



**European Committee  
of the Regions**

**Commission for  
Natural Resources**

**NAT**

# **Sustainable Forest Management in Regions**



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# List of acronyms

<b>BBB JU</b>	Bio-based Industry Joint Undertaking
<b>CF</b>	Cohesion Fund
<b>COR/CdR</b>	European Committee of the Regions/ Comité européen des régions
<b>DG AGRI</b>	Directorate-General for Agriculture and Rural Development
<b>EAFRD</b>	European Agricultural Fund for Rural Development
<b>EASME</b>	Executive Agency for Small and Medium-sized Enterprises
<b>EC</b>	European Commission
<b>EIB</b>	European Investment Bank
<b>EIP-AGRI</b>	European Innovation Partnership for Agricultural Productivity and Sustainability
<b>ERDF</b>	European Regional Development Fund
<b>ESF</b>	European Social Fund
<b>ESIF</b>	European Structural and Investment Funds
<b>ETC</b>	European Territorial Cooperation
<b>EU</b>	European Union
<b>EUR</b>	Euro
<b>FAO</b>	Food and Agricultural Organization
<b>FRA</b>	Forest Resources Assessment
<b>FSC</b>	Forest Stewardship Council
<b>FTP</b>	Forest-based Sector Technology Platform
<b>ha</b>	hectares
<b>LRAs</b>	Local and Regional Authorities
<b>MAP</b>	Multi-annual implementation plan
<b>MS</b>	Member States
<b>PEFC</b>	Programme for the Endorsement of Forest Certification
<b>RDPs</b>	Rural Development Programmes
<b>SFM</b>	Sustainable Forest Management
<b>UNECE</b>	United Nations Economic Commission for Europe



# Summary

Forests owned by local and regional authorities (LRAs) across the European Union (EU) represent an estimated 14% of the total EU forest area, equivalent to about 22 million of hectares. LRAs do not only own forests. They also manage forests, administer forest policy implementation, enforce forest laws, and provide support to private forest management.

This study is meant to contribute to the upcoming review of the EU Forest Strategy (COM(2013)659) by collecting insights of LRAs' experience in forest management, of their opinion on the impact the EU Forest Strategy has had so far at the territorial level, and of their expectations on the future priorities of the EU forest policy.

In terms of type of owners, forests' ownership at the sub-national level is prevalently (80%) with local authorities (municipalities, provinces, counties). Across the EU, local authorities own some 17.4 million hectares of forests and regional authorities about 4.5 million hectares of forests. In terms of distribution, sub-national public ownership of forests characterises the continental and the southern parts of Europe. The highest shares of forests owned by LRAs are found in Germany (48% of total forest area), Belgium (37%), Spain (37%), Luxembourg (34%) and Italy (24%). In eight EU countries, LRAs have either no forest ownership (Croatia, Cyprus, Ireland, Lithuania and Malta) or a share of forest ownership which is below 1% of the total forest area (Hungary, Poland and Portugal).

Within the framework of this study, LRAs owning/managing forests were consulted by means of an online questionnaire. Because of the specificity of the topic and the difficulty in identifying 'informed' invitees, significant resources were deployed to mobilise respondents. As a result, a total of 70 questionnaires from 14 EU countries were received (i.e. submitted online), 40% of which were from regional authorities and the remaining 60% from local authorities. This number represents a rather low rate of response (below 10%) if compared to the dissemination effort. However, it is believed that completed questionnaires came from respondents who were sufficiently motivated and informed. Responding LRAs are forest managers (41%), forest owners (27%) or both (31%). Their forests are prevalently used for protection and conservation purposes, for social functions, and for timber production. The use of management plans, the inclusion of biodiversity considerations in these plans, and the pursuit of sustainable forest management principles appear to be common practices for the majority of them (76%). In addition, 39% of the public authorities participating in the consultation have some or all of their forests certified. This share rises to

46% for regional authorities. Overall, the evidence collected through the questionnaire and complemented with cases gathered through desk research shows that LRAs may be very active forest owners as well as forest managers who are concerned about sustainable management practices.

As regards impact and according to the opinion and experience of the participants in the consultation, the EU Forest Strategy has so far progressed rather unsatisfactorily towards its main objectives. In particular, it is not considered to have contributed enough to stimulate the growth of forest-based industries (scored an average 4.8 on a scale from 1 to 10), and to satisfy the growing demand for raw material for existing and new products as well as for renewable energy (average score 5). Respondents have a slightly more positive perception of the impact forests and their management have at the territorial level, especially in terms of the improvement of the quality of the environment, and of citizens' quality of life. However, the contribution of forests and their management to economic growth, job creation and rural development is still limited (on a scale from 1 to 10, average scores are 5.7, 5.5 and 5.8, respectively). Another area of concern relates to engagement. The EU Forest Strategy has apparently not succeeded in reaching out to institutional stakeholders at the local and regional level. More than two-thirds of the respondents state that their entity has not benefitted from general engagement activities such as EU level dissemination of forest-related results and good practices (70%) or EC forest-related information and communication activities (77%). With regard to some sector-specific initiatives of the EC, including in the regulatory domain, an important part of the respondents is not aware of them, pointing to evident problems in communication flows.

The analysis of the funding of the forest sector highlights that, for the programming period 2014-2020, an overall (under)estimated amount of EUR 7.6 billion has benefitted forest-related activities, out of which about EUR 5.1 billion (67%) is contributed by EU funds. More precisely, EUR 7,132 million have been earmarked to the sector through Measure 8 and Measure 15 of the Rural Development Programmes (RDPs); EUR 93 million have been mobilised under the European regional policy (Interreg and the Solidarity Fund); and at least EUR 378 million have been mobilised under EU programmes directly managed by the EC (Horizon 2020, LIFE, and Erasmus+). In addition to grants and co-financing, about EUR 300 million have been lent through the European Investment Bank (EIB) and other funds aimed at facilitating investments in the sector. Therefore, to date allocations through RDPs represent 94% of the total funding of the sector, confirming the approach reiterated in the EU Forest Strategy to support forest-related activities mainly through the rural development policy. Although this approach is agreed by the majority of respondents (61%), funding needs remain unmet for almost half of them (47%)

while a significant 37% admits that their entity does not use the European Agricultural Fund for Rural Development (EAFRD) for their forests.

