

Societal perceptions and policy framework of the forest-based sector in Europe

Preliminary findings from WP2

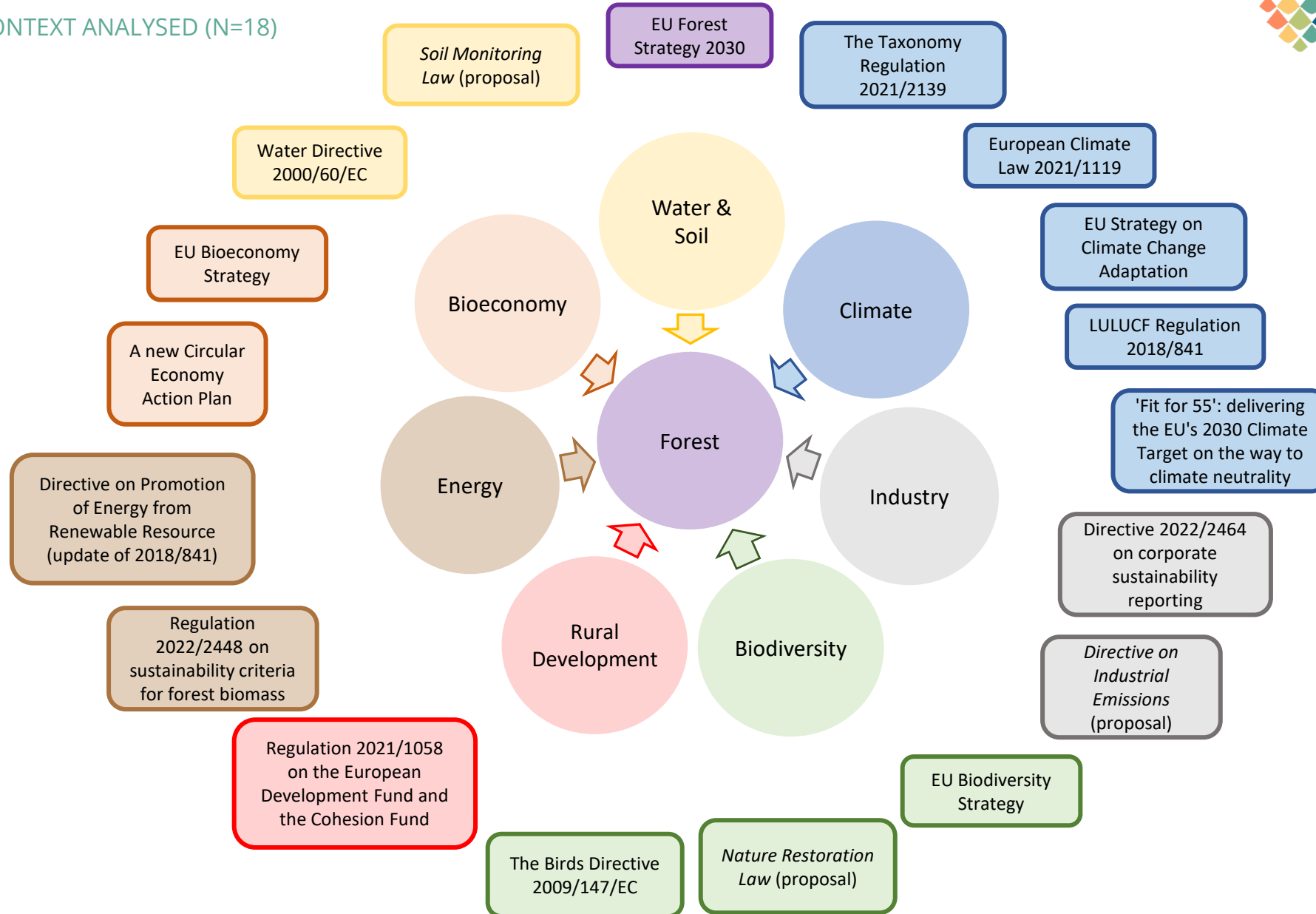
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EUFORE
European Forest Research and Innovation Ecosystem

