in the Communication has gone as far as it could addressing in a holistic and balanced way the three pillars economic, social and environmental that define sustainable forest management. Other possibilities, however, exist in the different pillars and policies separately, but this will not allow addressing through a holistic approach forests and the forest sector.

## ANNEX I: DEFINITIONS

For the purpose of the Communication on an EU Forest Strategy, the following definitions are used:

**Forest(s):** Land spanning more than 0.5 ha with trees higher than 5 meters and a canopy cover of more than 10%, or trees able to reach these thresholds in situ. It does not include land that is predominantly under agricultural or urban land use. Other wooded land is a land not classified as forest *(source: FAO - Global Forest Resources Assessment 2010 Terms and Definitions Working Paper 144/E Rome 2010).*

**Other wooded land (OWL):** Land of more than 0.5 ha not classified as a forest. It has a canopy cover of 5 % to 10 %, comprising trees able to reach a height of 5 metres at maturity in situ; or with a combined cover of shrubs, bushes and trees. It does not include land that is predominantly under agricultural or urban use *(source: FAO - Global Forest Resources Assessment 2010 Terms and Definitions Working Paper 144/E Rome 2010).*

**Forests available for wood supply** (FAWS): Forests where no legal, economic, or environmental restrictions have a bearing on the supply of wood (*source: Eurostat).*

**Sustainable forest management (SFM**): The stewardship and use of forests and forest lands in a way, and at a rate, that maintains their biodiversity, productivity, regeneration capacity, vitality and their potential to fulfil, now and in the future, relevant ecological, economic and social functions, at local, national, and global levels, and that does not cause damage to other ecosystems (*source: Ministerial Conference for Protection of Forests in Europe. Helsinki, 1993*).

**Forestry:** The term forestry is considered to encompass the production of standing timber as well as extraction and gathering of wild growing forest materials. It also includes products which undergo little processing, such as wood for fuel or industrial use (*source: Eurostat; SEC(2006)748 Staff Working Paper on an EU Forest Action Plan).*

**Forest-based sector:** Term covering forest resources and the production, trade and consumption of forest products and services. Throughout the text the term "forest sector" is used instead (*source*: *European Forest Sector Outlook Study 1960-2000-2020, UNECE-FAO; SEC(2006)748 Staff Working Paper on an EU Forest Action Plan*).

**Forest-based industries:** Industries downstream from forests, principally wood-processing but also others based on e.g. non-wood forest products (cork, resin, et al.). It includes woodworking, pulp & paper manufacture and converting, and printing

industries (*source: COM (2008)113 Communication on innovative and sustainable forest-based industries in the EU).*

**Ecosystem services**: Benefits people obtain from ecosystems. These include provisioning services such as food and water; regulating services such as flood and disease control; cultural services such as spiritual, recreational, and cultural benefits; and supporting services, such as nutrient cycling, that maintain the conditions for life on Earth (*source: Millennium Ecosystem Assessment, 2001*).

**Bioeconomy**: It includes agriculture, forestry, fisheries, food production, as well as parts of chemical, biotechnological and energy industries. It encompasses the sustainable production of renewable biological resources and their conversion, as well as that of waste streams into bio-based products, biofuels and bioenergy (*source: COM(2012)60 "Innovating for Sustainable Growth: A Bioeconomy for Europe"*).

**Green Economy:** An economy that generates growth, creates jobs and eradicates poverty by investing in and preserving the natural capital offers upon which the long-term survival of our planet depends (source*: COM(2011)363 "Rio+20: towards the green economy and better governance"*).

## ANNEX II: MAIN REFERENCES


Commission Staff Working Document annex to the Communication from the Commission on the implementation of the EU Forestry Strategy SEC(2005)333

Commission Staff Working Document annex to the Communication from the Commission on an EU Forest Action Plan SEC(2006) 748

Communication from the Commission on an EU Forestry Strategy COM(1998)649 final.

Communication from the Commission on the implementation of the EU Forestry Strategy COM(2005)84 final and the analysis of its implementatin

Communication from the Commission on an EU Forest Action Plan COM(2006)302 final.

Communication from the Commission on innovative and sustainable forest-based industries in the EU COM(2008)113

Communication from the Commission Europe 2020: A strategy for smart, sustainable and inclusive growth COM(2010)2020 final

Council Resolution of 15 December 1998 on a forestry strategy for the European Union.

Ex-post evaluation of the Forest Action Plan (October, 2012)

Green Paper on Forest Protection and Information in the EU: Preparing forests for climate change COM(2010)66 final

Mid-term evaluation of the Forest Action Plan (November, 2009).

Report of the Standing Forestry Committee ad hoc Working Group VI on forest information and monitoring (March, 2012)

Report of the Standing Forestry Committee ad hoc Working Group VII contributing to the development of a new EU Forest Strategy (June, 2012)

White Paper Adapting to climate change: Towards a European framework for action COM(2009) 147 final

## ANNEX III: ACRONYMS

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|---|---|
| **AC-FBI** | Advisory Committee on Community Policy regarding Forestry and Forest-based Industries coordination |
| **AGFC** | Advisory Group on Forestry and Cork |
| **CAP** | Common Agriculture Policy |
| **CBD** | Convention on Biological Diversity |
| **CITES** | Convention on International Trade in Endangered Species of Wild Fauna and Flora |
| **COST** | European Cooperation in Science and Technology |
| **EAFRD** | European Agricultural Fund for Rural Development |
| **EFDAC** | European Forest Data Centre |
| **EFDM** | European Forest Dynamics Model |
| **EFFIS** | European Forest Fire Information System |
| **EIP** | European Innovation Partnerships |
| **Era-Net** | Networking the European Research Area |
| **ERDF** | European Regional Development Fund |
| **ESF** | European Social Fund |
| **EUFGIS project** | Establishment of a European information system on forest genetic resources (supported under Council Regulation (EC) Nº 870/2004 on genetic resources in agriculture) |
| **FAP** | Forest Action Plan |
| **FLEGT** | Forest Law Enforcement, Governance and Trade |
| **FP7** | 7TH Framework Programme for research |
| **GFCF** | Gross fixed capital formation |
| **GVA** | Gross Value Added |
| **INC** | Intergovernmental Negotiating Committee |
| **JRC** | Joint Research Center |
| **JTI** | Joint Technology Initiative |
| **LBA** | Legally Binding Agreement |
| **LULUCF** | Land use, land use change and forestry |
| **MOTIVE** | MOdels for AdapTIVE forest Management project under FP7) |
| **NREAPs** | National Renewable Energy Action Plans |
| **REDD+** | Reducing emissions from deforestation and forest degradation, conservation of forest carbon stocks, sustainable management of forests, and enhancement of forest carbon stocks |

| | |
|---|---|
| **RD** | Rural Development |
| **SFC** | Standing Forestry Committee |
| **SoEF 2011** | State of Europe Forests 2011 |
| **SFM** | Sustainable Forest Management |
| **TFEU** | Treaty for the functioning of the European Union |
| **Trees4Future** | Research infrastructures for forestry research (project under FP7) |
| **UNFCCC** | United Nations Framework Convention on Climate Chance |
| **UNFF** | United Nations Framework on Forests |

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**COMMISSION STAFF WORKING DOCUMENT**

# A BLUEPRINT FOR THE EU FOREST-BASED INDUSTRIES (woodworking, furniture, pulp & paper manufacturing and converting, printing)

***Accompanying the document***

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**A new EU Forest Strategy: for forests and the forest-based sector**

{COM(2013) 659 final}
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# Table of contents

## I. Introduction

The EU Forest-based Industries - EU F-BI[1] - are taken to include: the woodworking industries; the furniture industry; the pulp & paper manufacturing and converting industries, and the printing industry. Together, they represent about 7% of EU manufacturing GDP and nearly 3.5 million jobs. The EU F-BI thus form an important part of the EU's manufacturing industry and their growth can help achieve the goals of the EU's Industrial Policy[2], including the aspirational goal of raising manufacturing industries' contribution to EU GDP from 15.3% (2012) to 20%, i.e. the "reindustrialisation" of Europe.

Through their value chains (see below), the EU F-BI extend upstream into a sustainable and increasing EU forest resource, which must be healthy and resilient to provide a stable foundation for wood growth and other functions. Downstream, they link into an array of industrial and consumer applications for their products. Their main raw material, wood, is a natural and renewable raw material which is re-usable and recyclable, thus having enormous potential to contribute positively to the EU's 2050 goals, such as to provide a high standard of living from lower levels of energy and resource consumption, so long as it comes from sustainable forest management. Around 90% of the initial wood raw material input to the EU F-BI comes from EU forest, all of which are subject to member-state law requiring sustainable forest management. Of the remainder, most comes from Russia and other neighbouring countries, as well as N. America and very small amounts of tropical woods. The last two sources provide mostly hardwoods.

However, EU-grown wood is becoming increasingly sought after through growing competition, already from bio-energy and in the future from the emerging bio-based industries. Although wood prices fluctuate, any increases further squeeze thin margins which cannot be compensated elsewhere. For example, the F-BI's other raw materials are often imported and hence prone to price volatility. Their bought-in process energy is more expensive and both their environmental and social standards are higher than those of most global competitors. Demand for "traditional" wood-based products, such as in construction and furniture, remains depressed; consumption of some paper grades and printed paper goods is declining in the face of electronic media and is only partially compensated by increases for other formats such as printing on plastics and textiles.

As a complement to the Commission Communication "A new EU Forest Strategy: for forests and the forest-based sector", this Staff Working Document (SWD) sets out descriptions of the EU F-BI's overall sectoral economic and technological outlooks, sub-sectoral profiles of its four component industries. It then identifies the set of major challenges facing them as a prelude to identifying a series of remedial activities to help address those challenges. It is thus

[1] NACE Rev. 2, Divisions 16, 31, 17, 18.1. Relevant wood harvesting aspects (NACE Rev. 2, Group 2.2) are also covered in this Blueprint. NACE Rev. 2 Regulation is available on: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:393:0001:0039:EN:PDF.

[2] Commission Communications: *A Stronger European Industry for Growth and Economic Recovery: Industrial Policy Communication Update* (COM(2012)582 of 10.10.2012) and *Integrated Industrial Policy for the Globalisation Era: Putting Competitiveness and Sustainability at Centre Stage* (COM(2010)614 of 28.10.2010).

a blueprint which seeks to address the sectoral issues in a comprehensive, multi-layer manner, in order to help improve the global competitiveness of the EU F-BI through: stimulating demand for existing and new, innovative products in both the EU and other markets; stimulating resource and energy efficiency in manufacturing processes and throughout the life cycle of products; encouraging the adding of value to products whilst cutting the costs of production and delivery to market. To underpin these initiatives, radical steps in innovation, research and development for processes and products are needed, together with education, training and skills development and their updating suitable for the move towards the 2050 economy.

**EU Forest-based Industries: value chains structure**

The rationale for the EU forest-based industries (F-BI) is their direct or indirect foundation to a greater or lesser extent on a common raw material: wood, which is derived for the most part from sustainably managed EU forests. For example, the woodworking industries (sawmilling, wood-based panels manufacture; builders' carpentry & joinery; wooden packaging and other wooden articles) and pulp & paper manufacturing and converting, are clearly wood-based, even though the latter get over half their "wood" raw material in recycled form.

However, whilst much furniture contains wood, indeed it is that sector's biggest material use by volume, the furniture industry also uses many other materials and adds most of its value through using design to produce consumer goods. Similarly, the printing sector uses paper, a forest-based material, for printing books, leaflets, posters and other documents, but these form only a small part of its overall output which covers a range of materials and formats. However, for convenience and brevity, the term "forest-based industries", abbreviated to "F-BI", is retained here as a convenient shorthand to cover all these four sub-sectors. Based on these, four distinct but inter-linked F-BI value chains have been identified, so as to include the F-BI's emerging bio-economy component. These do not necessarily conform to the four sub-sectors identified above but rather show the linkages between them:

- wood & wooden[3] products: production of round & sawn wood, panels, other wooden products, including wood fuels; cork processing;
- furniture and furnishings of wood and other materials, their components and by-products;
- cellulose fibre[4] pulp, paper & paperboard manufacturing and converting; printing and paper-media publishing; precursors for textiles;
- wood bio-refineries, refining ligno-cellulose[5] into: transport bio-fuels; composite materials and chemical feed-stocks and products.

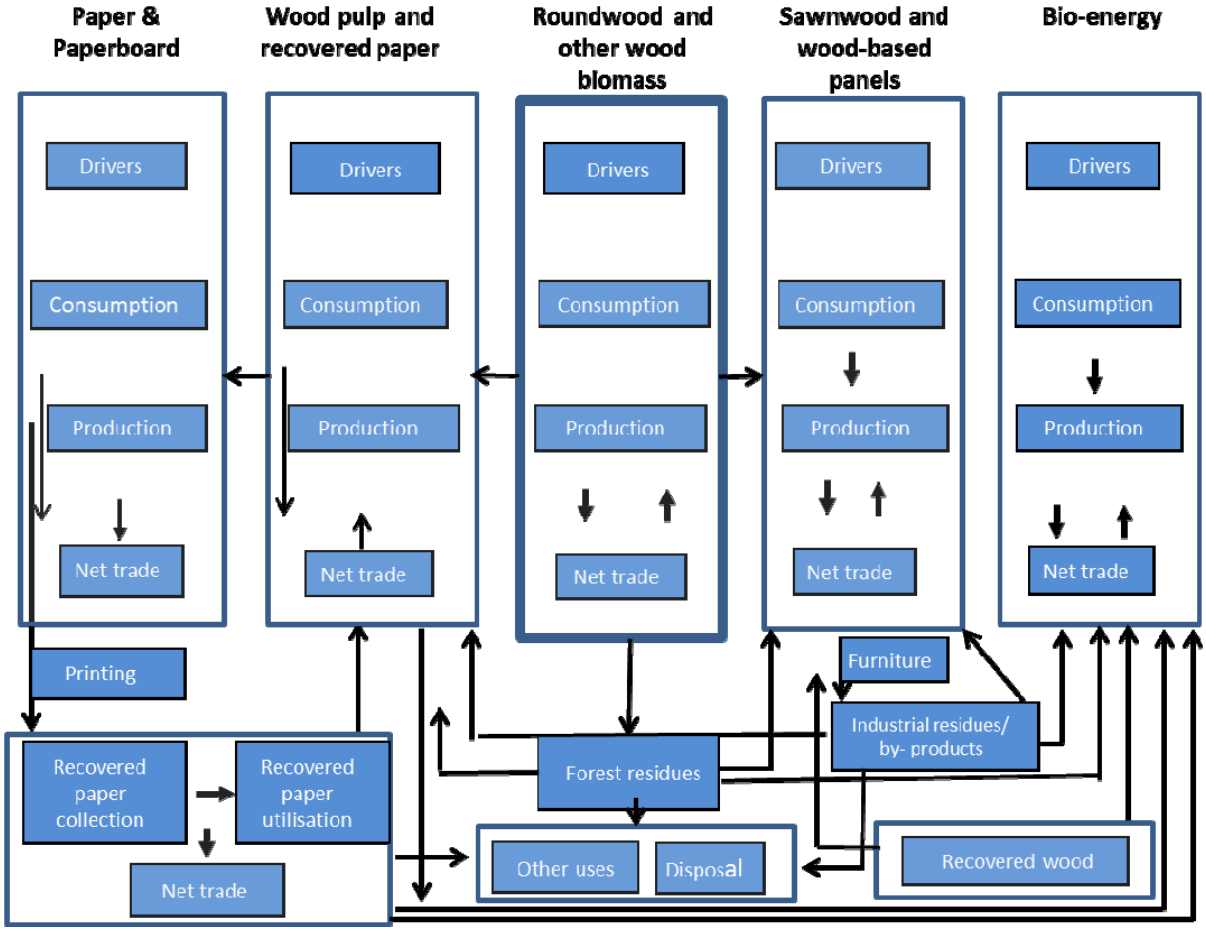
[3] Wood which is visually recognisable.

[4] Not visibly recognisable as wood but its cellulose not transformed.

[5] Transformed cellulose.

These value chains should not be seen either as entirely parallel to one another or in isolation from other economic sectors. Rather, they are inter-linked as a matrix of activities and material and value flows, as can be seen from the following diagram[6].

**Figure 1: Wood raw-material flows within and between the EU F-BI sub-sectors (woodworking, furniture, pulp & paper, printing) and the bio-energy sector**




Source: Indufor study

[6] Indufor Oy (2013). *Wood Raw Material Supply and Demand for the EU Wood-processing Industries*. Study for DG Enterprise and Industry.

## II. Sectoral economic outlook

There are differences between and within the F-BI values chains as to company sizes, cost structures and productivity. Some of their features are indicated in the following table.