As regards expectations for the future, the majority of the consulted LRAs believe that the EU Forest Strategy is still a very important or an important framework for the development of the sector. In particular, some 60-70% of the respondents appreciate it as a strategic framework for the further exploration and promotion of the use of wood; the assessment of sustainability issues related to the use of forest biomass; the improvement of sectorial knowledge; and the provision of support to sectorial research and innovation. Notably, the EU Forest Strategy is considered an even more important framework for valuing forests, from the improvement of forests' mitigation potential and the enhancement of forests' adaptive capacity and resilience, to the valuing of ecosystem services. Instead, respondents are less convinced on the suitability of the EU Forest Strategy to stimulate market growth and internationalise EU forest-based industry products.

In the opinion and experience of respondents, main obstacles to the contribution of local and regional authorities to key objectives of the EU Forest Strategy are both structural and strategic. More specifically, 'problems related to forest ownership' is by far the most selected obstacle (64% of the selections), followed by the 'lack of coherence among the various policies which affect forestry' (59% of the selections). 'Unmet funding needs' and the 'existence of in-country conflicts at the institutional level' represent a concern for almost half of the respondents (47% and 46%, respectively). 'Insufficient economic benefits' derived from forestry is an obstacle for 41% of the respondents. Therefore, with a view to bring more benefits to the territorial level, respondents believe that in the future the EU Forest Strategy should, above all, prioritise placing a value on forest-related public goods and services (67% of the selections), emphasise the contribution of the forest sector to climate change mitigation in the EU (60%), improve the governance structure in order to better reach out to forest owners and managers (56%), and make data readily available to stakeholders (54%).

In line with the above findings, considerations for the future review of the EU Forest Strategy relate to two main aspects: the facilitation of LRAs' contribution towards the accomplishment of the EU Forest Strategy's objectives, and the meeting of LRAs' expectations for the sector.

There is evidence that LRAs may be active forest owners and/or managers who are concerned about sustainable management practices. There is also evidence that they may influence the behaviours of other forest owners, including private ones, and involve them in active and sustainable management. Facilitating LRAs' contribution to the implementation of the EU Forest Strategy is therefore

expected to bring multiple benefits. Towards this scope, accessibility to adequate EU funding needs to be improved. Apart from the RDPs, there are multiple funding sources for the forest sector but for those stakeholders who do not benefit from the EAFRD these alternative sources represent, overall, a very low share of the EU funds made available for forestry (less than 10%). Increasing the availability or accessibility of instruments facilitating investments at the territorial level is similarly important. Other areas where improvement is needed in order to enhance the role of LRAs in sustainable forest management relate to communication, engagement, information/data availability and dissemination, including in terms of good/best practices.

In terms of LRAs' expectations for the sector, the call is for increasing the coherence among the various EU policies which affect forestry as the guidance function of the EU Forest Strategy is undermined by uncoordinated EU policies. LRAs owning/managing forests appear to be left with the burden of finding trade-offs at the territorial level between policy drivers, market forces and societal demands. Another priority for LRAs is the revision of the governance structure of the EU Forest Strategy to improve the strategy's capacity to reach out to those stakeholders that are actually implementing it on the ground. A third important priority relates to economic aspects. The expectation is that forest-based activities become economically viable and profitable. This requires placing a value on forest-related public goods and services, including the contribution to conservation and protection goals. Regarding the state of forests and forests' functions, enhancing the resilience of forests to climate change and adversities as well as emphasising the contribution of the forest sector to climate change mitigation is considered another priority for the future.

# Part 1 Introduction

## 1.1 Background

In September 2013, ‘A new EU Forest Strategy: for forests and the forest-based sector’ (COM(2013)659) (hereafter the ‘EU Forest Strategy’) was adopted by the European Commission (EC). In line with the principles of shared responsibility and subsidiarity, the strategy is not legally binding on Member States. Forest policymaking is a competence of individual countries and the European strategic framework fulfils a guidance function only, through which **harmonisation of the effects of the various national policies and laws** on forestry is attempted. Since there are other policy areas such as environment and agriculture where EU binding legislation on forestry is issued, the EU Forest Strategy also aims at **coordinating the EU approach in the forest sector**. At a pan-European level, cooperation among forest policies is further supported by the process of [Forest Europe](#), through which signatory countries voluntarily commit to common goals and practices in forestry.

In September 2015, two years after the publishing of the EU Forest Strategy, the EC prepared a multi-annual implementation plan (MAP) (SWD(2015) 164). The so called ‘Forest MAP’ was finalised “*In line with the Council conclusions on the EU Forest Strategy supported by the European Parliament own-initiative report as well as by the Opinion of both the Economic and Social Committee and the Committee of the Regions*” (EC, 2015) and in consultation with the various categories of stakeholders represented within the EU forest governance structure. The plan did not propose new commitments on the part of the EC but detailed the list of actions envisaged to be carried out over the period 2015-2020 as well as the specification of the actors, of the time plan, and of the expected outcomes (EC, 2015). As also reiterated in the MAP, a mid-term review of the EU Forest Strategy is due by 2018. The review is expected to assess progress in implementation and to **decide on the future priorities for forests and the forest sector**.