Task 2.2 Multi-level analysis of the sector's policy framework

❖ EU POLICY CONTEXT ANALYSED (N=18)



Task 2.2 Multi-level analysis of the sector's policy framework

❖ SYNTHESIS OF MAIN OBJECTIVES BY SECTOR



| Biodiversity | Forest | Water & Soil | Bioeconomy | Climate | Energy | Rural Development | Industry & Investment |
|--|--|---|--|--|---|--|--|
| <p>Biodiversity recovery, stronger protection, and its expansion, resilient ecosystems.</p> <p>Protect 30% of the EU's land, with a third of it under strict protection by 2030. By 2030, 20% of the EU land that needs to be restored to be under restoration measures, and by 2050, all ecosystems need restoration to have those measures applied. Plant 3 billion new trees. 30 % of habitats reach favourable conservation status (2030), 60% (2040), and 100% (2050). Halve the number of Red List species (2030). Forestry-related specific goals: EF indicators (e.g. forest connectivity) to reach satisfactory levels</p> | <p>A sustainable forest bioeconomy securing local economies and livelihoods, based on sustainable forest management, securing restoration, protection (roadmap to plant 3 billion trees by 2030), and resilience of EU's forests. Important in climate change mitigation (carbon sequestration).</p> | <p>Protection, conservation, reduction of pollution, and sustainable management and use of water and soil.</p> <p>Mitigation of climate change and natural disasters through strengthening the resilience of both systems. Soil indicators and their desirable values fulfilled by 2050.</p> | <p>Ensuring food and nutrition security, with a circular production. Sustainable management of natural resources and sustainable product design (including construction products) that reduce dependence on non-renewables. Creation of 1 million new jobs, land degradation neutrality (SDGs, 2030), 300 new biorefineries by 2030)</p> | <p>Reversing biodiversity loss, restoration of ecosystems, climate change mitigation and adaptation, promoting a circular bioeconomy, sustainable management of forests, and implementing nature-based solutions. By 2050, reach a climate-resilient society. Reduction of 55% emissions, by 2030.</p> | <p>Increasing the use of renewable energy to 40% by 2030. Biodiversity protection and contribution to climate objectives. Setting sustainability criteria for forest biomass harvest.</p> | <p>Reducing development disparities between various EU regions. Preserving, protecting, and improving the quality of the environment, and supporting climate actions. Sustainable development principle, with an emphasis on social aspects.</p> | <p>Establishing EU's sustainable finance framework. Providing information to assess investment risks arising from climate change and other sustainability issues. Setting rules on prevention and control of pollution rising from industrial activities (climate-netural by 2050). Reduction of emissions and protection of human health and environment.</p> |