**Table 1: EU forest-based industries - key structural statistics, EU-27,** monetary data in current basic prices, 2010-2011

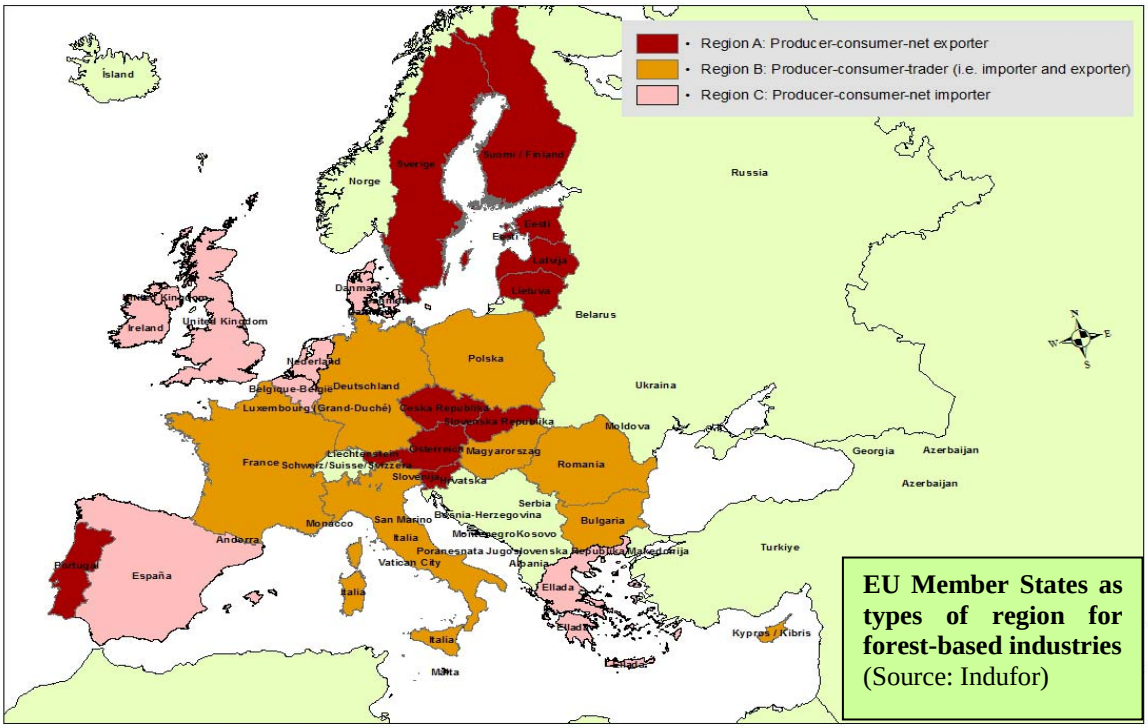
| F-BI sub-sector/ Parameter | Woodworking | Furniture | Pulp & paper manufacturing & converting | Printing | Total |
|---|---|---|---|---|---|
| N° firms | 184 000 | 130 000 | 21 000 | 120 000 | 455 000 |
| N° jobs | 1 093 000 | *1 000 000* | 647 500 | *770 000* | *3 510 500* |
| Production value (M€) | 115 702 | 92 000 | 168 000 | 85 535 | 461 237 |
| Turnover (M€) | 122 264 | 96 000 | 180 000 | 88 009 | 486 273 |
| Added value (M€) | 31 200 | 30 000 | 41 000 | 32 477 | 134 677 |

Source: Eurostat (sbs_na_ind_r2), estimates (in *italics*) by DG Enterprise and Industry

Three of the four F-BI sub-sectors (woodworking, furniture and printing) are dominated by SMEs and moreover micro enterprises, having less than 10 employees each, with relatively few large firms and only a handful of very large and multinational companies. In contrast, the pulp and paper sub-sector is relatively concentrated with medium and large firms being the norm and quite a few very large and multinational firms. However, the larger firms are concentrated in pulp and paper manufacturing, whereas amongst the paper and board converting side, SMEs are more common.

There are also variations across the EU Member States as to both the absolute and the relative importance of the F-BI sub-sectors nationally, their consumption of F-BI products, and their export performance. Some are net exporters of wood-based goods, others net importers and yet others are both producers and traders, as shown by map below.

**Figure 2: Map of EU-27 Member States as types of region for forest-based industries**




These differences explain why the effects experienced from the downturn have been modulated across the MS and F-BI sub-sectors. However, the financial and economic crises have only amplified the decline of the F-BI's share of EU manufacturing and of its employment that could already be observed beforehand. For example, F-BI employment fell over the whole of the period 2000-2011 (See Table 2), around 26% overall, but varying between estimated 30% for furniture and 20% for woodworking, all far higher than the decline in the EU manufacturing average of 14%, while employment for the economy as a whole increased by 6%. Figure 3 depicts a drop-off in F-BI jobs over a whole decade, but reinforced since 2008 by the downturn.

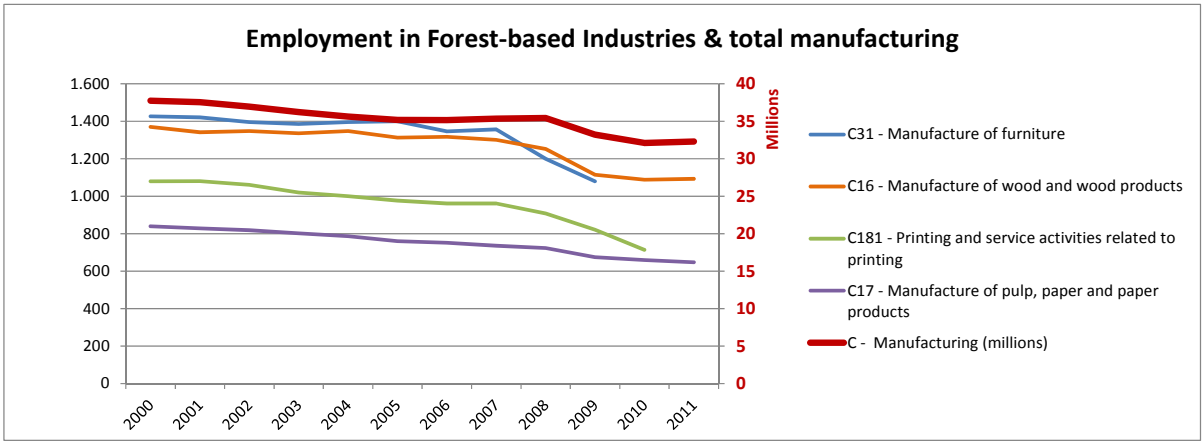
**Table 2: Change in employment in the EU forest-based industries, 2000-2011**

| NACE activities | Change 2000-2011 (%) |
|---|---|
| TOTAL - All manufacturing activities | - 14% |
| C16 - Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials | - 20% |
| C17 - Manufacture of paper and paper products | - 23% |
| C18 - Printing and reproduction of recorded media | - 29% (estimate) |
| C31-C32 - Manufacture of furniture; other manufacturing | - 30% (estimate) |

Source: DG Enterprise and Industry on Eurostat (nama_nace64_e) (NB Printing strictu sensu is only C18.1)

Shown graphically, as in Figure 3, the trend of declining employment is even more evident and seems to be accelerating.

**Figure 3: Employment in the EU forest-based industries**




Source: Eurostat (nama_nace64_e, sbs_na_dade, sbs_na_dfdn, sbs_na_ind_r2)

**Table 3: Change in number of F-BI firms by sub-sector, 2003-2010**

| Year<br>Sub-sector | 2003 | 2010 | Change (%) |
|---|---|---|---|
| Woodworking | 200 144 | 184 000 | - 16 144 (-8%) |
| Furniture | 149 772 | 130 000 | - 19 772 (-13%) |
| Pulp & paper | 19 516 | 21 000 | + 1 484 (+8%) |
| Printing | 131 434 | 120 000 | - 11 434 (-9%) |
| **Total** | **500 773** | **455 000** | **- 45 773 (-9%)** |

Source: Eurostat

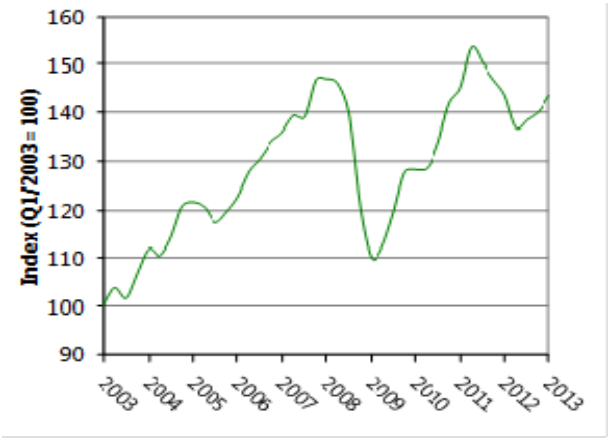
Despite a very small increase in the number of firms in the pulp and paper sub-sector, the overall F-BI trend since before the on-going economic and financial crises is negative, with over 9% of sectoral firms closing over eight years. Even more starkly, the F-BI share of overall EU GDP products has shrunk by about 30% over the last decade (Eurostat).

To overcome and reverse this downward trend, sustainable growth is needed, which must be brought about through increased competitiveness. This is a challenging prospect on both the supply and demand sides for the EU F-BI.

On the supply side, more wood from sustainably managed EU forests would seem to be available since only 60% or so of the annual growth is harvested. However, EU harvesting costs are very high on a global scale, so increased wood demand may be met more cheaply on the global market. When prices are driven up by increasing domestic demand from competing end uses, including from the expanding and often subsidised bio-energy sector, this can even be positive for some parts of the forest-based sector value chains, such as forest owners and F-

BI revenues from by-products, e.g. sawmills which sell wood chips and sawdust to the pulp, panel and pellet industries. However, overall, the wood raw material costs increase (Figures 4 and 5) and most of the F-BI, especially the pulp and wood-based panels' manufacturers, cannot compensate either through by-products or sales prices.

**Figure 4: Global softwood sawlog price index, 2003-2013**




Source: UNECE FPAMR 2013

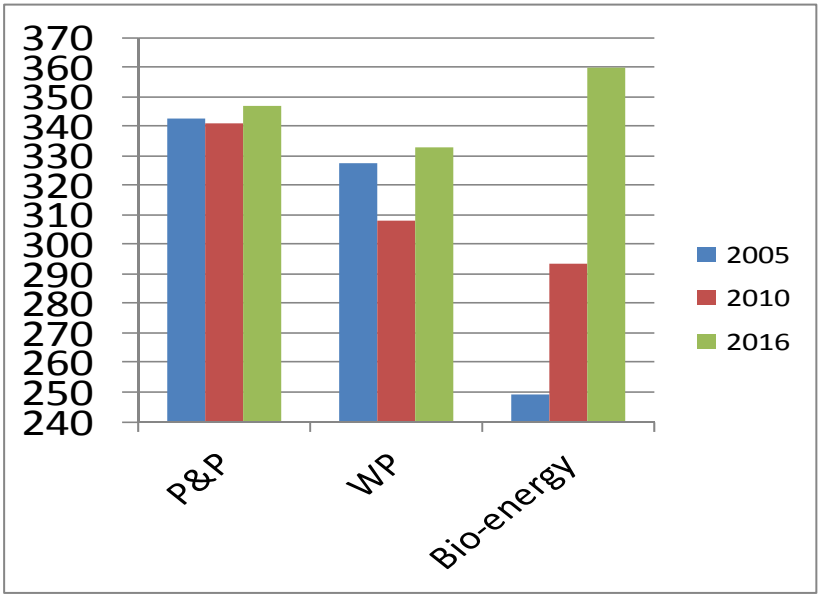
**Figure 5: Global wood fibre price indices, 1989-2013**


Source: UNECE FPAMR 2013

The following diagrams (Figures 6 & 7) project the competing demands for wood from the EU woodworking products (WP), pulp & paper (P&P) and bio-energy sectors. The second of these indicates that by 2016 (the Indufor study's forecast horizon) the EU will face a shortfall from EU sources of 63 $Mm^3$ of RWE per annum in trying to meet the EU renewable energy targets, as shown by the NREAPs (National Renewable Energy Plans[7]). Thus, if significantly more EU wood can't be mobilised, imports must fill the gap.

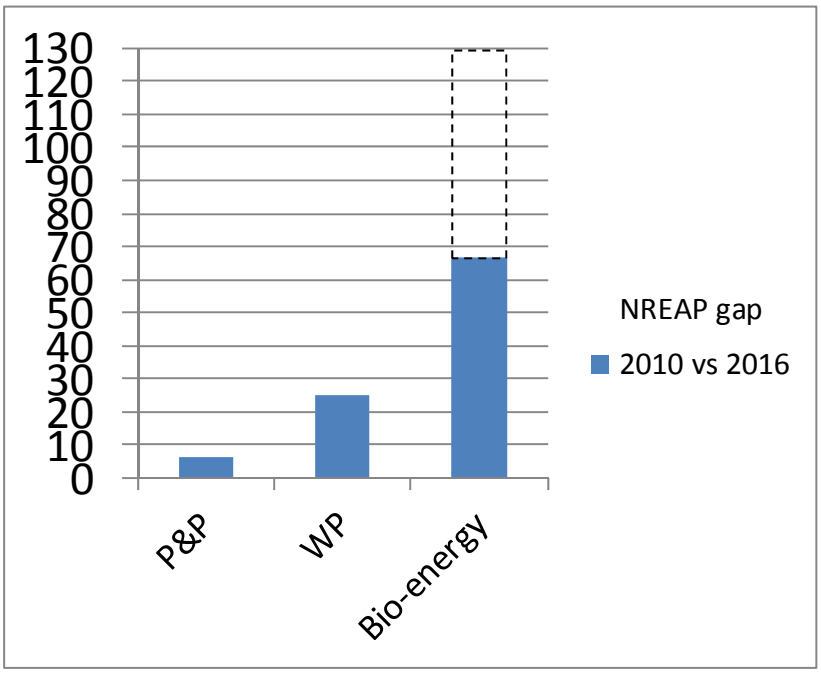
[7] Commission Decision of 30 June 2009 establishing a template for National Renewable Energy Action Plans under Directive 2009/28/EC of the European Parliament and of the Council (2009/548/EC).

**Figure 6: Total wood raw material uses in EU-27** Mm3 (RWE[8])




Source: Indufor study (NB for P&P and WP there is some double counting due to the "cascade" effect)

**Figure 7: Change in wood raw material use in EU-27** Mm3 (RWE)




Source: Indufor study

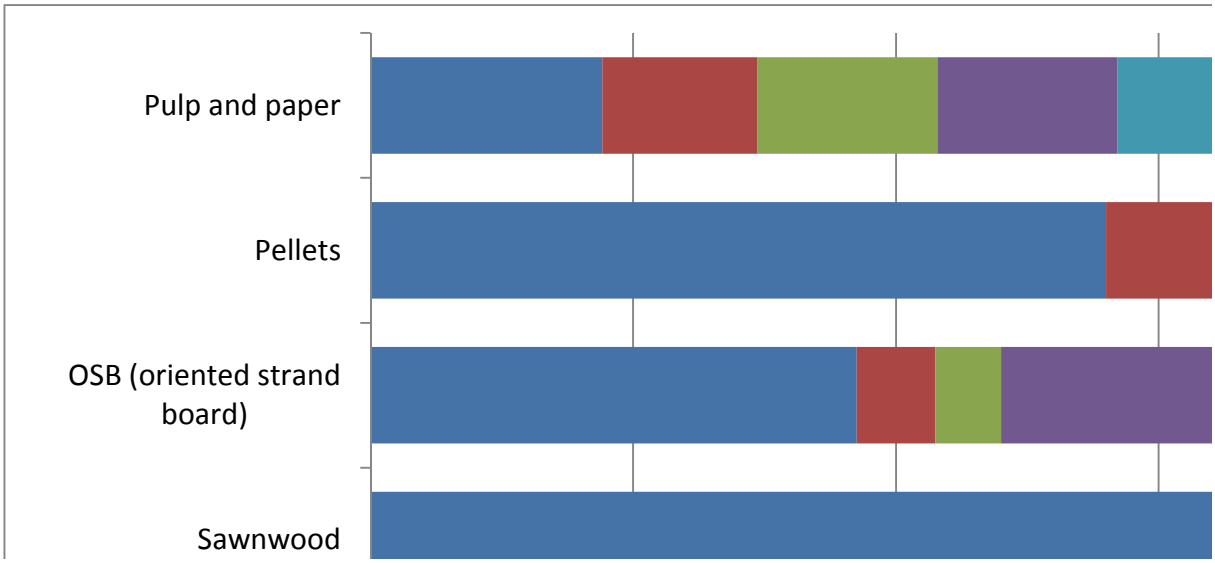
One source of such new imports will be fast-growing forest plantations in Latin America and Southeast Asia, which create a significant potential for increased and cheaper wood supply, especially for competitors of the EU in the pulp and paper sub-sector. Thus, to continue to

[8] RWE = roundwood equivalent, i.e. how much wood raw material is needed for a given quantity of product.

compete globally, even new investments in forests and pulp production by EU-based firms now tend to be in those regions. Meanwhile and in any case, wood cost remains a significant part of variable manufacturing costs for wood-based products, as shown by Figure 8.

At the same time, it should be noted that the existing small but significant supply stream of tropical wood to the EU, mostly hardwoods from developing countries, should not be directly affected by the increase in EU demand for wood biomass for energy and bio-based products, although those markets may offer opportunities for wood-exporting countries. Even now, the EU is a relatively big market for such countries and forest products often play a pivotal role in their economies. Therefore, vigilance is necessary to avoid the possibility of unintended consequences of EU policy changes, whether from renewable energy policies, the EU "Timber Regulation" (EU TR)[9] or other such initiatives. In this context, the EU FLEGT Action Plan[10], including the EU TR and voluntary partnership agreements (VPAs) with wood-exporting countries, as well as other EU Development Policy measures seek to address issues of this type.

**Figure 8: Analysis of manufacturing costs between F-BI sub-sectors.**



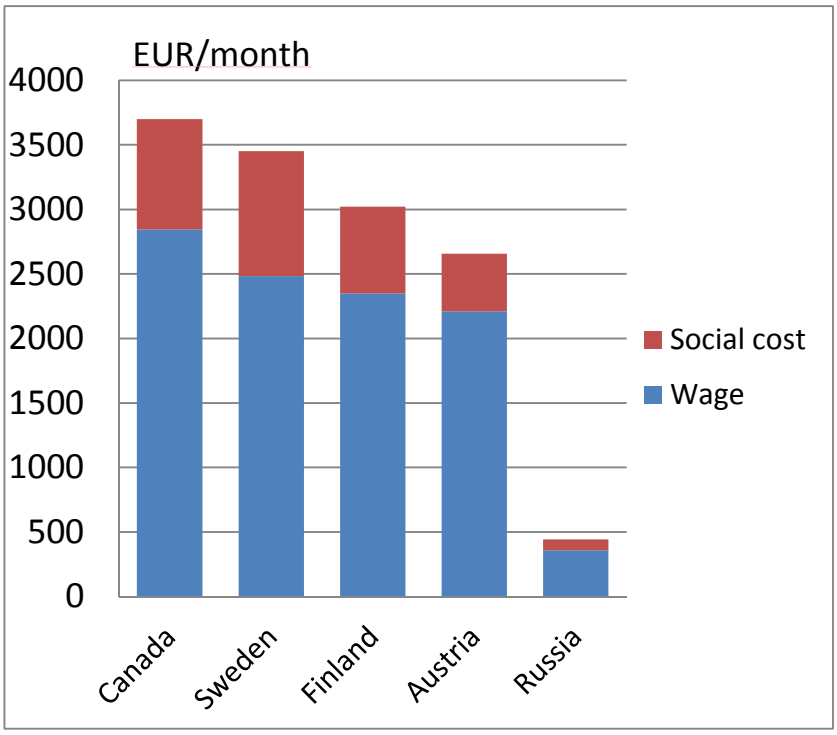

Source: Indufor study (NB "raw material" includes wood fibre and recovered paper)

[9] Regulation of the European Parliament and of the Council of 20 October 2010 laying down the obligations of operators who place timber and timber products on the market (995/2010).