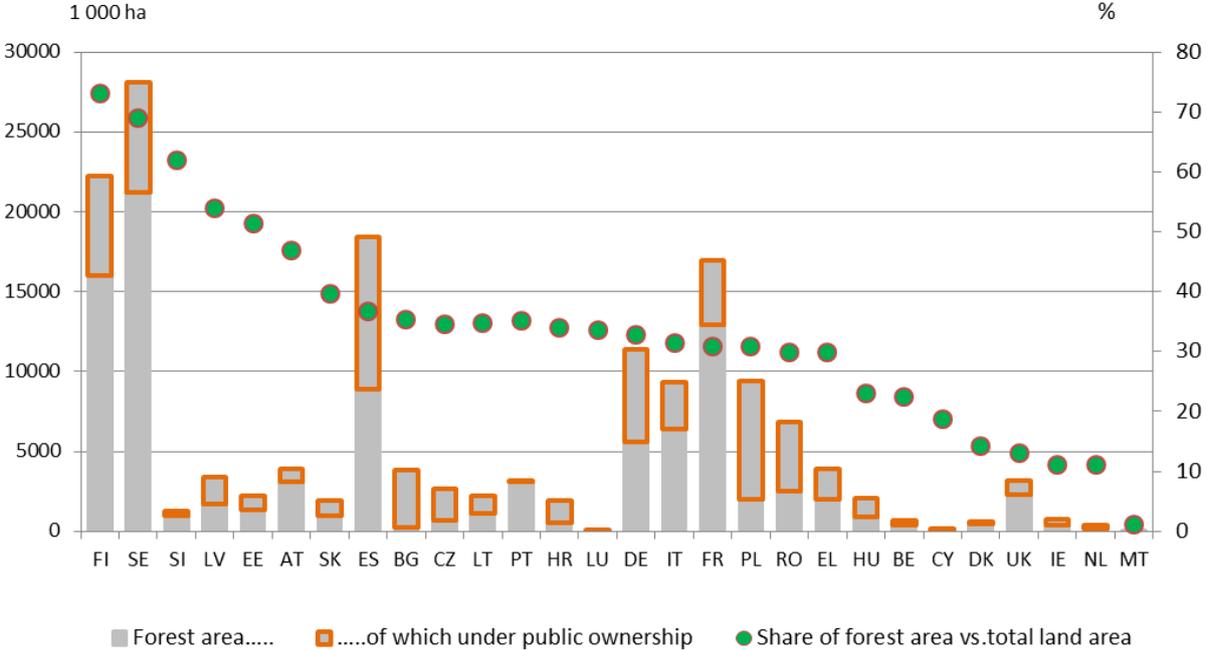
The decision of the European Committee of the Regions (COR) to consult local and regional authorities (LRAs) with respect to the updating of the EU Forest Strategy is justified by the relevance LRAs have in developing the sector. **Forests owned by LRAs** across the EU represent an estimated **14% of the total EU forest area** (see section 1.2 below). LRAs also manage forests, administer forest policy implementation, enforce forest laws, and provide support to private forest management. In practice, LRAs are not only ‘*important stakeholders in forestry-related matters*’ but, as forest owners, they are also ‘*genuine interested parties*’ (COR, 2018). This study collects insights of LRAs’ experience in forest

management, of their opinion on the impact the EU Forest Strategy has had so far at the territorial level, and of their expectations on the future priorities of EU forest policy. This information, meant to **contribute to the upcoming review of the EU Forest Strategy**, is largely grounded on the creation of new data (primary data) realised through the carrying out of a consultation among sub-national public authorities owning and/or managing forests across the EU (Parts 2, 3 and 4). Findings of the consultation are complemented by evidence gathered through desk research (secondary data).

## 1.2 Forest area and ownership by local and regional authorities

In 2015, forest area in the European Union covered some 160.9 million hectares (ha). All Member States (MS) have some forest area but its extension with respect to total land area varies greatly across countries. **Finland, Sweden and Slovenia** are the countries which have **more than 60% of their territory covered by forest area** (Figure 1). The lowest coverage is found in Malta (1% of total land area).