Task 2.2 Multi-level analysis of the sector's policy framework

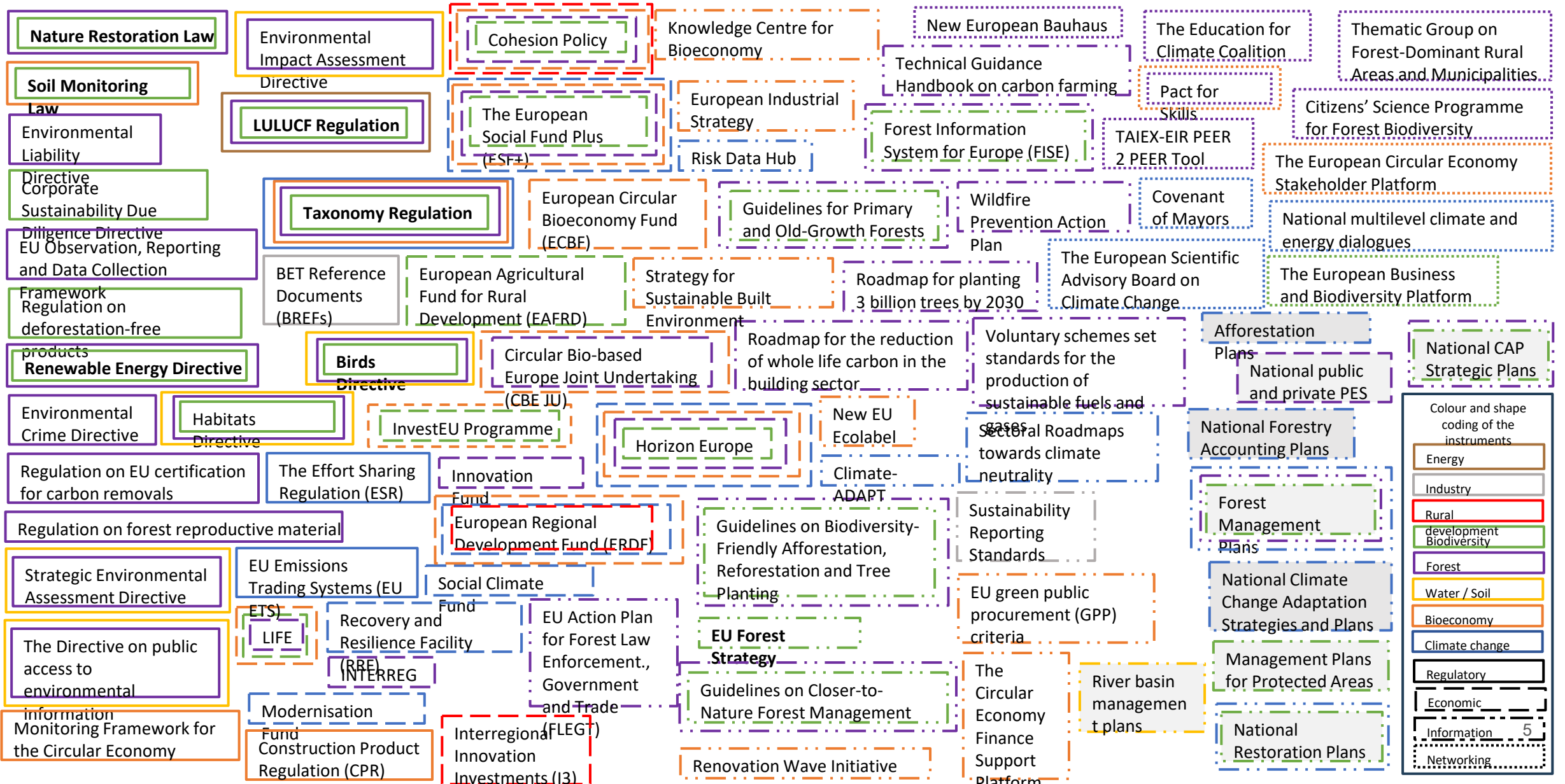


❖ SYNTHESIS OF MAIN SYNERGIES AND CONFLICTS BY SECTOR

| | Biodiversity | Forest | Water & Soil | Bioeconomy | Climate | Energy | Rural Development | Industry & Investment |
|------------------|---|---|--|---|--|--|---|--|
| Synergies | Recognition of multifunctional use of FEs . Emphasis on the interlink between biodiversity provision and climate change mitigation. Optimisation of uses | Multifunctional uses are possible. Emphasis on the need for wood production and bioeconomy to respect biodiversity preservation and fulfil climate change mitigation needs. Synergies between the tourism industry and biodiversity conservation . | Synergies between all supporting and regulating services . This way contributes to human health and well-being . | Synergies mentioned across EU goals in Energy, Climate, CAP, and Industry but forest not explicitly mentioned- | Recognition of multifunctionality of forests . Synergies on Biodiversity, Circular Economy, Zero pollution plans, Forest strategy, Sustainable Finance . | Use of renewable energy contributes to halting biodiversity loss and climate change mitigation . | Environmental goals and sustainable development of rural regions . | New standards that address environmental, social and governance matters. New rules for all forest-related industries (Energy, chemical, wood harvesting and processing) |
| Conflicts | None explicitly mentioned . | Increasing and competing demands on forests – wood needs to be produced within sustainability limits . | Soil policies highlight the conflicts and impacts between various land uses and management approaches . | No forest use was mentioned. Possible barriers between EU funding and national, regional, and local level legislations . Regulatory conditions (in comparison with fossil fuel). | No conflicts were directly addressed. | Biomass for energy and non-energy use (forest carbon sinks, high biodiversity areas vers. Production of biomass) – solution in setting principle of cascading use | Land use for carbon storage and biodiversity protection vers. Land-based economic activities . | Stronger emphasis on climate change, circular economy, and resource/efficiency goals can pose a challenge for forest-based industries and activities. Conflict between carbon storage in living biomass and wood products . |