[10] Commission Communication: *Forest Law Enforcement, Governance and Trade (FLEGT): Proposal for an EU Action Plan* (COM(2003)251 of 21.5.2003).

After wood, labour costs are very significant for the EU F-BI, especially in the labour-intensive SMEs, as indicated by Figure 9, showing labour costs for sawn softwood.

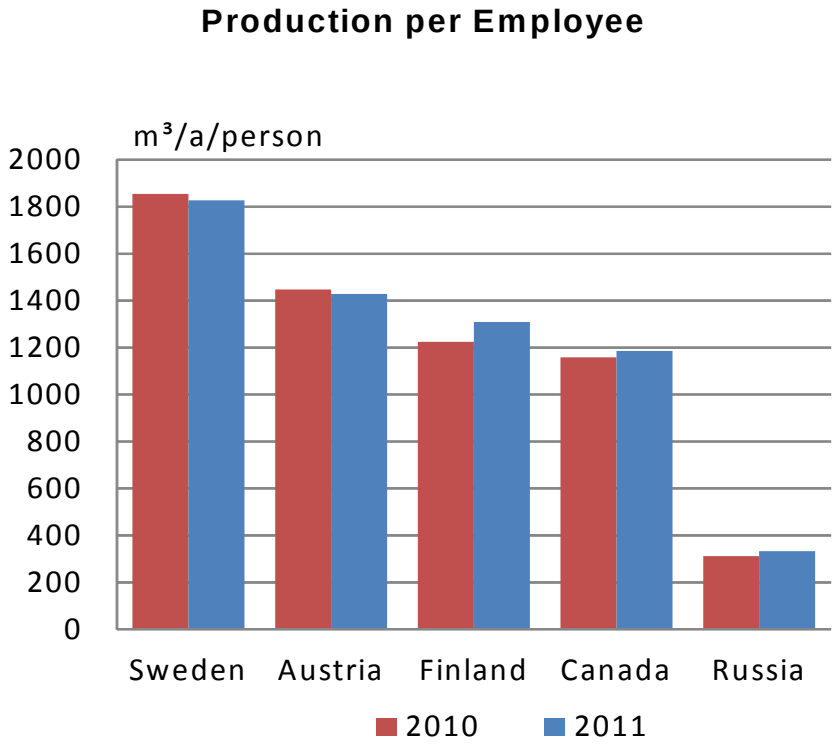
**Figure 9: Sawmilling labour cost (2011)**




Source: Indufor study

Up to now, the EU producers have been able to compensate high labour costs through high labour productivity. For example, the EU labour productivity (by volume) for sawn softwood is the highest in the world, as shown by Figure 10.

**Figure 10: Sawmilling sector – labour productivity**




Source: Indufor study

Figure 8 indicates that raw materials other than wood, of which the main ones are listed under "raw materials" in the challenges section below, also represent major cost components. Amongst these, energy is a significant cost item[11] for the F-BI, especially for paper and wood products such as pellets. Whilst bark and wood–processing residues can be used for heat process energy, e.g. for drying by the woodworking and pulp and paper sub-sectors, and by some furniture manufacturers, much energy has to be bought in as oil, gas and electricity. In the EU, these fuels are all expensive, especially in comparison with those in other global F-BI producers, such as Russia and the USA, which have significant energy resources, and China which subsidises energy to manufacturers.

The EU's focus here must be on energy efficiency, as well as a wider use of bio-energy by the F-BI, both of which can alleviate the high price of bought-in energy to a certain extent. The effect of such energy efficiencies can be further enhanced when combined with resource efficiency, including for the use of expensive wood. Nevertheless, the energy price differential with competitors cannot be equalised and, in any case, both energy and resource efficiencies represent technological challenges for the EU F-BI.

[11] As indicated in Section V under "Coherence of EU legislation and costs arising", a cumulative cost assessment (CCA) is envisaged, in line with the Commission's Industrial Policy Communication (COM(2012)582).

## III. Sectoral technological outlook

The main technological challenges for the EU F-BI are:

- How to innovate and develop new products and services to meet rapidly changing societal needs, including up to 2020, 2030 and 2050?
- How to design and develop new production processes that use less wood, other raw materials and energy, while minimising waste, and are capable of manufacturing completely new groups of products?
- How to educate and update the knowledge and skills of the F-BI's researchers and workforces to be able to develop such products and implement such processes?
- How to produce wood more cost-effectively and sustainably from existing EU forests and other wooded land in qualities and assortments better matched to manufacturing needs?

### How to innovate and develop new products and services to meet rapidly changing societal needs including up to 2020, 2030 and 2050?

The so-called bio-based economy (see below) is a vision of the future in which some of the existing products of our everyday life, many of which are currently derived from unsustainable fossil-based natural resources, would be replaced by those based on biomass feed-stocks, provided it is economic to do so. One of the major feed-stocks for this would be wood. Whilst this could on the one hand increase competition for wood raw material and help to increase its sustainable supply, it could on the other hand open the door to a whole new range of bio-based, wood-derived products for building, packaging, hygiene and health care, etc. Research in this area is thus essential, although attention should be paid to avoid a technology driven production of goods. One particularly promising area of research is nano-materials, i.e. those in which the structure of the wood or wood-derived material is modified at the microscopic level. These can have such diverse applications such as the versatile nano-pulp for making e.g. super-absorbent hygienic products and light-weight car parts, which can safely bio-degrade after use. Other potential products include intelligent packaging products. Currently, such products are expensive to make and not yet available at the level of a pilot plant. But breakthroughs must come through fundamental and applied research, investment and perseverance.

Moreover, significant benefits for the sector could come through innovations to current industrial processes (e.g. kraft process) aiming at improved energy efficiency and adding more value to the raw materials. Such innovations could provide, in parallel to the traditional outputs of the industry, new products that could be utilised by other industrial sectors, with creations of new "bio" value chains and higher value creation by the FB-I. The deployment of these new processes on the industrial scale could be easier as they could be integrated on existing production facilities, providing impact in the short term.

As regards second generation biofuels, economies of scale are bringing down costs.

**How to design and develop new production processes that use less wood, other raw materials and energy, while minimising waste, and are capable of manufacturing completely new groups of products?**

The development of very thin wood veneers and of light-weight paper grades, such as for packaging, are examples of doing more with less fresh wood fibre. Block-boards, laminated veneer lumber and small parquet are examples of upgrading small-dimension and/or low-quality woods to higher-grade uses. Engineered wood products[12], such as structural I-section beams and "glu-lam" (glued-laminated) beams for flooring and roofing can use low-grade and small-dimensioned wood into highly performing structural products with predictable properties.

Integration of the "cascade principle"[13] into the use of raw materials such as wood not only helps store for longer, in the form of wood-based products, the carbon they have sequestered but can also provide more added value and jobs than can the direct use of wood or its residues for energy. At the end of the "cascade" sequence, the post-consumer recovery of both wood and paper help delay the energy use of wood even longer and also increase the overall supply of industrial wood fibre.

Notwithstanding the ideal application of the "cascade principle" for using wood, it should however be borne in mind that, according to economic and local circumstances, such as economic downturns or locations without viable alternative wood markets or energy supplies, changing demands or forest fire prevention, the use of wood for bio-energy may sometimes be the practical first or only option. Moreover, as part of a mix of outputs from woodworking plants, wood-based fuels (e.g. pellets) or excess process bio-energy (in the form of heat and/or electricity) derived from wood residues can be profitable outlets for the woodworking industries themselves, if sold to the market, including electricity to the public grid. In this context, pulp mills and even some of the larger sawmills and panel mills may even be able to run as some of the "wood-based bio-refineries" and produce transport bio-fuels amongst their products.

Wood fibres can be used and recycled in the F-BI in the most optimal way for the highest possible added value. For example, in the pulp and paper manufacturing industries, 1 $m^3$ of wood raw material can create products having a total wood-equivalent volume of up to 2.38 $m^3$ and a job multiplication factor of five vis-à-vis using wood directly for bio-energy. This ratio rises to 7:1 if the upstream and downstream value chain activities are included (Source:

[12] EWP: customised wood-based materials & components, having designed, uniform and predictable properties.

[13] According to "cascade principle", wood resources are used in the following order of priority: production and use of wood-based products; post-consumer recovery (collection); re-use of products; recycling into other wood-based products; use as bio-energy source, based on e.g. affordability, adding value & maintaining and/or creating jobs (DG Enterprise and Industry definition: also check Indufor study).

Pöyry[14] for CEPI). As regards added value, pulp and paper making can double the value generated by bio-energy and, together with their ancillary activities, the ratio can be up to five times overall. These figures should increase with future technological advances.

Using less wood or wood fibre to make a given product and/or deriving it from residues or recovered material, contribute to resource and energy efficiency. In using recovered paper fibre in making recycled paper, less fresh wood and energy are used per unit of production. The reliance on bought-in energy has been also reduced in the F-BI (e.g. woodworking, furniture and pulp & paper) by using generating and consuming bio-energy from biomass, thus increasing their energy self-sufficiency. Furthermore, when the production process itself is rationalised, overall energy use can be further reduced. When both the product itself can be redesigned to use less material and its production process can be further optimised, significant material and energy efficiencies can be achieved. If on top of these achievements the product has a higher added value, its overall competitiveness can be upgraded.

Fundamentally redesigning existing F-BI products and processes may offer significant scope for resource and energy saving, whilst the thermal properties of wood as a building and insulating material can help reduce the energy consumed in heating our buildings and make homes and offices of the future net energy generators.

**How to educate and update the knowledge and skills of the F-BI's researchers and workforces to be able to develop such products and implement such processes?**

The increased use of technology in conceiving, designing, developing and manufacturing both "traditional" and bio-based innovative F-BI products, as well as the ICT incorporated into process control, increasingly calls for highly trained and skilled F-BI researchers and production work-forces. Whilst "low-tech" traditional skills, e.g. for furniture making, can be passed on to a new generation of workers and technicians by word of mouth, demonstration, experience and supervision, new processes, products and markets call for high levels of academic qualifications, laboratory and workshop techniques and industrial awareness. Retraining is also essential to update existing knowledge and skills or replace them with new ones. Thus, appropriate course development, to be applied through life-long learning will be increasingly important, whether on the job or on-line. Investments in new types of knowledge and skills are also needed in order to seize the opportunities created by changing market and consumer demands, including to manage the shift to new business models. An example of good practice in this area is provided by the printing sector, which has developed a methodology for planning and executing socially responsible restructuring which it is currently implementing with the full support of the sector's social partners.[15]

[14] Pöyry (2012). *Employment and value added: a comparison between the European pulp & paper sector and the bio-energy sector*.

[15] Intergraf website: http://www.intergraf.eu/index.php?option=com_k2&view=item&id=103:the-future-of-the-european-print-industry-in-our-own-hands&Itemid=208

**How to produce wood more cost-effectively and sustainably from existing EU forests and other wooded land in qualities and assortments better matched to manufacturing needs?**

The steady but slowing expansion of EU forests and their accumulating wooden growing stock does not guarantee an automatic increase in usable wood supply to the EU F-BI. The problems of the so-called "fragmented forests", i.e. those in small ownerships, with sometimes unidentifiable owners and a lack of integration into F-BI value chains, are particularly difficult to resolve without the co-ordinated sharing of good practices evolved through applied experience. An increasing problem in this context is that the share of wood-based revenues in the total income of forest owners in many MS is decreasing, making market-based incentives less effective. Outside the forests, other wooded land, including parks, gardens and road-sides, can provide significant quantities of usable wood. However, the use of wood raw material from all forests and other wooded land must be done in a sustainable way, as detailed in the Commission Communication: "A new EU Forest Strategy: for forests and the forest-based sector". More information on the spatial distribution of forest resources and additional information, such as wood quality, dimensions and species, is also needed to assess and plan wood availability and its mobilisation for future uses, and to have a better communication throughout the value chain.

Whilst all wood can be used for energy production, at least theoretically, there are limits as to how flexibly different wood types can be used between different end uses within the F-BI, as indicated by Figure 11. This does not account for further limitations caused by wood species, qualities and dimensions.

**Figure 11: Qualitative substitutibility of different wood sources between competing end uses**

| Raw material types | | Sawn-wood | Ply-wood | Pulp, Paper & Board | Oriented Strand Board (OSB) | Particle Board | Medium Density Fibreboard (MDF) | **Pellets** | **CHP** Combined Heat & Power |
|---|---|---|---|---|---|---|---|---|---|
| Wood | Pulpwood | | | | | | | | |
| | Logs | | | | | | | | |
| | Forest residues | | | | | | | | |
| Industrial residues | Bark | | | | | | | | |
| | Chips | | | | | | | | |
| | Sawdust | | | | | | | | |
| Recycled material | Recovered paper | | | | | | | | |
| | Recovered wood | | | | | | | | |

Source: Indufor Oy

**RAW MATERIAL SOURCES FOR VARIOUS END USES**

*NB: wood products' raw materials are further limited by species, quality and dimensions (not shown) but bio-energy can use all wood sources.*

**Strong usage**

**Medium usage**

**Low usage**

**No usage**

As indicated in detail below, any improvement in wood mobilisation must overcome not only physical (e.g. technical and logistical) and cost issues but also be based on easier location of suitable species, dimensions and qualities of wood raw material. Topographical surveying and infra-red or laser-based forest inventory can help to assess economically the potential harvesting output of forests, including fragmented areas, both in terms of the equipment needed and potential market outlets for the wood produced. Moreover, the further

development of tools for forest modelling and inventory which allow optimisation of the harvesting operations, with consequent cost reduction, providing early information on the standing trees (quality, amount, etc..) and allowing information exchange (e.g. demand, value, etc.) in near "real time" among the actors along the value chain (owners, customers, etc.), could be valuable in helping to optimise harvesting operations and costs, sustainably harvest more wood in Europe and provide the forest owners with better income for their raw material. Further use could be made of such inventory results through their harmonisation at the macro level, e.g. between Member States.

As regards the costs, a judicious use of incentives, such as a re-direction of the subsidies, currently given to the energy supply industry for generating bio-energy, into mobilising more wood from unharvested forest areas, such as fragmented forests, could:

- provide more wood raw material to the market on an equitable basis for all end users;
- reduce/eliminate the cost differential for wood raw material between the energy industry and other wood users, such as the EU F-BI;
- help improve the forests by stimulating their renewal and hence maintain or even improve bio-diversity.

Such forest improvement could include: wood quality, age-class structure, health, robustness against biotic and abiotic threats (e.g. disease, fire prevalence and intensity, climate change), since forest operations such as thinning and final felling stimulate not only a resurgence in the growth of uncut trees but also help to improve bio-diversity by allowing light to reach the forest floor.

At the sawmill level, computed tomography (CT) scanning can then be applied to harvested roundwood to identify the best out-turn from individual logs or whole trees. Following sawmilling, automated stress grading of sawnwood can ensure that individual wood beams meet exacting structural and other standards.

## IV. EU Forest-based Industries (F-BI) by sub-sectors:

The current composition of the EU Forest-based Industries includes the sub-sectors listed below. Each of these sub-sectors is examined in turn as to its key features, main challenges and opportunities.

a) Woodworking industries
b) Furniture industry
c) Pulp & paper manufacturing & converting industries
d) Printing industry

**EU Forest-based Industries (F-BI): historical rationale:**

The F-BI definition has evolved to reflect the changing structure, perspectives and needs of the sectoral industries concerned. When the Advisory Committee on Community Policy regarding Forestry and Forest-based Industries (AC F-BI) was first set up in 1983[16], the forest-based industries included: the mechanical wood industry (i.e. woodworking), the pulp, paper and board manufacturing and converting industries, the printing and the publishing industries. This grouping was confirmed in the Committee's amended decision in 1997[17]. However, in its 2008 Communication[18], the Commission defined the EU forest-based industries as: the woodworking industries, the pulp and paper manufacturing and converting industries and the printing industries, reflecting the shift of focus of large parts of the publishing industry into electronic media.

The EU F-BI form a sectoral division of the EU's Industrial Policy, a complementary Union competence under Art. 6 TFEU[1]. Conversely, there is no Treaty basis for forest or forestry activities per se. The term "forest-based sector" includes the upstream forest resource and ancillary forestry activities as well as the downstream forest-based industries.

### a) WOODWORKING INDUSTRIES

*Key features*

The EU woodworking industries include some 184,000 companies generating an annual turnover of around 122 billion Euro on a production value of over 115 billion Euro and generate an added value of over 31 billion Euro. They employ more than 1 million workers. Most companies are small or medium-sized; the exception being the wood-based panel sub-sector and a handful of sawmills, which have a number of large enterprises, a few belonging to multinational companies.