**Figure 1. Forest area and ownership, by country, 2015**

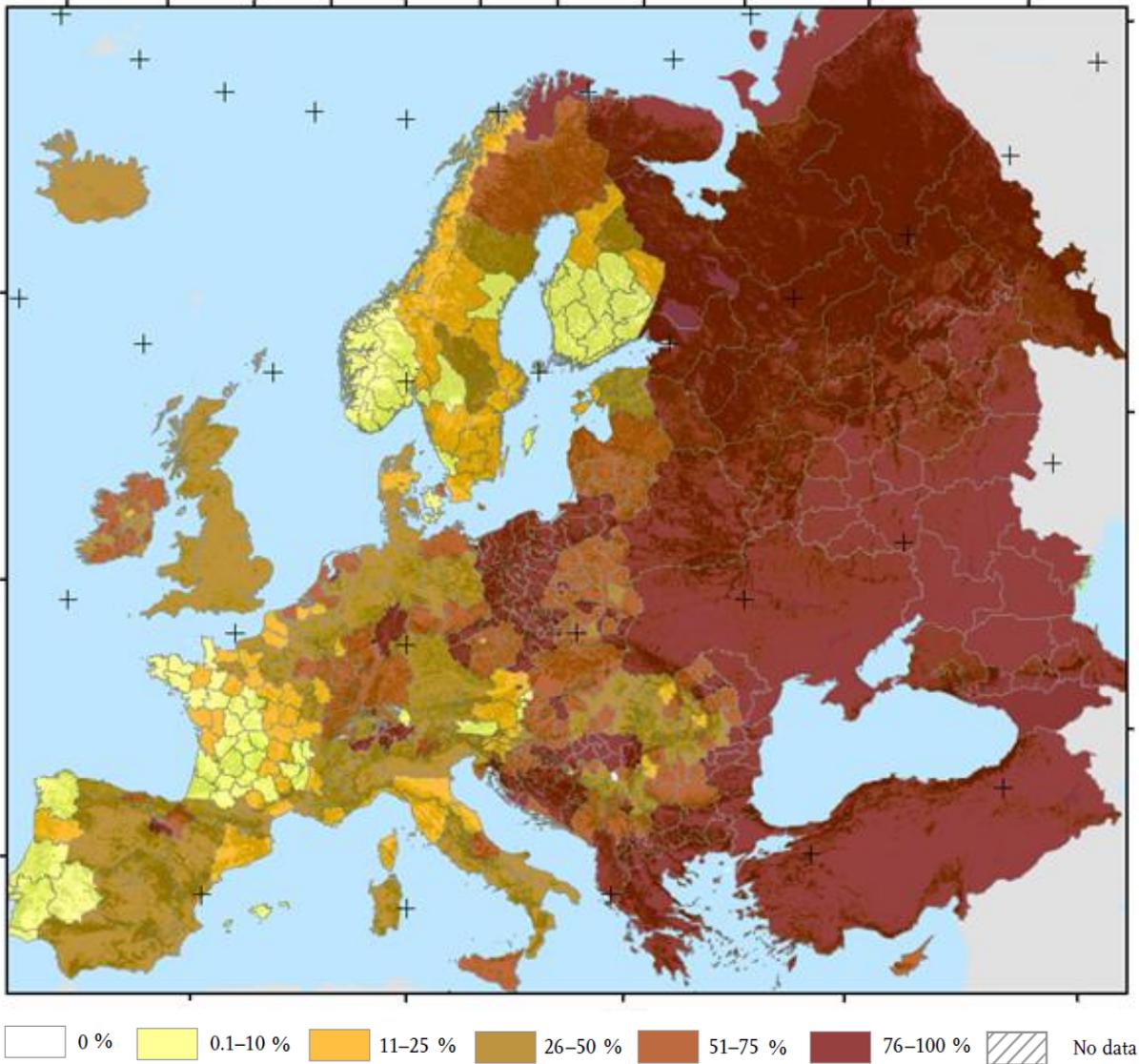


Notes: data are from FOREST EUROPE/UNECE/FAO, accessed on May 2018 at the [UNECE Statistical Database](#)

A total of **65 million ha of EU forest area is publicly owned**. This represents **40% of European forests**. Figure 1 shows that public ownership prevails in Bulgaria (93% of total forest area), Poland (79%), Czech Republic (76%) and Croatia (72%). In the EU, the lowest share of public ownership of forests is found in Portugal (3% of total forest area). In terms of extension, the **largest area of public forests is found in Spain** (9.5 million ha). Poland (7.4 million ha), Sweden (6.9 million ha) and Finland (6.2 million ha) follow.

Figure 2 shows the distribution of publicly owned forests across the EU. The mapping is based on data from the Global Forest Resources Assessment 2010. It clearly indicates the prevalence of public forests in the eastern and south-eastern parts of Europe, in a core area of central Europe, and in the northern parts of Sweden and Finland.

**Figure 2. Proportion of forest land in public ownership**

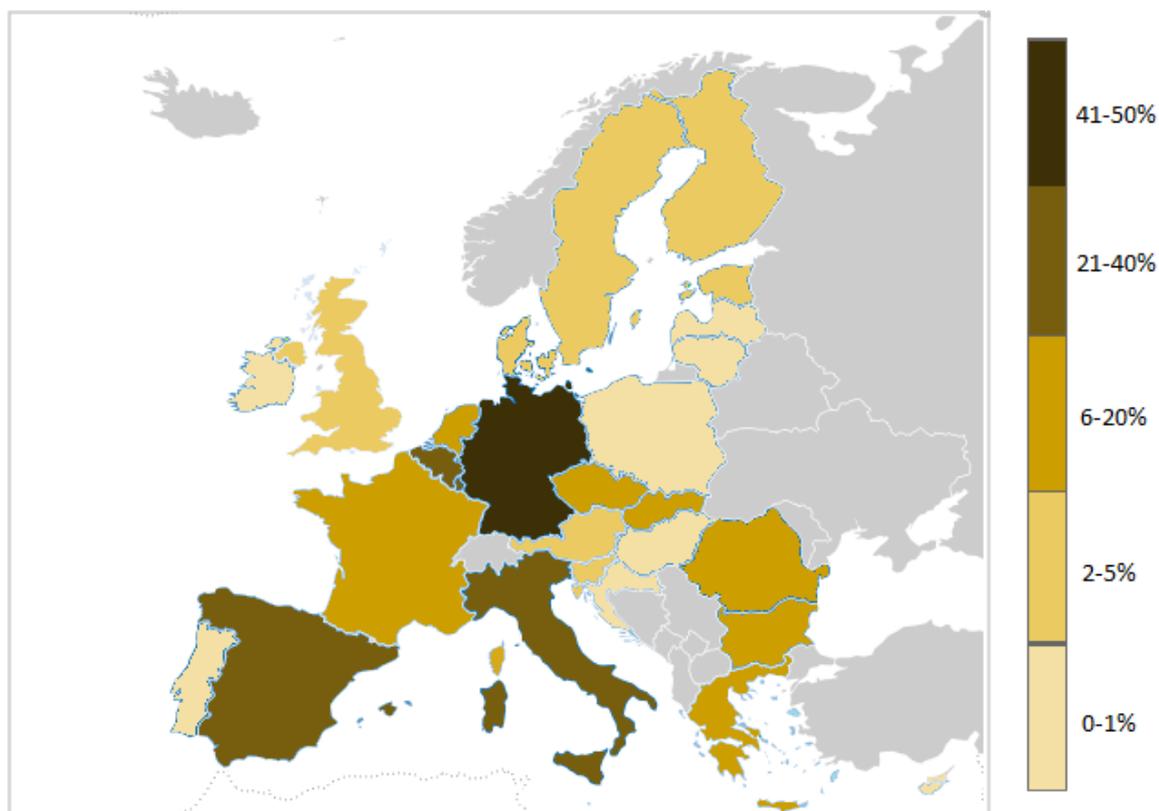


Notes: sourced from Pulla, Schuck, Verkerk, Lasserre, Marchetti and Green (2013), 92 p.

However, the **data in Figure 2 do not distinguish between public ownership at the national and at the sub-national level**. Drawing on various sources, among which the main is the European COST Action FP1201 ‘Forest land ownership changes in Europe: significance for management and policy’, in this work it is **estimated that sub-national level public authorities own almost 22 million hectares of forests, which are equivalent to 14% of the total EU forest area**.

Sub-national public ownership of forests characterises the continental and the southern parts of Europe (Figure 3). More precisely, **the highest share of sub-national public ownership of forests is found in Germany (48% of total forest area)**. Belgium (37%), Spain (37%), Luxembourg (34%) and Italy (24%) follow.