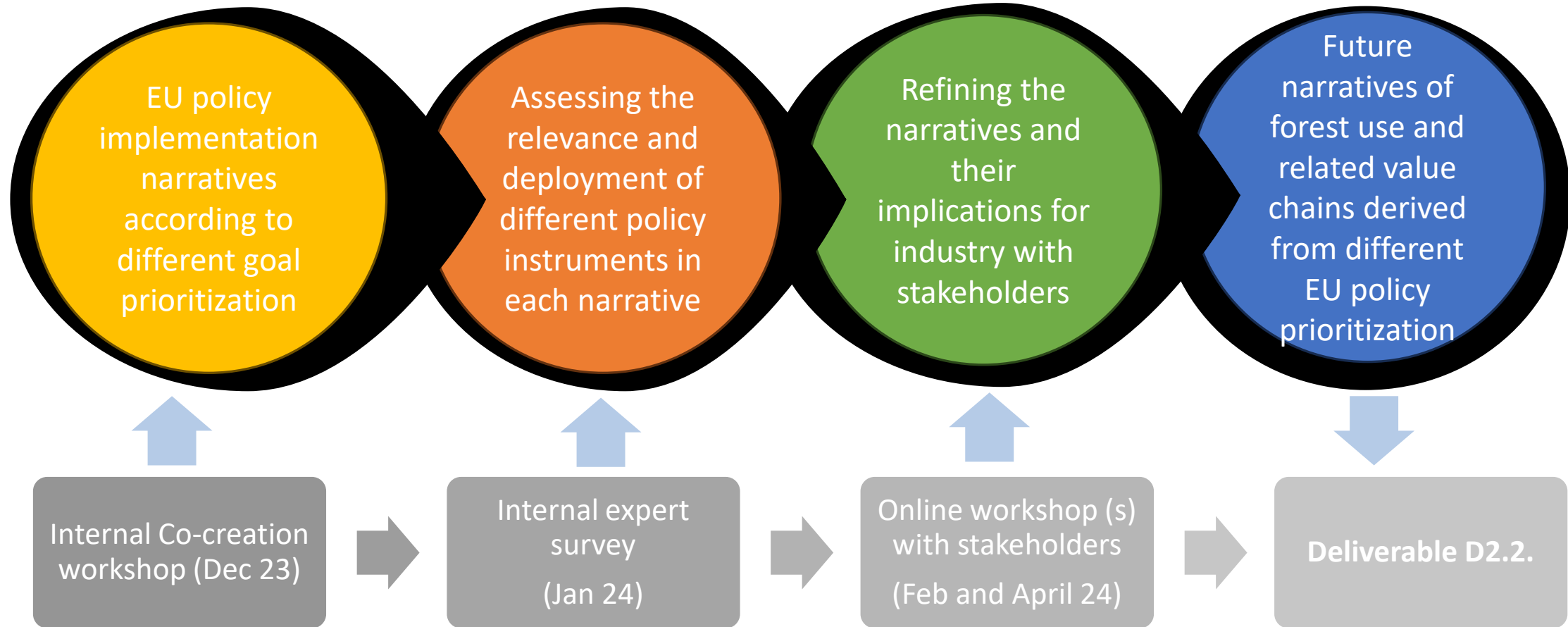
Task 2.2 Multi-level analysis of the sector's policy framework