[16] Commission Decision of 11 May 1983 setting up a Committee on Community Policy regarding Forestry and Forestry-based Industries (83/247/EEC)

[17] Commission Decision of 9 December 1997 amending Decision 83/247/EEC (97/837/EC)

[18] Commission Communication: *Innovative and sustainable forest-based industries in the EU: A contribution to the EU's Growth and Jobs Strategy* (COM(2008)113 of 27.2.2008)

The main sub-sectors are: sawmilling; wood-based panels; builders' carpentry & joinery; flooring and other wooden articles. Overall, the main uses of sawnwood, carpentry & joinery are in construction and furnishings. The main uses of wood-based panels are in furniture, flooring and non-structural wall and roofing panels. Accordingly, the EU woodworking industries have been heavily affected by the economic and financial crises. As can be seen from Figure 3, the long-term gradual reduction in the number of sub-sectoral firms between 2003-10, during which period 8% of companies went out of the market, has been sharply accelerated from 2008 onwards.

*Main challenges*

The main challenges facing the woodworking sub-sector on the supply side are: the legal and/or sustainable availability of wood raw material; roundwood and other material costs, whether from EU or imported sources and the lack of optimal wood mobilisation strategies; high energy and labour costs and an ageing workforce. Additionally, the problem with a shrinking workforce due to an ageing population in the EU and urbanisation, both factors which make, in particular, the mobilisation of wood difficult and more costly, should be stressed. The solution to this problem calls for increased productivity through technological development, mainly in the harvesting of timber. On the demand side the challenges are: the reduced demand from the construction sector and from the pulp subsector; competition from low-cost imports; increasing scrutiny of wood sources, especially for public procurement; an increasing need for product and process innovation in the face of costly finance, low profitability and hence low investment in plant and skills.

Voluntary chain-of-custody certification, indicating the origin of wood from sustainably managed forests via an identified supply chain, has been an increasing feature of EU wood supply over the last 15 years. Since March 2013, the EU "Timber Regulation" (EU TR)[19] has banned illegally harvested wood from the EU market and required legal wood which is placed on the market to undergo a due diligence process, with traceability upstream to its source and downstream to traders. A small but significant number of other developed markets make comparable legality requirements (USA, Australia, Japan, Switzerland). However, such measures should not lead to unintentional and unexpected implications for timber trade flows.

All wood and wood-based products placed on the EU market are subject to the EU TR but, even if they pass muster, low-cost imports often have an added market advantage over their EU counterparts if their production is subsidised and/or they do not have to meet the EU's high environmental and social standards. In some cases, even mandatory EU technical standards are flaunted, such as has been the case with some building components, like imported plywood which was apparently CE-marked but did not meet those requirements. The consequences of such violations are potentially deadly.

[19] Regulation 995/2010.

*Opportunities*

Wood is a natural, renewable and environmentally friendly raw material (carbon storage, reusable, recyclable, combustible) and has excellent thermal properties. However, it is also a heterogeneous material, varying by species, dimension and quality. Whilst such variations can limit the substitutability between different wood types (see above) and make it a difficult task to manufacture standardised products, wood's visual artefacts give scope for design for both functional and cultural uses. It is also a healthy life-style material.

Even though the role for wood in "traditional" construction applications, such as window and door frames, doors and flooring, may remain curtailed by the on-going crises, its potential use in renovation, retrofitting and wood-framed construction is enormous. Even without new buildings going up, existing ones have to be maintained and refreshed, to which end, wood offers a consumer-friendly and healthy material, the natural surface of which can often add character to refurbishing and furnishings of existing buildings. Likewise, retrofitting of and extensions to the existing building stock can benefit from wood's efficient thermal and acoustic properties at competitive prices.

These applications, together with new wood-framed buildings (for homes, offices, functional buildings such as wide-span sports halls, bridges and other structures) are part of what is increasingly referred to as "sustainable construction", in which durable, low-impact and energy-efficient solutions are sought. Whether in structural or non-structural applications, for new buildings or for renovation, wood can help improve the energy performance of buildings on a life-cycle basis by harnessing its insulating properties to reduce heat loss and so reduce energy costs. Wood-framed buildings are well suited to pre-fabricated manufacture, which can reduce assembly time and material waste on the construction site. Scope also exists for wooden building in zones prone to earthquakes, where specific wood-framed structures have been proven to be more resistant to tremors.

Due to its natural structure, wood is permeable and this property can be used to impregnate it with substances to prolong its natural life time or to combine it into so-called "wood bio-composites" for diverse uses such as: thermal insulation; acoustic panelling, specialist packaging and absorbing liquids. Such enhanced applications can add much value to relatively small volumes of wood material but require strategic development.

**b) FURNITURE INDUSTRY**

*Key features*

The European furniture sector employs around 1 million workers in 130.000 companies generating an annual turnover of around 96 billion Euro. It is a labour-intensive and dynamic industry, dominated by SMEs and micro firms, which produce kitchen, office, bedroom and other specialist types of furniture. Its success factors lie in creative capacity for new designs and responsiveness to new demands, ability to combine new technologies and innovation with

cultural heritage and style, highly skilled employees and performing production systems. The European furniture manufacturers set the trends at the global level, which is reflected by the fact that 12% of designs registered in the Office for Harmonization in the Internal Market relate to the furniture sector. The EU is also a world leader in the high-end segments – nearly two out of three high-end furniture products sold in the world are produced in the EU.

*Main challenges*

The European furniture sector faces enormous competition from countries having low production costs, in particular in the low- and mid-range price segments, where the EU share in world furniture trade has significantly dropped in the last decade. China's EU market penetration is growing rapidly and it is now the largest furniture exporter to the EU, supplying more than half of total furniture imports to the EU. The reliance on innovation and design as a competitive advantage of the European furniture sector, combined with an increase in global trade and digitalisation, makes it more vulnerable to weak protection and enforcement of intellectual property rights on the global markets.

The European furniture sector is also faced by structural problems. The ageing workforce combined with difficulties to attract young workers may lead to disruptions in maintaining a skilled workforce and continuity of traditions and craftsmanship. Furthermore, boosting research and innovation requires sufficient finance, which is often inaccessible to SMEs.

While the EU is the most open global market, protectionist measures exist on other international markets, creating market distortions. EU furniture producers face both duties on imported materials and semi-finished products used in furniture, and tariffs on their exports of finished furniture products, thus decreasing the sector's global competitiveness. Moreover, their operational costs are increased by environmental, sustainability and technical standards and regulations.

All the above factors, combined with the fact that the furniture sector has been severely hit by the recent crises, have led to a significant drop in the number of companies, jobs and turnover, from which the sector is still trying to recover.

*Opportunities*

In the light of these developments, the EU furniture sector has undergone significant changes – restructuring, technological advances and business model innovations, allowing it to be more export-oriented, and to focus on upgrading quality, design and innovation. Continuing investment in skills, design, creativity, research, innovation and new technologies can result in new products which are in line with the changing population structure, lifestyles and trends, as well as with new business models and supplier-consumer relationships. Moreover, research in advanced manufacturing technologies can result in the creation of high technology and knowledge intensive jobs, which would give the sector the attractiveness it needs towards the new generations. This could help to rejuvenate the sector while keeping it highly competitive on the world stage.

European furniture manufacturers being recognised world-wide for their quality and design also creates opportunities for the sector to further seize other markets, in particular in the high-end segments and emerging markets. The synergies with construction and tourism could also be exploited, building up on the sector's excellent track record in sustainability. Specifically, reliance on raw materials from sustainable sources used in the furniture production could have a positive impact on sales among environmentally concerned end-users within and outside the EU.

## c) PULP & PAPER MANUFACTURING AND CONVERTING INDUSTRIES

*Key features*

The European pulp and paper manufacturing and converting industries employ around 647.500 workers in 21.000 companies, generating an annual turnover of around 180 billion Euro, from the production of pulp as well as graphic, hygienic, packaging and specialised paper grades and products. The pulp and paper manufacturing sector is energy- and raw materials–intensive, with high capital costs and long investment cycles, and has an excellent track record in resource-efficiency and innovation. Over the last two decades, it has substantially reduced all environmental emissions and also water and energy consumption, effectively de-coupling all of these from production growth, thanks to improved process efficiency. It has become more energy self-sufficient and less $CO_2$-intensive by generating more than half of its primary energy from biomass. Thanks to the voluntary, industry-led initiatives in addition to legislative measures, the paper recycling rate in Europe exceeds a high level of 70% and raw materials used in paper and board production and converting come from sustainable sources. The high level of expertise and continuous research and innovation well position these industries to exploit new business models, develop novel products and applications, and technologies, progressing toward a low-carbon bio-economy.

*Main challenges*

Overall paper consumption in Europe has stagnated, due to the economic slowdown and also structural developments. A continuing decrease in graphic paper consumption is expected as a result of the growing pace of digitalisation and changing lifestyles. However, this is counter-balanced by growth in packaging and hygiene papers, mainly due to demographic trends in Europe. Innovative business models and products create new opportunities for the sector, however, these require new skills and education.

The pulp and paper sector is increasing its share of exports outside the EU. Even so, tariff barriers, applied to nearly half of the exports and protectionist subsidies for rival goods, create an uneven playing field, further restricting market potential. On the raw materials supply side, taxes and exports duties imposed by EU trade partners on wood exports, notably by Russia, also raise concerns, especially when combined with heavy bureaucracy. Fibre raw material, from primary and secondary sources, represents the highest share of production costs, thus its availability at affordable prices is crucial for the sector.

The demand for domestic EU wood supply is increasing from other end-users, notably bio-energy. Increasing mobilisation of wood in a sustainable way and developing new, innovative ways to further optimise the added value from raw materials would help to match wood supply and demand. To this end, progress is needed to increase forest management efficiency as part of an overall policy framework supporting the sustainable supply and cascading use of wood resources, in addition to energy efficiency. The paper recycling rate in Europe is very close to its maximum limit, as determined by deteriorating quality and the non-collectable and non-recyclable fractions. Improvements in collection and sorting systems and technology can further increase the quality and availability of the secondary raw material. However, its supply may also be challenged by the increasing recovered paper exports to third countries, notably to China.

Rising prices of energy in Europe, combined with an increasing difference in gas prices compared to North America, also place the sector at a global competitive disadvantage. The EU environmental, climate change, energy and transport policies also have major influences on the future of the sector. The right and coherent regulatory framework is thus essential to support sustainable growth, investor's certainty and level playing field.

*Opportunities*

Continuous technological improvements can further reduce environmental impacts and optimise the use of resources, in particular raw materials, water and energy. New advanced and more efficient processes can also offer innovative ways to develop new products and applications based on cellulose fibre, generating more added value. Breakthrough technologies, such as to reduce heat use in paper production through reduced water consumption and improved paper drying processes and to develop new products, are needed, however, to achieve the sector's ambitious objectives for the 2050 Roadmap towards a low-carbon bio-economy of 80% $CO_2$ reduction and 50% value growth by 2050[20].

The European pulp and paper sector is seizing the opportunities of a bio-based economy. New business concepts will allow it to use the entire potential of the raw materials and by-streams of the forest-based sector efficiently to produce a broad range of high added-value products and novel materials for use in the textile, food and pharmaceutical industries, bio-based fuels and chemicals, alongside traditional wood-based products. In this framework, it is also important to develop innovative processes and technologies suitable for integration in the existing production facilities, as this could allow for faster industrial-scale deployment, delivering a positive impact in the shorter term, without having to wait for the phasing out of the running plants.

[20] CEPI (2011). *Unfold the future – The Forest Fibre Industry – 2050 Roadmap to a low-carbon bio-economy.*

## d) PRINTING INDUSTRY

*Key features*

The European printing sector covers 120.000 companies that employ around 770.000 workers, generating an annual turnover of around 88 billion Euro, from printing on a number of media, including paper, plastics, textiles, etc., and using a series of technical processes. The sector is dominated by family-owned, small and micro companies, operating mainly on domestic markets. Such high fragmentation facilitates reacting to niche markets and local needs, and gives flexibility to respond to consumers' variable orders in ever-shortening lead times and small print runs. The modern and efficient technologies available have increased the sector's productivity and ability to provide a complete range of services. At the same time, process automation has resulted in a change of the workforce profile from craftsmen to technicians. Investments in the printing sector are still primarily focused on production equipment, to the detriment of non-production activities, such as research and development and marketing. The sector is also characterised by a structural production over-capacity, estimated at up to 30%, as result of a declining demand for many printed products, increasing global competition and improved machinery productivity.

*Main challenges*

Changes in reading habits and the shift toward web-based media and e-solutions have significantly reduced the demand for print and revenue from paper-based advertising. A growth in printing output is mainly restricted to printed packaging and digital print. Competitors from low-cost countries, notably Asia, are capable to fulfil the European consumers' standards in terms of quality and are putting strong pressure on prices. Consequently, imports from China of printed products to the EU have increased more than four-fold over a decade.

The recent crises have had a major impact on the European printing sector, prone to economic cycle fluctuations. It exacerbated a decline in demand for printed products and increased financial institutions' reluctance to provide loans to SMEs often lacking financial capacity. The increasing costs of production in Europe, specifically energy, raw materials and labour costs, have further decreased the margin. The relative concentration of the printing sector suppliers places it also in a disadvantaged position.

In response to these challenges, the printing sector is undergoing a profound market transformation, with implications for company closures and redundancies. A risk of unemployment is intensified by the workforce's low mobility, partly due to specialised skills, unique to this sector but which are non-transferable. At the same time, opportunities arising from technological developments and new business models change the industry's skills and competency requirements, which will supplement, and in the longer-term replace, its ageing workforce and its traditional skills.

The European printing sector operates in a strict environmental framework and undertakes ambitious voluntary initiatives to demonstrate to consumers its commitment to environmental sustainability. Despite these efforts, the use of print on paper may give rise to a negative environmental perception, sometimes reflected by unsubstantiated environmental statements.

*Opportunities*

The structural overcapacity is optimised through market consolidation and socially responsible restructuring, adopted by printing companies to build economic sustainability while developing a 'culture of employability'. Strategic alliances are possible, although complex to implement and uncertain in these mainly family-owned companies. Conversely, the flexibility of small size companies facilitates exploring new niche markets.

The emergence of new media and technologies supports the building of closer relationships with customers and creating more added value through diversified services, such as offering print services with database management, and innovative processes, such as 3D printing. Integrating multi-media communication services not only widens the product range, but can also increase the attractiveness of the sector to new employees. The European printing sector can also benefit from increasing consumer awareness toward sustainability, and its excellent track record of environmental and social performance, by using them as differentiating factors from non-EU, low-cost competitors.

In this field research and innovation are highly needed to provide new paper-based products with added functionalities such as paper-printed electronics. These new products could exploit the sustainability of the support (i.e. paper) but provide the user with added functionality beyond simple printed paper, resulting in new markets and higher added value for the printing industry.

## V. Detailed description of challenges faced by the EU F-BI and remedial initiatives

This chapter describes more fully the F-BI sectoral challenges mentioned in the Communication "A new EU Forest Strategy: for forests and the forest-based sector", together with potential responses which could be foreseen for the EU, Member States, F-BI and other bodies to carry out.

These challenges do not exist in isolation from each other but as part of a functional system, depicted in Figure 12, in which the challenges are in bold italics. In this system, information and communication are pathways linking the other elements.

**Figure 12: The relationship between F-BI challenges**

<table>
<tr><th>Drivers</th><th>Tools</th><td rowspan="9">information & communication</td></tr>
<tr><td>stimulating growth through new & efficient processes, products & markets</td><td>innovation, research & technological development<br>trade and co-operation</td></tr>
<tr><td>resource and energy efficiency:<br>- raw material supply<br>- logistics</td><td rowspan="2">innovation, research & technological development<br>education, training, skills</td></tr>
<tr><td>human resource efficiency:<br>- structural adaptation<br>- labour productivity</td></tr>
<tr><td colspan="2">Drivers conditioned by:</td></tr>
<tr><td>international competition for EU and third-country markets.</td><td>innovation, research & technological development<br>education, training, skills</td></tr>
<tr><td>regulatory framework, including EU & MS policies, in particular those on:<br>- climate<br>- energy<br>- trade</td><td>policy coherence</td></tr>
<tr><td>Finance</td><td>EU & MS funds<br>Other: outside scope of F-BI strategy</td></tr>
<tr><td colspan="2">image (the resultant of a set of perceptions arising from information received, which may often be incomplete but also incorrect and/or biased).</td></tr>
</table>

### Stimulating growth

If one wants to increase the competitiveness of and demand for wood-based and related products and services, one must improve the quality and efficiency of existing processes, products and related services. In addition, innovative new processes, products and services can be developed and marketed, such as so-called "bio-based products"[21], which together with

[21] CEN Definition of Bio-Based Products used in the CEN-Report on Mandate M/429, Resolution of 3/11/09):

1. Bio-based = derived from biomass. 2. Biomass = material of biological origin, excluding material embedded in geological formations and/or fossilised. Note: This definition refers to the well-known short-cycle of carbon, i.e. the life cycle of biological materials (e.g. plants, algae, marine organisms, forestry, micro-organisms,

their specific processes could provide opportunities as part of the "bio-based economy". New business models are also vital, responding to changing societal needs through an integrated value-chain approach.

Follow-up by the F-BI of the Communication on "Strategy for the sustainable competitiveness of the construction sector and its enterprises"[22], will be crucial, for example by providing markets with competitive, performance-based solutions derived from wood - for building, retro-fitting and renovation, while realising synergies with furniture and paper-based products. Among proposed activities are the following:

1. stimulating favourable investment conditions - in particular in the renovation and maintenance of buildings and infrastructures - by promoting financial instruments such as loan guarantees or project bonds and encouraging national level incentives such as reduced VAT rates;

2. boosting innovation and improving labour qualifications and mobility by promoting the share of information on curricula, employment market and employer's needs;

3. improving resource efficiency and environmental performance, promoting mutual recognition of sustainable construction systems in the EU;

4. providing standard design codes of practice for construction companies making it easier for them to work in other Member States;

5. fostering the global position of European construction enterprises to stimulate good performances and sustainable standards in third countries.