**Figure 3. Proportion of forest land in sub-national public ownership, by country**



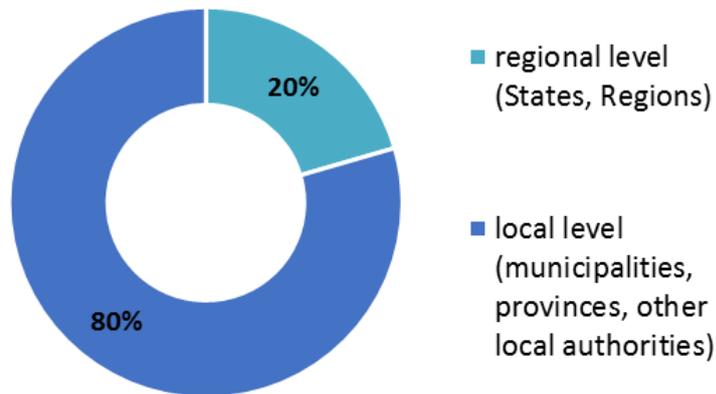
Notes: map elaborated by the authors; data are sourced from Živojinović *et al.* (2015), the Global Forest Resources Assessment 2015, FAO [website](#), and Syvicol (2014) for Luxembourg.

**In eight EU countries, LRAs have either no forest ownership (Croatia, Cyprus, Ireland, Lithuania and Malta) or a share of forest ownership which is below 1% of the total forest area (Hungary, Poland and Portugal).**

In terms of type of owners (Figure 4), at the sub-national level forests are **prevalently (80%) owned by local authorities** (municipalities, provinces, counties). Across the EU, local authorities own **some 17.4 million ha of forests**.

Public regional owners of forests (regions, states) are found only in six countries, namely Austria, Belgium, Germany, Italy, Spain, and Czech Republic. **Regional authorities own about 4.5 million ha of forests in the EU.**

**Figure 4. Sub-national forest ownership, by type of public authority**

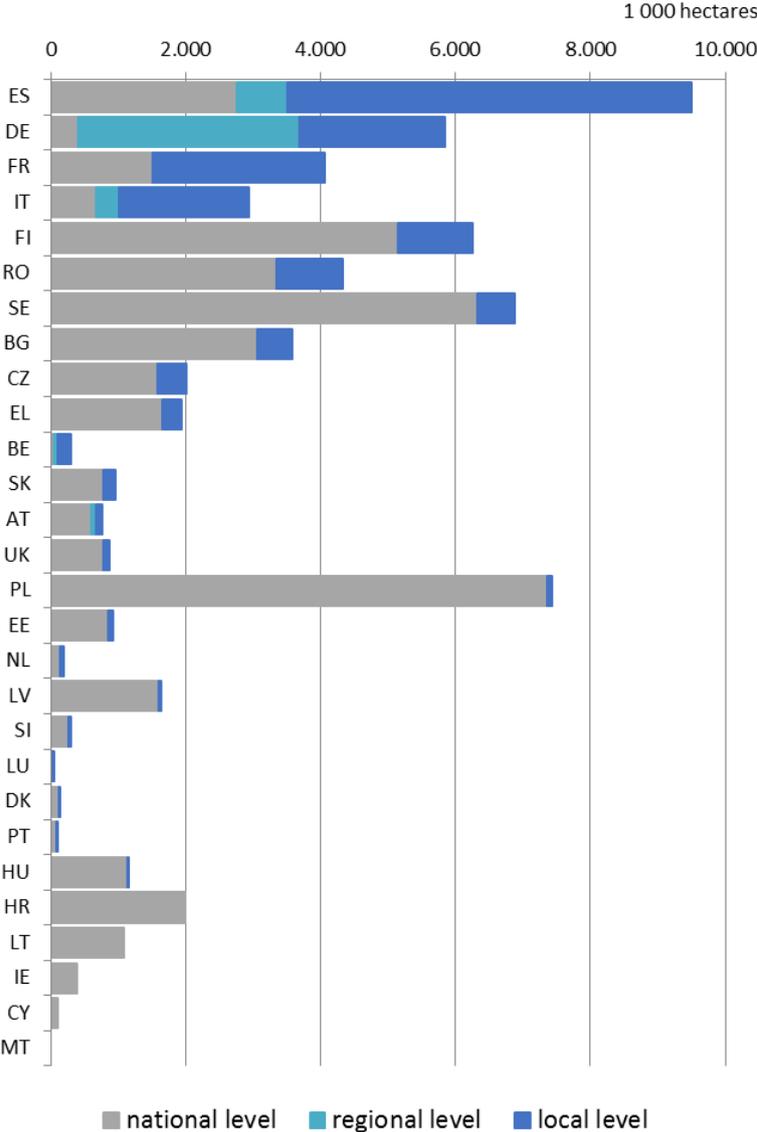


Notes: data are sourced from Živojinović *et al.* (2015), the Global Forest Resources Assessment 2015, [FAO website](#), and Syvicol (2014) for Luxembourg.

The detail of public ownership by country is presented in Figure 5. Figure 5 highlights the following:

- **Spain has the largest extension of forest area owned by LRAs (6.7 million ha).** It is followed by Germany (with over 5 million ha) and, at a distance, by France and Italy.
- **Spain also has the largest share of forests owned by local authorities.**
- **Germany has the largest share of forests owned by regional authorities (states).**
- Finland and Sweden have large extensions of forests but public ownership is limited to 28% and 25% of their total forest area, respectively, and ownership by LRAs is as low as 5% and 2% of their total forest area, respectively.
- Poland has high shares of public ownership of forests, but ownership is almost entirely at the national level.
- With almost 45 million ha of forests across the EU, public ownership at the national level largely prevails on ownership at the sub-national level.

**Figure 5. Forest area, by type of public authority (national, regional, local)**



Notes: data are sourced from Živojinović *et al.* (2015), the Global Forest Resources Assessment 2015, FAO [website](#), and Syvicol (2014) for Luxembourg. Countries are ordered by the extension of forest area owned by sub-national authorities.

Figure 6 summarises key estimates on public forests.

**Figure 6. Publicly owned forests: main estimates**

Forests under public ownership			
Public authorities at all levels		Local and regional public authorities	
1 000 hectares	share of total forest area	1 000 hectares	share of total forest area
65.054	40%	21.920	14%

# **Part 2 Implementation of the EU Forest Strategy and its impact at the local and regional level with examples**

The terms of reference of the study ask to collect by means of a questionnaire the most recent experience and expectations of local and regional authorities on the implementation of the EU Forest Strategy and its impact on the ground. Towards this scope, a consultation was designed and implemented online using LimeSurvey.