❖ MAPPING OF ALL THE INSTRUMENTS IDENTIFIED THROUGH THE POLICY ANALYSIS (N=79)



Task 2.2 Multi-level analysis of the sector's policy framework

❖ WORK FLOW



Task 2.1 Societal expectations towards and perceptions of Europe's forests, forestry and the forest-based sector

Contents:

(I) a literature review

(II) focus groups and interviews across Europe's regions (North, Central, West, East and Southern Europe)

(III) conducting a statistically representative survey on the same topic, distributed to at least 20 European countries.



Survey objectives:

- The importance of a range of forest ecosystem services at both the individual and societal level.
 - At the societal level, we frame the questions to elicit current and future importance of forest ecosystem services.
- The importance of where forest ecosystem services are provided, e.g., locally, nationally, and within the EU.
- Statements reflecting varying views on the forest-based sector identified within the literature and measure how strongly respondents agree or disagree with these statements.
- **TIMELINE:** Launch of survey in January 2024. Results from May 2024.

Task 2.3

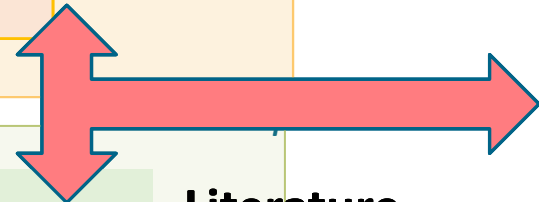
Assessment of the sustainable supply of Europe's forest resources and their valorisation in the forest-based sector

SURVEY: Effects of changes in the operational environment on forest resources and potential timber supply

- The survey asks “*Views on the...*”:
- 2) largeness of effects of **changes in operational environment**
 - 3) effects of changes in **forest management**
 - 4) effects of **land use changes**
 - 5) effects of **climate change**
 - 6) effects of production of **non-wood goods and marketed services**
 - 7) effects of safeguarding **forest resilience and biodiversity**
 - 8) effects of **provision of cultural and social services**
 - 9) effects of **change in forest ownership**

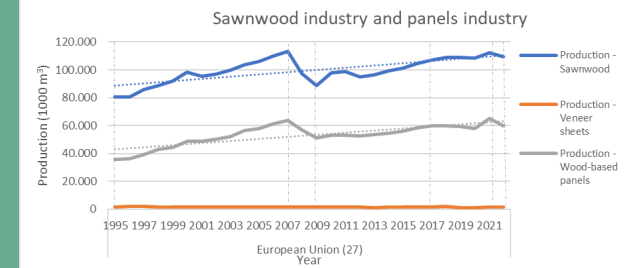
Forest resources and wood supply trends

Literature review & Survey



SCENARIOS until 2040

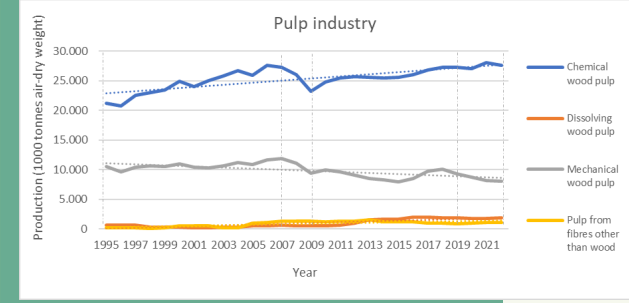
Construction, furniture and packaging (pallets)



EU-27, selected countries
Scenarios by sectorial associations (sawmill industry, panel industry, construction sector, etc.)
Policies affecting wood demand etc.

Literature review & Interviews

Biorefinery, new materials and “new territories”



Wood demand trends

Paper and packaging