To further underpin the communication's implementation, Member States could develop mechanisms, incentives and tools to encourage sustainable construction, retro-fitting and renovation, including appropriate and integrated sustainability objectives (environmental, social and economic) for construction schemes, as well as relevant objective criteria for rating systems - to be based on life-cycle assessments, in order to compare options.

In anticipation of a further communication (on sustainable buildings) which is under preparation, industry could complement such initiatives by identifying apparent EU and Member States' barriers to building products of natural and renewable materials, given their potential for improving the energy efficiency of buildings, and suggesting potential solutions.

In addition, improving information to customers on specific qualities of furniture, and possibly on other F-BI products, placed on the EU market, could facilitate their informed

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animals, and biological waste from households, agriculture, animals and food/feed production). 3. Bio-based product = product wholly or partly bio-based. Note: The bio-based product is normally characterised by the bio-based content.

[22] Commission Communication: *Strategy for the sustainable competitiveness of the construction sector and its enterprises* (COM(2012)433 of 31.7.2012).

decision-making. This could, in particular, promote products performing to high standards for the environment and human health throughout their life cycle.

Furthermore, the delivery of both current and new products from all the above four F-BI value chains can be expanded in existing and into new markets within and outside the EU. Exploring new markets outside the EU, especially in emerging economies such as the so-called BRICs, can assist the EU F-BI's competitiveness to be further realised. To this end, exports of EU wood-based and related goods could be facilitated by identifying tariff and non-tariff barriers and addressing them in bilateral trade negotiations. In this context, the F-BI sectoral information of the Market Access Data Base[23] (MADB - about import conditions in third-country markets) could be improved and the involvement of the F-BI sector in the Market Access Advisory Committee could be further strengthened, so as to play a more important role.

Simultaneously, active market development and trade promotion in existing and new markets outside the EU, including for SMEs, will continue to be carried out by Member States and also at EU level (e.g. through "Missions for Growth", EU Gateways).

**EU Resource and energy efficiency objectives**

**Resources:** Using the "cascade principle" increases raw material availability, enables more output from a given input and maintains or creates more jobs and added value for the economy[24], as well as – in the case of wood - delaying the release to the atmosphere of its stored carbon. The EU F-BI use or sell most of their wood-processing residues: in other product lines, as secondary raw materials or fuel, or as process energy. Thus, in addition to having high labour productivity, the F-BI are resource-efficient and so in line with the mainstay of the EU policy framework, the "Roadmap to a Resource Efficient Europe"[25]. In such cases where waste can become a resource in a virtuous cycle, it forms part of the "circular economy"[26].

**Energy:** After raw materials, energy represents a high proportion of EU F-BI production costs but its level varies between F-BI sub-sectors (see Figure 8). The EU F-BI generates much of its own process energy from its wood residues. However, energy bought in to the sector costs up to two and a half times that in the USA. Given little prospect in the EU of significantly decreasing per-unit prices for bought-in energy, savings in energy costs can only be made by the EU F-BI through wider generation of bio-energy and their further energy efficiencies.

[23] European Commission, DG Trade, Market Access Database: http://madb.europa.eu/madb/indexPubli.htm

[24] Mantau, U. (2012). *Wood flows in Europe (EU 27).* Project report for CEPI, CEI-Bois and EPF.

[25] Commission Communication: *Roadmap to a Resource Efficient Europe* (COM(2011)571 of 20.9.2011)

[26] Commission Memo: *Manifesto for a resource-efficient Europe* (MEMO/12/989 of 17.12.2012). Available on: http://europa.eu/rapid/press-release_MEMO-12-989_en.htm.

Concerning the competition for wood raw material from the bio-energy sector, a study recently carried out for the Commission[27] indicated that the total use of wood biomass in the EU for bio-energy will rise from 292 to 360 Mm³ (+ 68 Mm³ or + 23%) of roundwood equivalent (RWE) between 2010-16. But this would still leave a shortfall of 63 Mm³ vis-à-vis the wood requirements anticipated by EU MS in their National Renewable Energy Action Plans (NREAPs). Thus by 2016, the amount of roundwood equivalent used for bio-energy will be greater than that used for either the woodworking industries (332 Mm³) or for pulp and paper manufacture (347 Mm³). The huge increase foreseen will be drawn mainly from forest residues (+26 Mm³) but also significantly from roundwood[28] (+21 Mm³) and industrial residues (+17 Mm³) but very little from recovered wood (+4 Mm³), thus confirming the missed opportunity of the unused potential of the last category. (These totals however hide member-state variations, which are detailed in the national case studies of the overall study).

Starting upstream in the F-BI value chains, stakeholder proposals and inputs for improving forest inventory information on the supply of wood, and market information on demand for wood, wood-based materials and products, will be essential to increase market transparency and hence operational efficiency. As far as possible, such proposals could be reconciled into existing or programmed work by the EU institutions. Otherwise, if justified, feasible and affordable, new provisions might be considered.

An EU-wide catalogue of examples of good practice, especially amongst small and micro firms, on successful resource- and energy-efficient measures for wood-processing, could be a highly useful and desirable sectoral tool, for example in the form of a users' guidance manual. To this end, a joint public-private initiative could be launched in which, contingent upon industry identifying and sharing their good-practice examples as a basis, a study could catalogue the results and render them transferable. In any case, a set of life-cycle-based sustainability criteria could be developed for the uses of wood, based on a common set of criteria for sustainable forest management, and including efficiency requirements for greenhouse-gas saving, energy use and optimising the use of the cascade principle.

Within the framework of the next revision of the Waste Framework Directive (2014), the targets and measures for stimulating wood recovery and paper collection would be assessed at the EU level. Policy initiatives in the field of environment, renewable energy and climate action could further promote resource efficient use of biomass through e.g. recycling and cascading use. In this context, and also in that of the National Renewable Energy Action Plans (NREAPs), Member States and F-BI are encouraged to recover more wood, wood products and residues from industrial & post-consumer waste, for re-use and recycling. Member-State initiatives to help achieve this could include appropriate staff and consumer training, incentive schemes and fiscal penalties (e.g. modulating land-fill taxes applied to wood).

[27] Indufor Oy (2013). *Wood raw material Supply & Demand for the EU Wood-processing Industries.*

[28] UNECE-FAO JFSQ (Joint Forest Sector Questionnaire) definition

As a framework for such work, it is suggested that the private sector consider leading the formation of a European Wood Recovery Council (EWRC), to be established as a public-private partnership, for the purpose of improving wood recovery, re-use and recycling. Such an EWRC could for example, together with Member States, carry out monitoring of wood waste, including its disposal in land-fill and the land-fill taxes so engendered, and compile a comparative report each year.

All actors are urged – in any case - to contribute to developing good-practice guidelines for wood recovery, including the "cascade" principle, ideally in co-operation with a European Wood Recovery Council, as above. As appropriate, the Commission could help facilitate this process.

Given the positive experience in the EU printing sector with group energy purchase and also long-term, fixed-price contracts, including for the purchase and sale of energy, other F-BI sub-sectors could explore, together with the energy supply industries, the scope for similar arrangements. In this connection, industry is invited to collect, exchange and monitor statistics of F-BI energy prices across the EU, as a basis for analysing energy-price gaps between the EU and its competitors, especially with the USA.

**Raw materials, their sources and flows**

EU domestically harvested industrial wood (about 345 $Mm^3$[29]) accounts for about 90% of the wood processed by the EU F-BI. This is equivalent to only 45% of the annual EU wood growth, with up to another 17.5% going directly outside the F-BI as fuelwood. EU forests offer a bigger potential and could provide even more wood. However, supplies from Europe are constrained by:

- insufficient information on forest resources (species, qualities, dimensions) available for informed decision-making in the value chains;
- diminishing: quality, dimensions and accessibility of uncut wood;
- fragmented forest ownerships; part-time owners unmotivated to produce wood;
- the EU & MS regulatory frameworks (e.g. Natura 2000; biomass sustainability criteria - not all of which are imposed on other materials);
- costs of harvesting machinery and of roundwood, compounded by competition from subsidised non-EU buyers.

To help address these and other difficulties, forest-based sector stakeholders and Member States need sound sectoral knowledge bases and regulatory frameworks. In this context, it could be worthwhile to update, expand and widely disseminate the wood mobilisation guidance[30], so as to make it available to a broader range of sectoral stakeholders in a number

[29] This is the indicative average volume of wood harvested annually from EU forests (e.g. 2011: 345 $Mm^3$). However, because of partial cascade use, higher total volumes are processed by the EU F-BI.

[30] European Commission (DG Agriculture and Rural Development), UNECE/FAO and MCPFE (2010). *Good practice guidance on the sustainable mobilisation of wood in Europe*.

of EU languages, whilst linking it to the sets of downstream guidance on efficient wood processing and recovered wood (see above).

Furthermore, sustained dialogue between forest owners, civil society and the F-BI, based on their inter-dependency and to enhance their scope for co-operation could further help address the mismatch of the forest wood resource with market needs, as well as the worsening state of the EU's wood-harvesting capacity. In particular, the needs of micro and small wood-harvesting firms could be tackled through public and private-sector (national authorities, firms, chambers of commerce) support for adequate, updateable and transferable training modules (e.g. for machine operation & maintenance; health & safety; social inclusion) and the facilitation of finance for new entrants & re-equipping.

For **secondary raw materials**, much has already been achieved for paper. Its recycling rates reach around 70% on average for the EU, close to the economic optimum. There is still some scope for improvement e.g. by avoiding co-mingled waste collection, or by innovative sorting and treatment systems. For wood, the situation is different since recovery rates are generally very low, notably because of physical limitations (e.g. contamination) and logistical ones (dispersal; inadequate collection and sorting systems). So, much used wood remains uncollected or ends up in land-fill, triggering costs (e.g. non-reimbursable recovery charges and landfill taxes). Improving wood recovery rates, supported by the effective implementation of the Directives on the landfill of waste[31] and waste[32], would thus avoid penalties and provide valuable secondary raw material to the market (see above).

Globally, prices of non-EU wood supplies to the EU are increased by export taxes (Russia) and increasing domestic demand in exporting countries. The exports of sawlogs and paper for recycling, particularly towards Asian countries, such as China, are increasing, thus posing a risk for sustainable supply of this raw material at competitive prices to the EU industry. For the latter, the scope for possible action may result from the follow up of the feasibility study of applying a global certification scheme for recycling treatment facilities to the export of waste streams[33], which would build on environmentally-sound management criteria.

Similarly, monitoring the developments of recovered paper and roundwood exports, especially sawlogs, from the EU could be considered, with attention being paid to their consequences for the EU industry. In any case, amongst the issues which need to be taken into account regarding the trade in wood and wood-based raw materials are that they originate from sustainable forest management, that they are legally harvested and marketed, that they comply with phytosanitary requirements, such as de-barking, and are shipped in conditions not liable to give rise to the culture of harmful organisms.

[31] Council Directive of 26 April 1999 on the landfill of waste (1999/31/EC)

[32] Directive of the European Parliament and of the Council of 19 November 2008 on waste and repealing certain Directives (2008/98/EC)

[33] Risk & Policy Analysts (2012). *The feasibility of introducing a certification scheme/standard for recycling treatment facilities*. Study for DG Enterprise and Industry.

Bilateral trade agreements could be useful to facilitate access to non-EU primary wood supplies and to address import subsidies for and export taxes from non-EU partners and examine possible EU tariff reduction or elimination for imported secondary wood raw materials.

In view of the above and other challenges linked to raw materials supply, the Commission has launched the European Innovation Partnership (EIP) on Raw Materials[34]. An active involvement of all stakeholders concerned is crucial for the successful implementation of the Strategic Implementing Plan (SIP) and achieving the EIP goals.

**Other raw materials** include: resins, adhesives, coatings (woodworking); latex, starch (paper); textiles, metals, etc. (furniture); inks (printing). The costs of resins and coatings, although of a lower order than wood or energy, are nonetheless significant and not only generally increasing but also subject to volatility caused by supply-demand imbalances and/or currency fluctuations, since they often come from outside the EU.

In the face of cheaper product imports, increased raw material costs for the EU F-BI are difficult to recoup by increasing their product prices.

**Logistics (wood harvesting, infrastructures and transport)**

Economic wood harvesting requires sophisticated equipment and skilled operators. The high costs of equipment and operators are compounded by many forests being fragmented and having poor access. Outside the forest, infrastructures and transport systems pose constraints, such as restrictions in and variability between Member States for lorry dimensions and weight limits, as well as non-integrated transport systems.

With a view to overcoming some of these constraints, relevant EU and Member-State instruments, including the Rural Development Regulation[35], the European Regional Development Fund (ERDF)[36], the Strategic Framework for European Cooperation in Education and Training ("ET 2020")[37] – if the relevant operational programmes provide for it and where appropriate – can assist in the development of:

- forest infrastructures (tracks, roads, drains, bridges, loading bays, etc.);
- wood harvesters' training & skills – including for health and safety (H&S);
- improved communications (mobile phone networks, broadband internet access, etc.) for and co-operation between small and micro wood-harvesting firms to support logistics and health & safety in rural, especially remote, areas;

[34] Commission Communication: *Making raw materials available for Europe's future well-being: Proposal for a European Innovation Parnership on Raw Materials* (COM(2012)82 of 29.2.2012).

[35] Council Regulation of 21.10.2005 on support for rural development by the European Agricultural Fund for Rural Development (1698/2005).

[36] European Regional Development Fund. Available on: http://ec.europa.eu/regional_policy/thefunds/regional/index_en.cfm.

[37] Lifelong Learning Policy. Available on: http://ec.europa.eu/education/lifelong-learning-policy/policy-framework_en.htm.

– finance for wood-harvesting machinery through specialised financial engineering, in the form of e.g. lease-back, loan guarantees, group purchasing, etc.

In addition, the Commission and Member States could examine the scope for: facilitating the development of multi-modal transport systems; as well as the long-term harmonisation of transport legislation on the weight, axle weights & dimensions of lorries - with convergence towards higher capacity modules and vehicle combinations within the EU, and short & medium-term modulation of the same on appropriate routes.

Moreover, the Sulphur Directive[38] impact on fuel costs, especially for bunker fuel which is used in the ships transporting EU F-BI goods by sea and canal, needs to be further examined.

**Structural adaptation**

As can be seen from the summary in Table 3, above, SMEs and moreover micro enterprises are the norm throughout most of the F-BI, large firms being limited to the pulp and paper manufacturing industries and parts of the wood-based panel and sawnwood sub-sectors.

Individually, small EU firms cannot benefit from the economies of scale enjoyed by their larger rivals or the substantial subsidies provided to some overseas competitors by their governments. Thus, they typically suffer from relatively high unit costs. To compound this fact, they also face high costs for finance, both for raising capital investment and for operational liquidity. Nonetheless, companies of all sizes and in different parts of the value chains can benefit from networking, especially as sectoral or regional clusters. For example, firms specialising in the same product area could co-operate to reduce upstream supply costs, whilst sharing the benefits of bigger orders downstream.

Societal changes, such as shifting to digital media, combined with the economic and financial crisis, have negative impacts on the demand for certain F-BI products, creating structural over-capacities. Thus firms require significant restructuring and/or changes in the sectoral supply of products, with a corresponding adaptation in skills. To this end, the pioneering work done by the printing sector on socially responsible restructuring may be transferable to other sub-sectors. All the F-BI stakeholders are thus encouraged to continue to collect and disseminate data and other information as a basis for decision-making on company restructuring. In this context, the four F-BI sub-sectoral social dialogues may have a key role in facilitating this transformation.

The restructuring, especially for small and micro firms, can be facilitated also at the Member States' level, through for example: co-ordination (co-operatives, networking, clusters); implementation of the EU Small Business Act (SBA)[39] and other relevant SME schemes;

[38] Directive of the European Parliament and of the Council of 6 July 2005 amending Directive 1999/32/EC of 26 April 1999 relating to a reduction in the sulphur content of certain liquid fuels (2005/33/EC).

[39] Commission Communications: *"Think Small First" - A "Small Business Act" for Europe* (COM(2008)394 of 25.6.2008) and *Review of the "Small Business Act" for Europe* (COM(2011)78 of 23.2.2011).

promotion of and training on how to use the European Social Fund (ESF)[40] and European Globalisation Adjustment Fund (EGF)[41], including for retraining & re-skilling of employees in industries undergoing severe structural adaptation; and providing an access to finance at competitive rates.

**Innovation & RTD**

The EU is a high-cost producer of wood-based and related products. So, in addition to providing technological advances, RTD and innovation are needed for resource- and energy-efficient processes and new innovative products, which will contribute to reducing production cost and increase added value.

Beyond incremental improvements, breakthrough technologies, together with new cross-sectorial business models are needed for the F-BI's transition to Europe 2050, supporting more added value and jobs. "Bio-based" products, as outlined in Horizon 2020[42], offer important scope for this within the fourth F-BI value chain.

The Forest-based Sector Technology Platform (FTP) is a key independent instrument for co-ordinating sectoral RTD and innovation strategy, such as the Strategic Research Agenda (SRA) and its 2030 Vision, and participation in EU frameworks like Horizon 2020 & COSME[43]. European Innovation Partnerships (EIPs) and SPIRE[44] also offer potential. Even so, access to projects still remains difficult for small and micro firms, for which development is often expensive, e.g. re-tooling costs, and it also represents a high risk.

In addition to the EU Programmes - COSME and Horizon 2020, Member States and the F-BI may identify and develop means, for small and micro firms to participate in RTD & innovation (including design) and facilitate their access to R&D funding. In appropriate cases, they could then catalogue and spread such good practices, also sharing them at EU level, including with linguistic translations. In this context, the Commission may have a co-ordinating role to play.

Furthermore, the European Structural and Investment Funds (in particular the ERDF, the European Agricultural Fund for Rural Development (EAFRD) and the ESF) may be invested into research and innovation in the area of forestry, wood-based and related products, provided such investments form part of the relevant national or regional smart specialisation strategies.