## **2.1 The online consultation**

The consultation was aimed at collecting the experience and opinion of European LRAs owning and/or managing forests across the EU. Consequently, in the first instance it was necessary to understand where and to what extent LRAs own forests. The analysis presented in Part 1 was the starting point of this exercise. According to its findings, LRAs to be targeted through the consultation were searched in 20 EU countries. The 8 Member States where LRAs own less than 1% of the country's forest area were not considered. The minimum number of public authorities to be targeted in each country was then defined proportionally to the size of the forest area owned by LRAs: the larger the area, the higher the number of authorities to be addressed by the consultation. Because of the specificity of the topic and the difficulty in identifying 'informed' invitees, problems in collecting a reasonable number of replies were expected from the very beginning and consequently, significant resources were deployed and countermeasures adopted.

The questionnaire was designed and implemented with the open source software 'LimeSurvey'. It was made available online at [www.forestrysurvey.eu](http://www.forestrysurvey.eu) and included 17 questions organised under three main sections: 'Implementation in your territory', 'Impact at the local and regional level', and 'Looking ahead'. Response time for completing the survey was estimated to be 15 minutes. Some of the questions were structured into sub-questions and all questions and sub-questions were based on the selection of pre-defined options.

With a view to gather the highest possible number of replies, the following was undertaken:

- Carefully selecting invitees. Extensive time was dedicated to the web search of LRAs owning and/or managing forests across the 20 selected

EU countries. Associations at the national and European level involved in the forest sector were also contacted to identify suitable invitees and to spread the news of the consultation.

- Enhancing accessibility. The questionnaire was translated and made available into five languages: English, French, German, Italian and Spanish. The English version of the questionnaire is enclosed as Annex II for information purposes.
- Widespread dissemination. At the beginning, the questionnaire was sent out through personal invitations to selected invitees only. In this way, more than 630 persons were sent an email with a personal link to the consultation. At a later stage, the survey was made publicly available online ([www.forestrysurvey.eu/open](http://www.forestrysurvey.eu/open)) and disseminated through interest groups such as relevant European associations, associations at the national and sub-national level, and consortia of research projects addressing the forest sector. In the case of the open version of the questionnaire, participation was possible if the respondent admitted, by selecting the appropriate options, to be a public local or regional authority owning and/or managing forests in a Member State.
- Increasing the number of persons selected for invitation. The number of invitations sent out was more than double the target usually set for this type of online survey.
- Extending the consultation's duration. Originally planned to run over the period 10 May – 8 June 2018, the closure of the consultation was postponed twice. The consultation finally closed on 18 June 2018.
- Providing continuous support. A contact address ([info@forestrysurvey.eu](mailto:info@forestrysurvey.eu)) was available to respondents or potential participants to communicate any issue, problem or requests for further information (such as the PDF copy of the questionnaire).

The above approach succeeded in having a reasonable number of questionnaires submitted online. Since all 17 questions were mandatory, it is believed that completed questionnaires came from respondents who were sufficiently motivated and informed.

## 2.2 LRAs owning and/or managing forests: profile of the sample participating in the consultation

A total of **70 questionnaires** were completed and submitted online, **40%** of which were from public authorities at the regional level (e.g. regions) and **60%** from public authorities at the local level (e.g. municipalities). By considering the total number of personal invitations which were sent out and the dissemination activities implemented, the rate of response is considered **low** (below 10%). Basic statistics of replies are summarised in Figure 7.

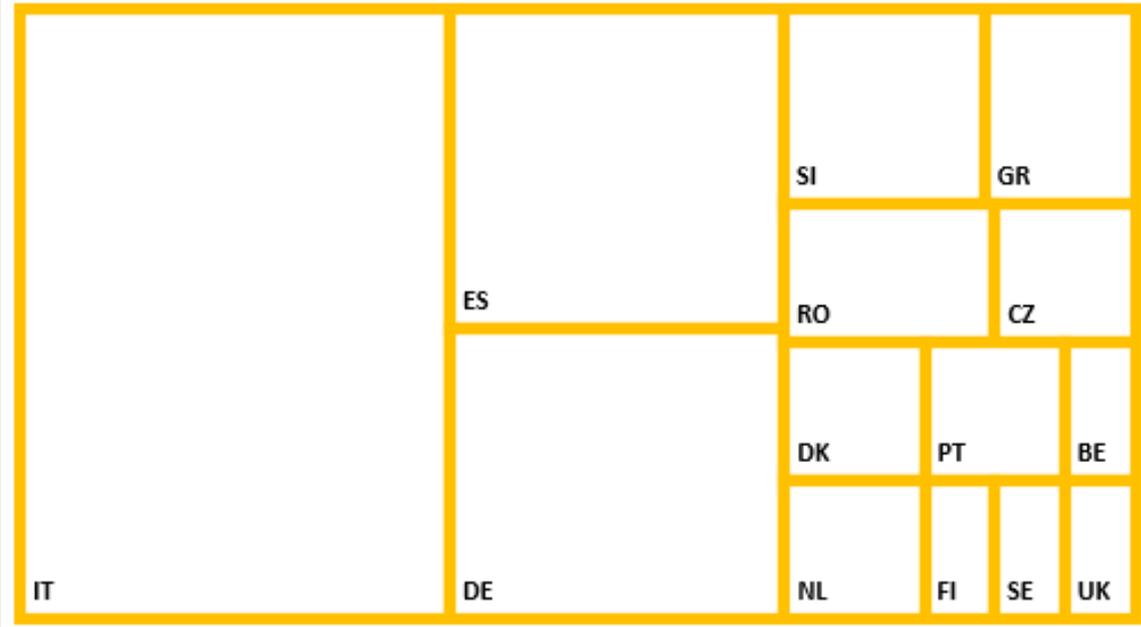
**Figure 7. Basic statistics of replies**

Accessing source	Submitted questionnaires	Local authorities	Regional authorities
Personal link - invited	58	34	24
Public link - open	12	8	4
<b>Total</b>	<b>70</b>	<b>42</b>	<b>28</b>

Replies were received from **14 EU countries**. The geographical origin of respondents is shown in Figure 8, where the area of the blocks is proportional to the number of replies received.