[40] European Social Fund. Available on: http://ec.europa.eu/esf/home.jsp.

[41] European Globalisation Adjustment Fund. Available on: http://ec.europa.eu/social/main.jsp?catId=326&langId=en.

[42] Commission Communication: *Horizon 2020 - The Framework Programme for Research and Innovation* (COM(2011)808 of 30.11.2011).

[43] Programme for the Competitiveness of Enterprises and SMEs (COSME) 2014-2020. Available on: http://ec.europa.eu/cip/cosme.

[44] Sustainable Process Industry through Resource and Energy Efficiency. Available on: www.spire2030.eu.

**Education, training and skills, including shortages; ageing workforce**

Needs for education, training and skills, including to maintain high labour productivity, span all F-BI sub-sectors, but their lack is starkest in small and micro firms in: wood harvesting, woodworking, furniture and printing. New F-BI entrants need not only qualifications but must also gain sectoral knowledge, such as artisanal crafts, from experienced staff. Combined with their own experience, these build their skills. All staff also need life-long learning to enhance skills, improve productivity and supply new markets.

Ageing workforces persist across all the F-BI, often partly because of a negative sectoral image and modest pay deterring young entrants, who may be more attracted to other, more tempting careers. Decent work, fair pay and working practices, flexible to evolving technical and social needs, are essential to attract and retain staff. Moreover, shrinking workforce due to an ageing population in the EU and urbanisation also concern forest owners and thus negatively impact on the wood mobilisation. With regard to the latter, the ageing and urbanisation of forest owners raises the need for them to have access to relevant education, training and skills development. This issue is addressed in the new EU Forest Strategy: for forests and the forest-based sector, which this Blueprint accompanies.

In this context, it would be worthwhile for employers and trade unions, vocational and educational institutes and other bodies involved in education and training systems and other stakeholders, as appropriate, to work together, especially within the relevant EU Sectoral Social Dialogue Committees and European Skills Alliances, to identify needs and provisions for education, training and skills development throughout the F-BI and wood harvesting. The scope could include: mapping of F-BI & related sub-sectors, so as to match tasks with qualifications; development and use of training courses and skills standards; exchange programmes between students and professionals; skills transfer between experienced craftsmen and new entrants; development of work-based learning and apprenticeship systems (within the European Alliance for Apprenticeships); life-long learning (LLL) to adapt to new technology and markets, and adapting work patterns to evolving societal needs.

In addition, the deployment of new and advanced technologies in the F-BI sectors could lead to the generation of new knowledge intensive and high-tech jobs, which could be appealing to the new generations and help to rejuvenate the sector workforce.

With a view to adapting knowledge and skills, the F-BI stakeholders may engage in a network of Research, Education and Training Centres on sustainable raw materials management. There could be scope to include such an initiative into the Knowledge and Innovation Community (KIC)[45] on Raw Materials.

Specific elements that cannot be addressed through existing EU or national programmes, could be further explored by the Commission, together with the above actors, to find solutions.

[45] European Institute of Innovation & Technology. Available on: http://eit.europa.eu.

**Coherence of EU legislation and costs arising**

Real or potential inconsistencies within and between both EU and Member State policies affecting the sector, may have unintended consequences with related administrative burden and costs.

In this context, a cumulative cost assessment of the EU legislation affecting the EU F-BI value chains might provide a valuable feed-back for future policy making, including "smart regulation"[46]. The results could contribute to a wider analysis of impacts, including costs, benefits, and coherence, of policies and legislation.

Furthermore, as part of a review foreseen for 2015 of the functioning and effectiveness of EU "Timber Regulation" (EU TR)[47] in preventing illegal wood and wood-based products from being placed on the EU market, the Commission will look at the administrative consequences of the Regulation, in particular for small and medium-sized firms. The impacts on micro enterprises could also be considered, ideally hand-in-hand with overall cost-efficiency. As regards the product coverage outlined in its annex, this will also be reviewed and, if appropriate, be revised via delegated acts. Specific consideration will be given to Ch. 49 (Printed goods) of the EU Combined Nomenclature, taking into account the competitiveness of the sectors concerned.

Means may also be examined to improve the coherence, efficiency, cost-effectiveness and traceability of providing and accessing technical information (e.g. phytosanitary; legality & sustainability; standards; product safety, etc.) required to place wood and wood-based goods on the EU and other markets, as well as in procurement processes, labelling schemes and other contexts.

In this context, it would be also important to avoid having different sustainability criteria for different wood assortments, depending on respective end uses.

**Implementation of EU climate policy, including beyond 2020**

The climate change mitigation potential and contribution of the F-BI is explicit in the carbon-accounting rules for land use, land-use change and forestry (LULUCF)[48]. The international rules for reporting and accounting of the so-called harvested wood products (HWP), e.g. sawnwood, panels and paper, were developed at the 2011 Durban climate conference and now allows for recognition of the storage of carbon in wood products. The EU rules for applying for the Greenhouse Gas reporting and accounting of Member States (and other parties to the Kyoto Protocol) but not the individual enterprises.

[46] Commission Communication: *Smart Regulation in the European Union* (COM(2010)543 of 8.10.2010).

[47] Regulation 995/2010.

[48] Proposal for a Decision of the European Parliament and of the Council on accounting rules and action plans on greenhouse gas emissions and removals resulting from activities related to land use, land use change and forestry (COM(2012)93 of 12.3.2012).

Production and energy emissions of energy-intensive F-BI sub-sectors, specifically of wood-based panels and pulp & paper, are subject to the Emissions Trading System (ETS)[49]. These are on the list of sectors liable to "carbon leakage"[50] (relocation outside the EU due to high carbon price), being revised for 2014. It is important that the revision of the list is performed in an open and transparent manner, in accordance with the requirements of the ETS Directive, taking fully into account the specific features of industries and preserving the competitiveness of the industries, including energy costs.

**International competition, trade and co-operation**

The EU F-BI provide high-quality goods and services to high technical, social and environmental standards. Global competitors, availing of similar technology levels but not subject to the same discipline, produce and export at lower costs. Moreover, they often benefit from production and/or export subsidies from their governments, and in some cases abuse EU intellectual property rights (IPR), e.g. for designs, whilst corresponding EU exports often face tariff barriers on other markets.

In this context, trade agreements and relevant trade-defence instruments are essential tools for addressing these challenges, in order to provide a more level global playing field. Nevertheless, the differences in the countries' competitive advantage will remain. In addition, the Commission could continue to pursue sectoral dialogues with major F-BI trading partners such as Russia, Canada and Japan on wood-based and related products. It may also convene meetings at appropriate levels, on sectorally relevant issues (e.g. competitiveness, market access, standards, FLEGT) in the form of a public-private sector round table, including when necessary with the F-BI of key partner countries.

**Information, communications and image**

Information of all kinds (data, legislation, etc.) is the life-blood of the F-BI, flowing within and between sub-sectors and beyond. One resultant of this information is the set of sectoral images perceived by the F-BI itself, EU and Member State institutions and the public. Accordingly, improved information and its better communication within, to and from the EU F-BI, would improve the efficiency of sectoral functioning and hence contribute to cost reduction.

In this context, the industry's "Two Sides" initiative, which aims to promote the responsible production and use of print and paper and to dispel erroneous technological or environmental misconceptions pertaining to them, is helpful.

[49] Directive of the European Parliament and of the Council of 13 October 2003 establishing a scheme for greenhouse gas emission allowance trading within the Community (2003/87/EC).

[50] Commission Decision of 24 December 2009 determining, pursuant to Directive 2003/87/EC of the European Parliament and of the Council, a list of sectors and subsectors which are deemed to be exposed to a significant risk of carbon leakage (2010/2/EU).

It is therefore essential that all stakeholders and other interested parties substantiate their statements and commitments, for example regarding the technological and/or environmental performance of the use of electronic media versus paper-based media. Distinguishing between these two formats could be by means of adequate *a priori* impact assessments based on life-cycle analyses (LCA). To this end, comparative LCAs by F-BI stakeholders on the technological advantages and environmental impacts of digital and paper media could be valuable.

More widely, the F-BI stakeholders could also engage in raising their awareness of sub-sectoral issues having impacts along their overall value chains.

With an aim of increasing sectoral awareness, knowledge and visibility among EU and Member State bodies and the public, the F-BI are encouraged to carry out information campaigns, including on-site visits. Such actions could ideally include: presenting the F-BI to young people, e.g. school visits; providing knowledge exchanges between the Commission and Member States' services and the F-BI on each other's activities; increasing public interest in and knowledge of the legal and sustainable sourcing of wood, wooden materials and wood-based products, together with their other sustainable aspects, all on an LCA basis, including for making informed consumer choices.

Member States and F-BI stakeholders, in addition to existing and planned actions, may also identify and develop events for sectoral visibility and help improve the sectoral image, such as initiatives rewarding innovation in the sector, a European Annual F-BI Communication Day - with site visits to F-BI plants throughout the EU, annual joint F-BI sectoral events (including EU institutions et al.), annual college & university days for prospective F-BI students.

## VI. Conclusions

Given the above steps needed to make this transition and the accompanying need for sectoral restructuring to achieve it, a radical change in mind-set is also needed amongst all the F-BI's stakeholders (employers, trades unions, public authorities, academia, customers, etc.) and other interested parties. This is especially vital in industries dominated by SMES and micro firms, many of which are family-owned businesses.

The Commission's role will be to inspire, co-ordinate and facilitate sectoral involvement to carry out these activities and will be assisted by the Advisory Committee on Community Policy regarding Forestry & Forest-based Industries and its working groups, one of which has already assisted during 2012 in helping to identify the challenges and activities developed here. To assist in overseeing the implementation of this Blueprint, the updated AC F-BI, the EU Expert Group on Forest-based & Related Industries, could set up a working group and hold a minimum of a meeting every year to monitor and assess sectoral progress and report to the Commission. Where appropriate, the implementation will be in cooperation with the Standing Forestry Committee and with the Advisory Group on Forestry and Cork. AC F-BI will remain platform for issues related to industrial value chains.

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# COMMUNICATION DE LA COMMISSION AU PARLEMENT EUROPÉEN, AU CONSEIL, AU COMITÉ ÉCONOMIQUE ET SOCIAL EUROPÉEN ET AU COMITÉ DES RÉGIONS

## Une nouvelle stratégie de l'UE pour les forêts et le secteur forestier

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**COMMUNICATION DE LA COMMISSION AU PARLEMENT EUROPÉEN, AU CONSEIL, AU COMITÉ ÉCONOMIQUE ET SOCIAL EUROPÉEN ET AU COMITÉ DES RÉGIONS**

**Une nouvelle stratégie de l'UE pour les forêts et le secteur forestier**

## 1 L'EUROPE A BESOIN DE SES FORETS

Les forêts et autres surfaces boisées couvrent plus de 40 % du territoire de l'UE et présentent des caractéristiques très diverses d'une région à l'autre. La superficie forestière de l'UE a augmenté de près de 0,4 % par an au cours des dernières décennies grâce au reboisement et à la succession naturelle. Au niveau mondial, toutefois, la surface forestière continue de diminuer. Aujourd'hui, dans l'Union européenne, on n'abat qu'entre 60 et 70 % de l'accroissement annuel, de sorte que le volume de bois sur pied est en augmentation. Cependant, selon les projections faites par les États membres dans le cadre de l'utilisation des terres, du changement d'affectation des terres et de la foresterie (UTCATF), les taux d'exploitation devraient augmenter d'environ 30 % d'ici à 2020 par rapport à 2010[1]. Environ 60 % des forêts appartiennent à plusieurs millions de propriétaires privés[2], pourcentage qui devrait augmenter, étant donné que, dans certains États membres, la restitution de la propriété forestière se poursuit. Le reste appartient à l'État et à d'autres propriétaires du secteur public.

Les forêts sont multifonctionnelles: elles remplissent des fonctions économiques, sociales et environnementales. Elles offrent un habitat pour les animaux et les plantes et jouent un rôle majeur dans l'atténuation du changement climatique et dans la fourniture d'autres services environnementaux. Près d'un quart de la superficie forestière de l'UE est protégée dans le cadre de Natura 2000, et une grande partie du reste abrite des espèces protégées par la législation de l'UE en matière de protection de la nature. Les avantages que les forêts présentent pour la société, notamment en ce qui concerne la santé humaine, les loisirs et le tourisme, sont également considérables[3].

Bien que la dimension socio-économique des forêts soit importante, elle est souvent sous-estimée. Les forêts contribuent au développement rural et représentent près de trois millions d'emplois. Le bois reste la principale source des revenus financiers provenant des forêts. Par conséquent, la stratégie concerne également la filière bois de l'UE, qui est soumise à la politique industrielle de l'UE. Le bois est également considéré comme une source importante de matières premières pour les bio-industries émergentes.

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1 Sur la base des projections de l'UE relatives aux niveaux de référence applicables à la gestion forestière qui ont été présentées à la CCNUCC CMP.6.

2 16 millions selon les estimations des propriétaires. Bien que le nombre de propriétaires forestiers privés soit relativement élevé, la part des terrains forestiers qu'ils représentent est comparativement petite et souvent fragmentée.

3 De plus amples précisions sont fournies dans le livre vert concernant la protection des forêts et l'information sur les forêts [COM(2010) 66].

La biomasse forestière est actuellement la principale source d'énergie renouvelable et représente maintenant environ la moitié de la consommation totale d'énergies renouvelables de l'UE. Selon les plans d'action nationaux en matière d'énergies renouvelables, la biomasse utilisée à des fins de chauffage, de refroidissement et d'électricité contribuerait à hauteur de 42 % environ à l'objectif consistant à porter à 20 % la part des énergies renouvelables pour 2020. Si cet objectif est atteint, la quantité de bois utilisée à des fins énergétiques dans l'UE équivaudrait au volume total de bois récolté aujourd'hui. Les forêts fournissent également une large gamme d'autres produits, tels que le liège, les résines, les champignons, les fruits à coque, le gibier et les baies.

Il est indispensable d'assurer une gestion durable des forêts si nous voulons que ces avantages soient fournis de manière équilibrée.

> On entend par gestion durable des forêts l'utilisation des forêts et des terrains boisés d'une manière et à une intensité telles qu'elles maintiennent leur diversité biologique, leur productivité, leur capacité de régénération, leur vitalité et leur capacité à satisfaire, actuellement et dans le futur, les fonctions écologiques, économiques et sociales pertinentes, aux niveaux local, national et mondial, sans causer de préjudice à d'autres écosystèmes[4].

Bien que le traité sur le fonctionnement de l'Union européenne ne fasse aucune référence à des dispositions spécifiques pour une politique forestière de l'UE, l'UE contribue depuis bien longtemps, grâce à ses politiques, à la mise en œuvre d'une gestion durable des forêts et aux décisions des États membres ayant trait aux forêts. Parmi les mesures marquantes figurent notamment la stratégie Europe 2020 pour la croissance et l'emploi, la feuille de route pour une utilisation efficace des ressources, la politique de développement rural, la politique industrielle, le paquet «Climat et énergie» de l'UE avec ses objectifs pour 2020, la stratégie relative à la santé des végétaux et au matériel de reproduction des végétaux et les stratégies en faveur de la biodiversité et de la bioéconomie[5].

Sur la base de la subsidiarité et de la responsabilité partagée, la stratégie forestière de 1998 pour l'Union européenne[6] a établi un cadre d'action en faveur de la gestion durable des forêts qui repose sur des liens de coopération mutuellement bénéfiques entre les politiques et initiatives de l'UE et des États membres. Le plan d'action 2007-2011 en faveur des forêts[7] a été un instrument important pour la mise en œuvre de la stratégie. Il était axé sur quatre objectifs: compétitivité, environnement, qualité de vie, et coordination et communication. Le cofinancement de mesures forestières au titre du règlement sur le développement rural est et restera le principal mode de financement au niveau de l'UE.

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4 Conférence ministérielle sur la protection des forêts en Europe, Helsinki, 1993.
5 COM(2011) 244 et COM(2012) 60.
6 Résolution du Conseil du 15 décembre 1998 relative à une stratégie forestière pour l'Union européenne.
7 COM(2006) 302.

Une évaluation ex post du plan d'action en faveur des forêts a souligné la nécessité d'élaborer une nouvelle stratégie forestière qui: développe et mette en œuvre une vision commune de la gestion multifonctionnelle et durable des forêts en Europe; définisse des priorités d'action et des objectifs; établisse des liens entre les stratégies et plans de financement de l'UE et des États membres; renforce la cohérence au niveau de la planification, du financement et de la mise en œuvre des activités transsectorielles; mette en place des mécanismes clairs pour le suivi, l'évaluation et l'établissement de rapports; et réexamine les modalités de participation des parties intéressées. La présente communication soutient ces recommandations en fournissant des orientations stratégiques.

## 2 POURQUOI UN NOUVEAU CADRE EST-IL NECESSAIRE?

Au cours des 15 dernières années, des changements sociétaux et politiques notables ont influé sur la manière dont la société de l'UE considère les forêts et la sylviculture. D'une manière générale, les forêts sont soumises à des pressions et à des menaces croissantes. Dans le même temps, la multiplication des politiques en rapport avec les forêts crée un environnement complexe et fragmenté. Le renforcement des liens entre les marchés internationaux des denrées alimentaires, des aliments pour animaux, des fibres et des combustibles et carburants entraîne lui aussi des perturbations imprévues du marché.