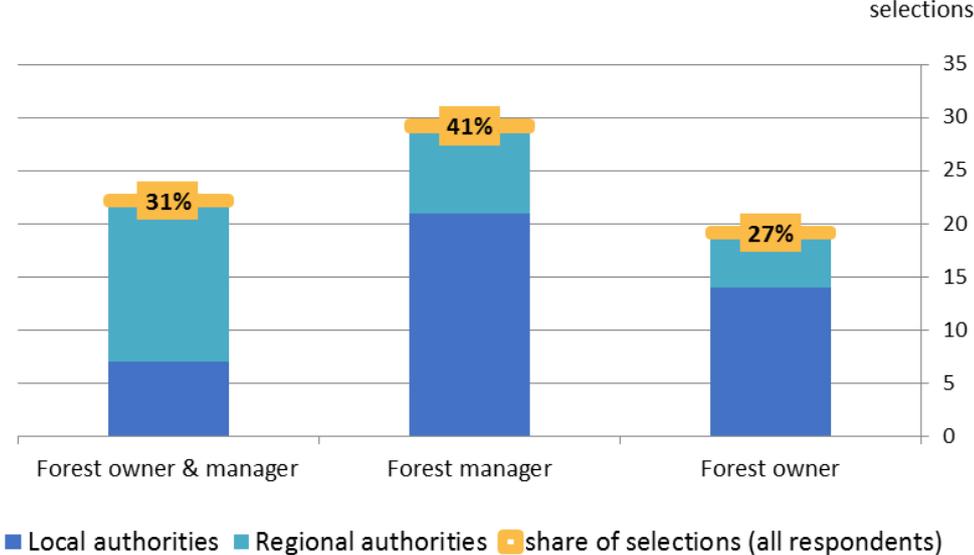
With respect to the relative importance of sub-national ownership of forests across the EU, in the group of respondents there is a good representation of Germany and Spain as well as of Romania, an over-representation of Italy, and the absence of France. The latter is unexpected considering that the questionnaire was also made available in French.

**Figure 8. Geographical origin of respondents**



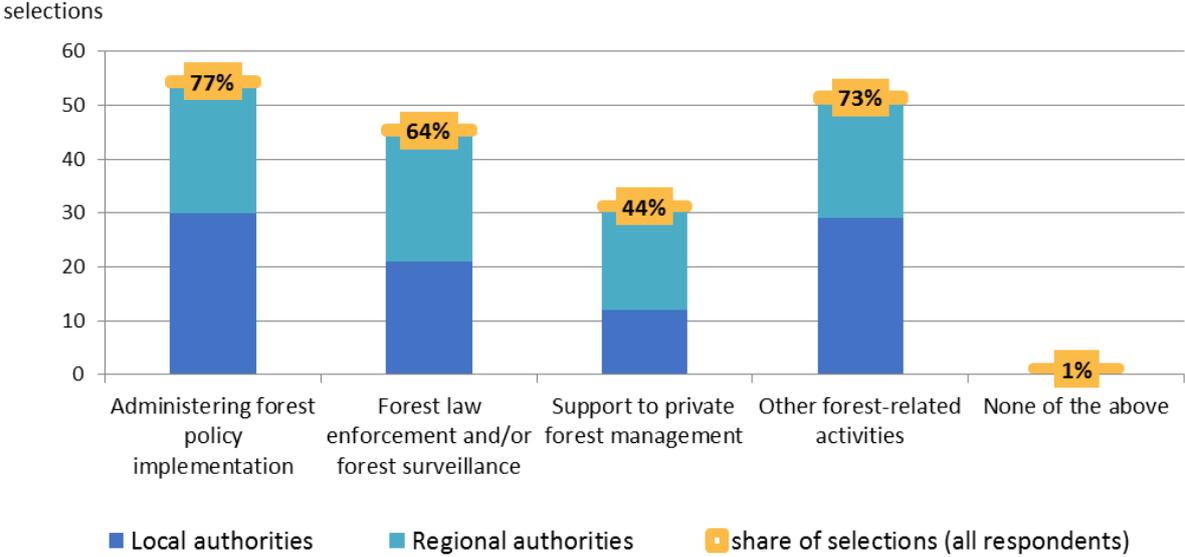
The majority (41%) of respondents belong to public entities that manage forests (Figure 9). They are followed by respondents from entities that own and manage forests (31%) and, last, by respondents from entities that only own forests (27%). The prevailing role differs between local and regional authorities. Among local authorities, half of them (50%) are forest managers. Within regional authorities, the ‘forest owner & manager’ category prevails (53% of the respondents from regional authorities).

**Figure 9. Role with respect to forests, by type of authority**



In terms of functions, 77% of the sub-national public authorities that took part in the consultation administer forest policy implementation and 64% enforce forest law and/or implement forest surveillance (Figure 10). These functions are common at both the local and regional level. Support to private forest management is performed by 44% of the respondents, with a prevalence of regional authorities. Apart from these administrative functions, most of the respondents (73%) implement ‘Other forest-related activities’ which include management tasks.