Un nouveau cadre est nécessaire pour:

- faire en sorte que le potentiel multifonctionnel des forêts de l'UE soit géré d'une manière durable et équilibrée, permettant aux services écosystémiques essentiels de nos forêts de fonctionner correctement;
- répondre à la demande croissante de matières premières pour les produits existants et nouveaux (produits chimiques ou fibres textiles verts, par exemple) et d'énergies renouvelables. Cette demande donne certes l'occasion de diversifier les marchés, mais elle représente un défi de taille pour la gestion durable et le maintien de l'équilibre entre les différentes demandes. La demande de nouvelles utilisations dans les secteurs de la bioéconomie et de la bioénergie devrait être coordonnée avec les demandes traditionnelles, dans le respect des contraintes imposées par l'exigence de durabilité;
- relever les défis auxquels la filière bois est confrontée en matière d'efficacité dans l'utilisation des ressources et d'efficacité énergétique, de matières premières, de logistique, d'adaptation structurelle, d'innovation, d'éducation, de formation et de compétences, de concurrence internationale, de politique climatique au-delà de 2020 et d'information et de communication, et tirer parti des possibilités dans ces domaines, afin de stimuler la croissance;
- protéger les forêts et la biodiversité des effets notables des tempêtes et des incendies, de la pénurie croissante des ressources hydriques et des ravageurs. Ces menaces ne

sont pas limitées aux frontières nationales et sont aggravées par le changement climatique;

- reconnaître que l'UE ne dépend pas seulement de sa propre production et que sa consommation a des répercussions sur les forêts du monde entier;
- établir un système d'information approprié pour assurer le suivi de tous les objectifs susmentionnés.

L'UE a besoin d'un cadre politique qui coordonne les politiques en rapport avec les forêts et en assure la cohérence, et qui permette des synergies avec d'autres secteurs ayant une incidence sur la gestion des forêts. Elle a besoin d'une nouvelle stratégie pour les forêts, qui soit un élément de référence clé dans l'élaboration des politiques en rapport avec les forêts. Il faut accorder aux forêts et au secteur forestier de l'UE une place leur permettant de contribuer aux objectifs de l'UE.

## 3 LA VOIE A SUIVRE : UNE NOUVELLE STRATEGIE DE L'UE POUR LES FORETS ET LE SECTEUR FORESTIER

La présente proposition préconise une vision globale et cohérente de la gestion des forêts, aborde la question des avantages multiples offerts par les forêts, intègre les aspects internes et externes de la politique forestière et appréhende la chaîne de valeur forestière dans son ensemble.

Elle identifie les principes fondamentaux nécessaires pour renforcer la gestion durable des forêts et pour améliorer la compétitivité et la création d'emplois, en particulier dans les zones rurales, tout en assurant la protection des forêts et la fourniture de services écosystémiques. Elle précise également comment l'UE souhaite mettre en œuvre les politiques en rapport avec les forêts.

Pour que cette stratégie ait un impact sur les politiques dont la compatibilité avec la gestion durable des forêts doit ou pourrait devoir être démontrée et qu'elle puisse atteindre ses objectifs, il est nécessaire d'établir, en matière de gestion durable des forêts, des critères objectifs, ambitieux et démontrables pouvant être appliqués à toutes les utilisations de la biomasse forestière. La stratégie et sa mise en œuvre devraient se fonder sur la législation et les initiatives internationales existantes, notamment sur les travaux effectués dans le cadre de FOREST EUROPE[8] et tenir compte de la situation particulière des petits propriétaires forestiers et du recours à des instruments du secteur privé fondés sur le marché tels que la certification.

[8] Processus politique paneuropéen pour la gestion durable des forêts du continent.

Pour atteindre les objectifs communs et améliorer la cohérence et les synergies, il est important d'instaurer une coordination avec et entre les États membres. Les États membres sont invités à tenir compte des principes et des objectifs de cette stratégie lors de l'élaboration et de la mise en œuvre de leurs plans d'action et de leurs programmes forestiers nationaux. Il est indispensable de développer les possibilités de mise en réseau et les mécanismes d'échange d'informations et de bonnes pratiques.

### 3.1 Principes directeurs

- la gestion durable des forêts et leur rôle multifonctionnel, permettant d'offrir une multiplicité de biens et de services de manière équilibrée et de garantir la protection des forêts,
- l'utilisation efficace des ressources, l'optimisation de la contribution des forêts et du secteur forestier au développement rural, à la croissance et à la création d'emplois,
- la responsabilité à l'égard des forêts au niveau mondial, la promotion de la production et de la consommation durables de produits forestiers.

L'Europe a acquis une longue tradition dans la gestion durable des forêts, qui se reflète dans les principes de FOREST EUROPE appliqués par les politiques des États membres et soutenus par l'UE, en particulier dans le cadre de la politique de développement rural. Il s'agit d'un concept dynamique présentant des dimensions internationales, régionales et locales qui doit être mis en œuvre par les gestionnaires de forêts sur le terrain.

Dans le cadre du processus FOREST EUROPE, les États membres se sont engagés à gérer leurs forêts de manière durable, conformément à leur législation et à leurs politiques forestières nationales. Lors de l'application de cette stratégie, ils doivent tenir compte des principes fondamentaux de la gestion durable des forêts, améliorer l'échange d'informations et diffuser les bonnes pratiques.

Dans le secteur forestier, l'utilisation efficace des ressources consiste à exploiter les ressources forestières de manière à limiter le plus possible les incidences sur l'environnement et le climat, et à donner la priorité aux produits forestiers qui ont une valeur ajoutée plus élevée, créent davantage d'emplois et contribuent à un meilleur bilan carbone. L'utilisation «en cascade» du bois[9] remplit ces critères. Dans certains cas, des approches différentes peuvent être nécessaires, par exemple lorsque des changements interviennent dans la demande ou pour garantir la protection de l'environnement.

[9] Selon le principe de cascade, le bois est utilisé dans l'ordre de priorité suivant: produits à base de bois, prolongement de leur durée de vie, réutilisation, recyclage, bioénergie et élimination.

## 3.2 Objectifs pour 2020 en ce qui concerne les forêts

Faire en sorte que toutes les forêts de l'UE soient gérées selon les principes de la gestion durable et que la contribution de l'UE à la promotion de la gestion durable des forêts et à la réduction de la déforestation au niveau mondial soit renforcée, et en apporter la preuve. Cela permettra:

- de contribuer à trouver un équilibre entre les différentes fonctions que remplissent les forêts, de répondre aux demandes et de fournir des services écosystémiques essentiels;

- de fournir une base pour que la sylviculture et l'ensemble de la chaîne de valeur forestière contribuent de manière compétitive et viable à la bioéconomie.

Les objectifs définis en collaboration avec les autorités des États membres et les parties intéressées abordent de manière intégrée les trois dimensions du développement durable, offrant ainsi une approche globale de la gestion des forêts et des politiques dans ce domaine.

## 3.3 Huit domaines prioritaires interconnectés: une valeur ajoutée pour tous

***La gestion durable des forêts contribue aux objectifs sociétaux majeurs***

### *3.3.1 Promouvoir nos communautés rurales et urbaines*

La société a de plus en plus besoin des forêts. Elles couvrent une grande partie des zones rurales et jouent également un rôle essentiel pour la population rurale car elles soutiennent le bien-être économique et l'emploi.

Une main-d'œuvre pérenne, formée et sûre constitue l'un des piliers d'un secteur forestier plus compétitif. Des forêts gérées efficacement et des gestionnaires, des travailleurs et des entrepreneurs forestiers qualifiés favorisent la viabilité et la compétitivité du secteur forestier qui joue un rôle important dans le développement rural et dans l'ensemble de l'économie tout en offrant des avantages pour la société.

La Commission estime que les fonds de développement rural devraient être utilisés pour soutenir la mise en œuvre de la gestion durable des forêts. Les États membres devraient tirer parti des possibilités que présente le nouveau règlement sur le développement rural et donner la priorité aux investissements dans les domaines suivants: la modernisation des techniques forestières; l'optimisation de la contribution du secteur à la bioéconomie; l'amélioration de la résilience, de la valeur environnementale et du potentiel d'atténuation des écosystèmes forestiers; la réalisation des objectifs en matière de nature et de biodiversité; l'adaptation au changement climatique; la conservation des ressources génétiques; la protection des forêts et

l'information et la création de nouvelles zones boisées et de nouveaux systèmes agroforestiers.

Orientations stratégiques:

- Les États membres devraient utiliser les fonds de développement rural pour renforcer la compétitivité, favoriser la diversification de l'activité économique, améliorer la qualité de la vie et fournir des biens publics environnementaux spécifiques[10] afin de contribuer à promouvoir les fonctions sociales de la gestion durable des forêts.

- La Commission et les États membres devraient évaluer les effets des mesures forestières mises en œuvre au titre de la politique de développement rural et améliorer leur efficacité.

- Dans le cadre de l'objectif de simplification des mesures visant à moderniser les règles applicables aux aides d'État, la Commission propose d'envisager d'inclure les grandes entreprises dans le système d'exemption par catégories et a entrepris de réviser les conditions applicables aux exemptions par catégorie dans le secteur forestier[11].

- Avec l'aide du financement du développement rural, les États membres sont encouragés à soutenir la création de systèmes de conseil forestier pour mener des actions de sensibilisation ainsi que la formation et la communication entre les sylviculteurs locaux et les autorités.

- La Commission et les États membres devraient mieux apprécier la valeur des avantages que présentent les forêts pour la société et, grâce à la gestion durable des forêts, trouver le juste équilibre dans la fourniture des différents biens et services.

### *3.3.2 Stimuler la compétitivité et la durabilité de la filière bois de l'UE, de la bioénergie et de l'économie verte dans son ensemble*

Le bois est une matière première naturelle, renouvelable, réutilisable et recyclable. S'il provient de forêts exploitées de manière durable et s'il est transformé et utilisé de manière à réduire autant que possible les effets négatifs sur le climat et l'environnement tout en constituant un moyen de subsistance, il peut remplir une fonction durable.

Au total, 58 % de la biomasse ligneuse récoltée dans l'UE est transformée par la filière bois de l'UE[12], qui représente environ 7 % du PIB de l'industrie manufacturière de l'UE et près de 3,5 millions d'emplois et contribue à la réalisation des objectifs de la politique industrielle de l'UE[13]. Toutefois, la compétitivité future de ce secteur passe par de nouveaux procédés et produits qui devront être efficaces dans l'utilisation des ressources et de l'énergie et respectueux de l'environnement. Les matériaux et les produits chimiques de pointe à base de bois devraient jouer un rôle prépondérant dans la bioéconomie de l'UE. Un document de

10 Conclusions du Conseil européen des 7 et 8 février 2013 sur le cadre financier pluriannuel.

11 Étant donné que le secteur forestier ne relève pas de l'annexe I ni de l'article 42 du traité sur le fonctionnement de l'Union européenne, toutes les règles de concurrence s'appliquent pleinement à ce secteur.

12 Travail du bois, fabrication de meubles, fabrication et transformation de pâte à papier et de papier, imprimerie (NACE, divisions 16, 31, 17, 18.1). Les aspects pertinents de l'exploitation forestière (NACE, groupe 02.2) sont également couverts.

13 «Une industrie européenne plus forte au service de la croissance et de la relance économique» [COM(2012) 582 final] et «Une politique industrielle intégrée à l'ère de la mondialisation» [COM(2010) 614].

travail des services de la Commission décrit les sous-secteurs de la filière bois de l'UE, leurs perspectives économiques et technologiques, et recense les principaux défis qu'ils doivent relever et les actions correctives (2013-2020) qui peuvent contribuer à améliorer leur compétitivité à l'échelle mondiale.

Les 42 % restants sont utilisés à des fins énergétiques et représentent environ 5 % de la consommation énergétique totale de l'UE. D'après les plans d'action nationaux en matière d'énergies renouvelables, la biomasse restera la principale source d'énergie renouvelable en 2020. La Commission examine actuellement si des mesures supplémentaires, notamment des critères harmonisés de durabilité, devraient être proposées pour résoudre les problèmes de viabilité écologique liés à l'utilisation de la biomasse solide et gazeuse à des fins de chauffage, de refroidissement et d'électricité.

Par conséquent, la biomasse forestière et les produits forestiers non ligneux, qui gagnent du terrain sur le marché, offrent des opportunités en ce qui concerne le maintien ou la création d'emplois et la diversification des revenus dans une économie verte, à faibles émissions de $CO_2$.

Orientations stratégiques:

En collaboration avec les États membres et les parties intéressées, la Commission:

- étudiera et encouragera une utilisation plus large du bois en tant que matière première durable, renouvelable et respectueuse du climat et de l'environnement, sans que ne soient occasionnés des dégâts aux forêts et à leurs services écosystémiques; évaluera si le remplacement des matériaux et de l'énergie par la biomasse forestière et les produits forestiers récoltés peut être bénéfique pour le climat et analysera si les incitations à utiliser la biomasse forestière créent des distorsions du marché;

- élaborera, d'ici la fin de l'année 2014, au niveau de l'UE, des critères de gestion durable des forêts qui soient objectifs, ambitieux et démontrables pouvant être appliqués dans différents contextes indépendamment de l'utilisation finale de la biomasse forestière. La Commission présentera des mesures appropriées;

- évaluera l'approvisionnement potentiel en bois et facilitera l'exploitation durable du bois; élaborera à cet égard et en ce qui concerne le principe de «cascade», ainsi qu'en matière de procédés de fabrication efficaces dans l'utilisation des ressources et de l'énergie, un guide de bonnes pratiques s'adressant particulièrement à la filière bois, aux PME et aux micro-entreprises;

- stimulera la croissance et l'internationalisation du marché des produits de la filière bois de l'UE et améliorera les connaissances sectorielles, notamment en matière de construction durable et de diffusion d'informations aux consommateurs sur la fabrication de meubles;

- facilitera l'accès des produits et des matières premières de la filière bois de l'UE aux marchés des pays tiers au moyen d'accords commerciaux bilatéraux et en améliorant l'information sur les conditions d'importation et sur les exportations de matières premières;

- soutiendra la plateforme technologique pour la filière bois et encouragera de nouvelles initiatives, telles que les partenariats public-privé (dans le secteur des produits d'origine biologique, par exemple), qui favorisent la recherche et l'innovation en ce qui concerne divers produits et procédés efficaces dans l'utilisation des ressources et de l'énergie;

- lancera en 2014 une évaluation des coûts cumulés de la législation de l'UE ayant une incidence sur les chaînes de valeur de la filière bois. Les résultats pourraient permettre de réaliser une analyse plus détaillée des incidences (y compris des coûts), des avantages et de la cohérence des politiques et de la législation.

### *3.3.3 Les forêts face au changement climatique*

Les forêts sont vulnérables face au changement climatique. Il est donc important de maintenir et de renforcer leur résilience et leur capacité d'adaptation, notamment grâce à la prévention des incendies et à d'autres solutions en matière d'adaptation (espèces et variétés végétales appropriées, etc.).

Par ailleurs, la gestion des forêts peut atténuer le changement climatique si l'on maintient ou l'on intensifie le rôle de puits que jouent les forêts dans le cycle du carbone et dans la mesure où elles fournissent des biomatériaux qui peuvent emmagasiner temporairement le carbone ou servir de produits de substitution au carbone en remplaçant les matériaux et les combustibles et carburants riches en carbone. L'UE a récemment adopté des règles de comptabilisation, de surveillance et de déclaration en ce qui concerne les activités UTCATF[14], en vertu desquelles les États membres fourniront par exemple des informations sur leurs plans pour améliorer la fonction de puits et réduire les émissions liées aux forêts. L'UE et les États membres ont également contracté des engagements relatifs au secteur UTCATF dont ils doivent s'acquitter d'ici à 2020, autrement dit durant la deuxième période d'engagement au titre du protocole de Kyoto.

Les forêts atténuent également les incidences des phénomènes météorologiques extrêmes du fait qu'elles modèrent les températures et réduisent la vitesse du vent et le ruissellement des eaux.

Orientations stratégiques:

Les États membres devraient démontrer:

- comment ils envisagent d'augmenter le potentiel d'atténuation de leurs forêts grâce à des mesures d'amélioration de l'absorption et de réduction des émissions (notamment l'utilisation en cascade du bois) en tenant compte du fait que le nouveau sous-programme LIFE+ pour l'action pour le climat et le financement au titre du développement rural peuvent promouvoir et soutenir les pratiques existantes ou nouvelles de gestion des forêts qui limitent les émissions ou augmentent la productivité biologique nette (c'est-à-dire l'absorption de $CO_2$).

[14] Décision n° 529/2013/UE.

Les États membres devraient réaliser cet objectif d'ici à la mi-2014, dans le cadre des informations qu'ils fournissent concernant les actions UTCATF;

- comment ils renforcent la capacité d'adaptation et la résilience de leurs forêts, en se fondant sur les actions proposées dans la stratégie de l'UE relative à l'adaptation au changement climatique[15] et le livre vert concernant la protection des forêts et l'information sur les forêts, et notamment combler les lacunes en matière de connaissances et intégrer les mesures d'adaptation dans les politiques forestières.

### *3.3.4 Protection des forêts et amélioration des services écosystémiques*

Les forêts fournissent des services écosystémiques dont dépendent les communautés rurales et urbaines et abritent une grande biodiversité. En raison des pressions exercées sur les forêts (telles que la fragmentation de l'habitat, la propagation d'espèces allogènes envahissantes, le changement climatique, la pénurie d'eau, les incendies, les tempêtes et les ravageurs), il est nécessaire de renforcer la protection. Les règles de l'UE couvrent la circulation et le commerce de certains végétaux, produits végétaux et autres objets qui peuvent menacer la santé des végétaux.

Les efforts de protection devraient viser à préserver, améliorer et rétablir la résilience des écosystèmes forestiers et leur multifonctionnalité dans la mesure où il s'agit d'un élément fondamental de l'infrastructure verte de l'UE qui fournit des services environnementaux essentiels ainsi que des matières premières.

Il convient de porter davantage d'attention à la prévention des incidences négatives sur les forêts qu'à l'atténuation des dommages et à la remise en état. Pour que les forêts puissent réagir face aux menaces et aux tendances futures, il faut renforcer la diversité génétique et protéger les ressources génétiques menacées.

Étant donné que la nature et les effets de certaines menaces sont transfrontières, une action au niveau de l'UE est nécessaire.

Les plans de gestion des forêts ou instruments équivalents fondés sur les principes de gestion durable des forêts sont des instruments clés qui fournissent de multiples biens et services de manière équilibrée. Ces plans sont au cœur de la stratégie de l'UE pour 2020 en faveur de la biodiversité et du financement européen au titre du développement rural. Cette stratégie les englobe et favorise et soutient leur utilisation.

Orientations stratégiques:

Les États membres:

- élaboreront, d'ici à 2020, avec l'aide de la Commission, un cadre conceptuel pour apprécier la valeur des services écosystémiques et favoriseront leur intégration dans les systèmes

[15] COM(2013) 216.

comptables aux niveaux national et de l'UE. Ils s'appuieront sur la cartographie des écosystèmes et de leurs services et sur l'évaluation de l'état de ces écosystèmes et services;

- devraient maintenir et renforcer la couverture forestière pour assurer la protection des sols et la régulation de la qualité et de la quantité des ressources hydriques en intégrant les pratiques sylvicoles durables dans le programme de mesures des plans de gestion de district hydrographique au titre de la directive-cadre sur l'eau et dans les programmes de développement rural;

- devraient, d'ici à 2020, améliorer de manière significative et mesurable l'état de conservation des espèces et des habitats forestiers en mettant pleinement en œuvre la législation de l'UE dans le domaine de la protection de la nature et en veillant à ce que les plans forestiers nationaux contribuent à la gestion adéquate du réseau Natura 2000. Ils devraient s'appuyer sur le guide relatif à Natura 2000 et aux forêts qui devrait paraître prochainement;

- mettront en œuvre le plan stratégique 2011-2020 pour la biodiversité et atteindront les objectifs d'Aichi adoptés dans le cadre de la convention sur la diversité biologique, sur la base du prochain cadre commun pour l'établissement de priorités en vue du rétablissement des écosystèmes;

- devraient renforcer la conservation de la génétique forestière (diversité des essences d'arbres) et la diversité au sein des essences et des peuplements. La Commission pourra apporter sa contribution en particulier grâce au programme de développement rural.

La Commission:

- suivra les progrès accomplis par les États membres en ce qui concerne l'adoption des plans de gestion des forêts ou d'instruments équivalents et l'intégration des considérations liées à la diversité biologique dans ces plans ou instruments, y compris les objectifs de conservation du réseau Natura 2000;

- devrait, en collaboration avec les États membres, renforcer les mécanismes de protection des forêts contre les ravageurs, sur la base d'une intensification de la coopération avec les pays voisins et de la recherche ainsi que du réexamen en cours du régime phytosanitaire;

- envisagera la possibilité d'étendre l'obligation d'appliquer, au sein de l'UE, la norme internationale pour les mesures phytosanitaires n° 15 relative aux matériaux d'emballage à base de bois et en évaluera les incidences;

- fournira aux parties à la convention des Nations unies sur la lutte contre la désertification les informations et les données pertinentes dont elle dispose afin de soutenir la mise en œuvre de leurs plans d'action pour la protection des forêts et des sols dans les zones les plus menacées par la dégradation des sols et la désertification. Elle aura notamment recours à cet effet au centre européen de données sur les forêts et au centre européen de données sur les sols.

***Améliorer la base de connaissances***

### *3.3.5 Quelles forêts avons-nous et quelles modifications subissent-elles?*

Il est nécessaire de renforcer la base de connaissances sur les forêts pour mieux comprendre les défis environnementaux et sociétaux complexes auxquels est confronté le secteur forestier.

Afin de pouvoir réaliser la cartographie des écosystèmes forestiers et de leurs services et d'évaluer l'état de ces écosystèmes et de ces services, il est indispensable de disposer de meilleures informations sur les forêts de l'UE. Les variables et les paramètres pertinents seront harmonisés au niveau de l'UE, sur la base d'une coopération entre les systèmes internationaux, paneuropéens et nationaux d'acquisition des données et d'une analyse détaillée des défis que l'UE doit relever. Des programmes de l'UE tels que LIFE+ pourraient contribuer à mobiliser les ressources nécessaires.

La Commission et les États membres ont mis au point un système modulaire d'information sur les forêts, et des travaux sur la biomasse et la biodiversité sont en cours.

Orientations stratégiques:

La Commission et les États membres:

- mettront en place le système européen d'information sur les forêts en collectant des informations harmonisées à l'échelle de l'Europe sur le rôle multifonctionnel des forêts et des ressources forestières et en intégrant plusieurs systèmes d'information (l'EFFIS[16] par exemple) et plateformes de données (l'EFDAC[17] par exemple) dans un système modulaire dynamique qui combine des données et des modèles dans des applications;

- aligneront les informations concernant les forêts de l'UE sur les exigences de l'UE en matière d'architecture de données (telles que INSPIRE[18], SEIS[19] et Copernicus[20]) de sorte qu'elles soient essentiellement fondées sur des données recueillies par les États membres, et suivront les processus internationaux et régionaux;

- encourageront le développement de la base de données de l'UE sur les matériels forestiers de reproduction, y compris les hyperliens donnant accès à des cartes et registres nationaux;

- amélioreront, rendront comparables et partageront les informations et les données de surveillance sur les forêts, en s'appuyant sur des expériences concluantes telles que l'EFFIS, les actions en faveur de la santé des forêts, les statistiques forestières de l'UE et l'EFDAC.

En étroite consultation avec les parties intéressées, la Commission:

- mettra en place plusieurs modules (par exemple sur les forêts et les perturbations naturelles comme les incendies et les ravageurs, les forêts et la bioéconomie, les forêts et le changement climatique ainsi que les forêts et les services écosystémiques) qui pourraient contribuer aux statistiques forestières de l'UE et à la comptabilité environnementale et économique intégrée de la forêt.

16 Système européen d'information sur les feux de forêts.
17 Centre européen de données sur les forêts.
18 Infrastructure d'information géographique dans la Communauté européenne (INSPIRE).
19 Système de partage d'informations sur l'environnement.
20 Programme d'observation de la Terre de la Commission européenne.

### *3.3.6 Produits forestiers nouveaux et innovants présentant une valeur ajoutée*

Pour stimuler l'innovation dans l'ensemble du secteur forestier, il est nécessaire de disposer, au niveau de l'UE, d'un domaine de recherche cohérent et ambitieux sur les forêts. Il devrait tenir compte des spécificités des forêts (longueur des processus, par exemple).

Les programmes-cadres de l'UE pour la recherche et le développement soutiennent le secteur forestier, qui est plus présent dans le 7e programme-cadre de recherche et dans «Horizon 2020», dans le droit fil de la stratégie bioéconomique pour l'Europe[21]. L'objectif est d'accroître la viabilité du secteur et sa contribution à l'économie rurale grâce à une gestion durable des forêts, d'améliorer sa capacité de réaction aux stress biotiques et abiotiques, et de mettre au point de meilleurs systèmes de production et produits forestiers.

Orientations stratégiques:

- la Commission aidera les États membres et les parties intéressées à transférer les connaissances technologiques et scientifiques vers les pratiques forestières et le marché, en particulier grâce à Horizon 2020 et au partenariat européen d'innovation pour la productivité et le développement durable de l'agriculture, afin de soutenir la mise au point de nouveaux produits à valeur ajoutée élevée;

- la Commission et les États membres devraient coopérer à la mise au point d'outils de recherche et de modélisation avancés afin de pouvoir combler les lacunes en matière de données et de connaissances, de manière à mieux comprendre les implications complexes des changements sociaux, économiques et environnementaux en rapport avec les forêts (identification des seuils environnementaux par exemple);

- le comité permanent de la recherche agricole (CPRA) sera sollicité pour renforcer la coordination des travaux de recherche et d'innovation entre l'UE, les États membres et les parties intéressées;

- la Commission veillera à ce que les résultats et les bonnes pratiques soient diffusés dans le cadre de la structure de gouvernance des forêts de l'UE et d'autres enceintes compétentes.

## ***Favoriser la coordination et la communication***

### *3.3.7 Travailler ensemble pour gérer nos forêts de manière cohérente et mieux les comprendre*

Les forêts font l'objet de diverses stratégies transversales dont les objectifs peuvent parfois différer. Par conséquent, la coordination, la coopération et la communication sont essentielles pour parvenir à une politique cohérente et logique.

[21] COM(2012) 60.

Plusieurs solutions visant à améliorer la coordination et la mise en œuvre ont été examinées avec les États membres, parmi lesquelles une directive-cadre sur la gestion durable des forêts. Toutefois, aucun consensus allant au-delà d'une approche volontaire ne s'est dégagé. En tout état de cause, il est impératif d'améliorer les liens avec les politiques en rapport avec les forêts.

La structure actuelle de gouvernance des forêts de l'UE[22] repose sur le comité permanent forestier[23] (CPF). Ce comité devrait rester le forum utilisé pour débattre de toutes les questions liées aux forêts, assurant ainsi la coordination et la cohérence des politiques en rapport avec les forêts. Cependant, des améliorations sont nécessaires pour garantir que le CPF tienne compte des contributions issues d'autres politiques. Le CPF a travaillé avec le groupe consultatif «Forêts, y inclus liège», le comité «Habitat» et le groupe d'experts sur la gestion de Natura 2000 afin d'élaborer conjointement le guide relatif à Natura 2000 et aux forêts, qui pourrait être utilisé comme recueil de bonnes pratiques. Il serait également possible de mettre davantage l'accent sur le rôle que joue le CPF dans le maintien du caractère multifonctionnel des forêts.

Le comité consultatif «Forêts, y inclus liège»[24] restera la principale plateforme associant les différentes parties intéressées utilisée pour examiner les questions ayant trait à la sylviculture et à la gestion durable des forêts, et le comité consultatif de politique communautaire de la filière bois[25] restera la principale plateforme de discussion pour les questions relatives aux chaînes de valeur industrielles.

C'est sur ces trois instances que devraient reposer le développement et le suivi de la nouvelle stratégie.

La communication constitue un défi particulier pour le secteur, étant donné que le public n'est généralement pas conscient de l'importance que revêt la gestion durable des forêts, ni des différentes modalités de contribution du secteur forestier à l'économie verte.

Orientations stratégiques:

- la Commission veillera à ce que les travaux du comité permanent forestier s'appuient sur d'autres politiques de l'UE ayant une incidence sur les forêts et le secteur forestier, en garantissant que la gestion des forêts de l'UE reste multifonctionnelle;

- la Commission et les États membres examineront différentes solutions pour mieux coordonner la gestion durable des forêts, l'harmonisation des informations sur les forêts et la coopération entre et avec les États membres;

- la Commission créera un réseau de bureaux européens des forêts (inventaires forestiers nationaux, IFN) chargé de définir des critères harmonisés applicables aux données issues des

[22] Décrite dans le document de travail des services de la Commission.
[23] Décision 89/367/CEE du Conseil.
[24] Décision 2004/391/CE de la Commission.
[25] Décision 97/837/CE de la Commission.

IFN. Il est prévu de mener des travaux complémentaires dans le cadre d'actions et de projets de recherche COST;

- les États membres devraient améliorer les informations destinées au grand public sur les forêts et le bois, en s'appuyant sur la stratégie de communication de l'UE relative aux forêts mise en place par le CPF[26];

- la Commission continuera à évaluer la perception des forêts par le public (au moyen d'une enquête Eurobaromètre qui sera menée d'ici à 2015).

### *3.3.8 Les forêts dans une perspective mondiale*

Au niveau paneuropéen, l'accent est mis sur les négociations en cours pour établir un accord juridiquement contraignant sur les forêts, avec l'UE en tant qu'acteur clé. Grâce à cet accord, l'UE entend améliorer la gestion durable des forêts à l'échelle de l'Europe. À cet égard, la nouvelle stratégie constitue un instrument approprié pour la mise en œuvre de l'accord.

Au niveau mondial, l'UE est en première ligne de la lutte contre la déforestation et la dégradation des forêts. Elle soutient une gestion durable des forêts en vue de protéger la biodiversité, de lutter contre la désertification et de s'attaquer au changement climatique, tout en veillant à ce que les écosystèmes forestiers fournissent des biens et des services. Elle contribue ainsi au développement durable et à l'éradication de la pauvreté. Ces objectifs sont poursuivis dans le cadre de REDD+, de FLEGT[27] et du règlement de l'UE sur le bois[28]. D'ici à 2015, la Commission réexaminera le fonctionnement et l'efficacité de ce règlement.

La présente stratégie vise à garantir la cohérence, au niveau international, entre les politiques, les objectifs et les engagements de l'UE et des États membres sur les questions liées aux forêts. Elle soutient l'UE et les États membres en formulant des objectifs clairs et cohérents.

Orientations stratégiques:

La Commission et les États membres:

- garantiront la cohérence, au niveau international, entre les politiques et les engagements de l'UE et des États membres sur les questions liées aux forêts;

- soutiendront une gestion durable des forêts en Europe et ailleurs dans le monde, en insistant sur le rôle que les forêts peuvent jouer dans la transition vers une économie verte, dans le contexte de la coopération au développement et de l'action extérieure de l'UE;

- apporteront, dans le cadre du plan d'action FLEGT, un soutien permanent aux efforts déployés au niveau mondial pour lutter contre l'exploitation illégale des forêts;

- soutiendront, dans le cadre de REDD+, les efforts déployés par les pays en développement pour améliorer leur réglementation et leurs politiques forestières, consolider la gouvernance

[26] http://ec.europa.eu/agriculture/fore/publi/

[27] Règlement (CE) n° 2173/2005 concernant la mise en place d'un régime d'autorisation FLEGT relatif aux importations de bois dans la Communauté européenne.

[28] Règlement (UE) n° 995/2010.

forestière, apprécier la valeur des écosystèmes forestiers et les surveiller et s'attaquer aux causes de la déforestation et de la dégradation des forêts.

La Commission:

- évaluera les incidences environnementales de la consommation dans l'UE de produits et de matières premières susceptibles de contribuer à la déforestation et à la dégradation des forêts en dehors de l'UE. Le cas échéant, elle envisagera des options stratégiques pour limiter ces incidences, notamment l'élaboration d'un plan d'action de l'Union européenne sur la déforestation et la dégradation des forêts. Ces actions seront menées dans la droite ligne du 7e programme d'action de l'UE pour l'environnement.

## 4 TRADUIRE LES PRINCIPES EN ACTION: CONJUGUER NOS EFFORTS DANS L'INTERET DE NOS FORETS ET DE NOTRE SECTEUR FORESTIER

La Commission et les États membres, dans les limites de leurs compétences respectives, assureront la mise en œuvre et le suivi de la stratégie, en accordant une attention particulière à la participation des parties intéressées.

Afin de fixer des jalons pour la réalisation des objectifs pour 2020 en ce qui concerne les forêts et de prendre en compte les priorités stratégiques des actions en matière de politique forestière et de politiques relatives aux forêts, la Commission collaborera avec le comité permanent forestier pour renforcer les liens avec les politiques connexes de l'UE. Si nécessaire, elle coopérera avec d'autres comités et instances. Compte tenu de l'importance que les fonds de l'UE revêtent pour les forêts et le secteur forestier, il est nécessaire d'améliorer la qualité des débats au niveau de l'UE.

D'autres domaines dans lesquels les États membres devraient continuer à progresser seront identifiés (prévention des incendies de forêt, lutte contre les ravageurs et les maladies, promotion de l'exploitation durable du bois et coopération régionale et interrégionale).

Les forêts et le secteur forestier bénéficient actuellement d'un financement important de l'UE. Les mesures forestières au titre du règlement relatif au développement rural constituent le pilier financier de la stratégie (90 % du financement total de l'UE en faveur du secteur forestier). Conformément aux plans mis à jour, 5,4 milliards d'euros du Fonds européen agricole pour le développement rural ont été alloués aux mesures forestières entre 2007 et 2013. On pourrait s'attendre, même si cela dépendra des plans de développement rural des États membres, à ce que le niveau de dépenses pour la période 2014-2020 soit similaire à celui de la période actuelle. Ces dépenses devraient servir à contribuer à la réalisation des objectifs de la présente stratégie, et en particulier à faire en sorte que les forêts de l'UE soient gérées selon les principes de la gestion durable et que la démonstration puisse en être faite. LIFE+ est axé sur la conservation de la nature, l'adaptation au changement climatique et la satisfaction des besoins en matière de protection et d'information; les Fonds structurels soutiennent les projets de cohésion et Horizon 2020 soutient les actions de recherche et d'innovation, et notamment le partenariat public-privé sur les bio-industries. Des financements sont également accordés aux pays tiers au titre des politiques en matière de développement et de changement climatique, notamment grâce aux fonds de développement de l'UE, à REDD+ et à FLEGT. La rationalisation des ressources disponibles et l'amélioration de la coordination entre les financements de l'UE et les financements nationaux peuvent se traduire par une meilleure mise en œuvre de la stratégie.

## 5 CONCLUSIONS

En l'absence de politique forestière commune de l'UE et de cadre directeur commun pour les questions liées aux forêts, il est nécessaire de mettre en place une stratégie pour les forêts et le secteur forestier. Étant donné qu'un nombre croissant de politiques de l'UE font peser sur les forêts des exigences toujours plus fortes, il est nécessaire de coordonner les politiques sectorielles. Il est également indispensable de convenir d'une vision stratégique globale des questions relatives aux forêts, et de veiller à ce que les politiques forestières nationales prennent pleinement en considération les politiques de l'UE qui y sont liées. Toutes ces mesures permettront de renforcer la capacité d'adaptation des forêts et du secteur forestier face aux changements qui surviennent dans différents domaines.

La présente stratégie vise à placer les forêts et le secteur forestier au cœur de l'évolution vers une économie verte et à apprécier la valeur des avantages que les forêts peuvent offrir de manière durable, tout en assurant leur protection. Un engagement et un soutien politique solides de toutes les parties intéressées s'imposent à cet égard.

La stratégie sera réexaminée d'ici à 2018 pour évaluer les progrès accomplis dans sa mise en œuvre.

Le Parlement européen et le Conseil sont invités à soutenir la présente stratégie et à donner leur avis sur sa mise en œuvre.