**Figure 10. Function of LRAs with respect to forests**



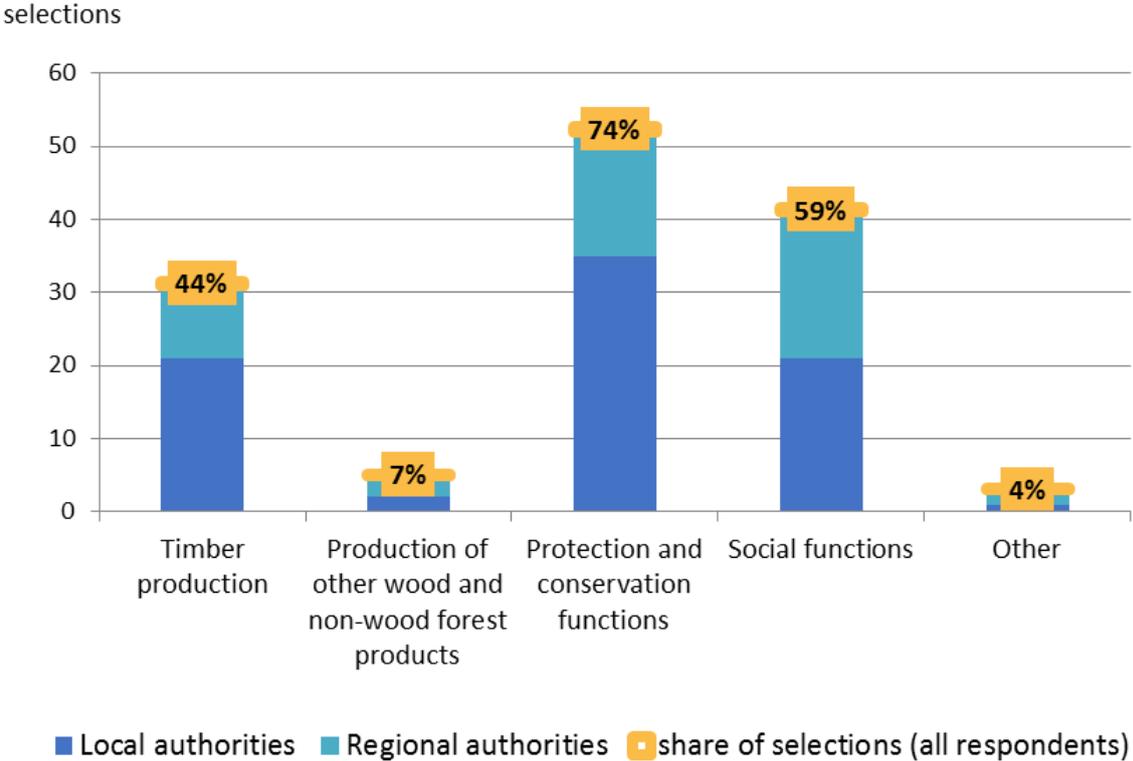
### 2.3 Implementation and impact at the local and regional level

This section reports on the implementation and impact of the EU Forest Strategy at the local and regional level according to the experience and opinion of the respondents expressed through the consultation. In addition, cases from five Member States are presented to show concrete interventions by LRAs in the forest sector. **These cases were sourced and selected via desk research and are independent from the online consultation and its participants.** In fact, in line with the applied data privacy policy, the analysis of replies provided in this report guarantees the anonymity of respondents.

**► Implementation**

The **main use of forests** (Figure 11) owned/managed by the belonging entities of the respondents is **protection and conservation** (74% of the selections). **Social functions of forests rank second (59%) and timber production third (44%).** These three uses appear to exhaust most of the selections (respondents were asked to select a maximum of the two most important uses). By distinguishing between local and regional authorities, protection and conservation functions were the most selected by local authorities (83% of their selections), while social functions were the most selected by regional authorities (71% of their selections).

**Figure 11. Uses of forests owned/managed by LRAs**



The case of the City of Vantaa, in Finland, is presented in Box 1 as an example of multifunctional use and sustainable management of forests. The case also highlights the potential of forests in urban contexts. Even if urban forestry is getting increasing attention as a way to complement traditional forestry, the discipline is considered rather complex as it implies, for example, resolving conflicts on land use, finding synergies and connectivity among sectors and actors, adapting to the rapid evolution of urban contexts, and finding the necessary resources in municipal budgets as benefits do not provide a tangible return to investments ([FAO webpage](#) on Urban and Peri-urban Forestry).

**Box 1. The multifunctional use and management of the urban forests of the city of Vantaa, Finland**

Framing conditions. Further to a comprehensive reform process of the sector, at the beginning of 2014 a series of new forest acts entered into force. Among the most relevant from the point of view of forest management are the ‘Forest Act’ and the ‘Forest Damages Prevention Act’. The new Forest Act has the double aim of making regulations clearer and less stringent on forest owners in the management of their properties. It fosters both the profitability of forestry as well as the enhancement of forest biodiversity. The Forest Damages Prevention Act regulates wood removals and related practices with

a view to prevent damages and keep forests healthy. An important change in this act with respect to its predecessor is that most of the field surveillance is replaced with operators' self-supervision. In 2015, the reform process also saw the adoption of a new National Forest Strategy 2015-2025 which is based on three strategic objectives: to create a competitive environment for forest businesses; to renew and diversify the sector; and to continue using forests according to Sustainable Forest Management (SFM) principles. Overall, both the strategic and the regulatory reforms are meant to accompany the changes the sector is expected to experience in the next decade, in particular in terms of diversification of *'forest-based business and activities, forest management and use, and welfare derived from the forest'* (Ministry of Agriculture and Forestry, 2015).

In Finland, private forest ownership and the production function of forests prevail. Still, socio-economic changes start favouring the emergence of groups, within the non-industrial private forest owners, which value more aesthetic and ecosystem services than wood production. According to a service-dominant logic, this implies that in the future the industrial production of timber and the related forestry services are expected to increasingly coexist with other uses and, correspondingly, new services. Such market developments also represent an opportunity for municipal forest owners, who own a minor share of the country's forest area, but who are found to favour a multifunctional forest management where importance is also given to non-wood economic benefits such as impact on human health, contribution to reach carbon neutrality targets, and reputational effects (i.e. image-building of the municipality).

The case. The city of Vantaa owns and manages 4,000 hectares of various types of forests. These forests are former agricultural areas or commercial forests which, over time, were purchased by the city from private landowners. Forests are managed according to multi-year management plans based on management principles set by the city. In addition, the municipality as well the forest-service providers the municipality relies on are committed to the PEFC (Programme for the Endorsement of Forest Certification) group certification. The forest management principles set in 2006 were at the basis of the city's forest management plan 2008-2017. The principles prepared in 2015 cover the period 2017-2030. The list of legislative acts which were taken into account in the preparation of these principles reflects the complexity of the process. These acts include: the Local Government Act, the Nature Conservation Act, the Land Use and Building Act, the Forest Act, the Forest Damages Prevention Act, the Act on Protecting Plant Health, the Act on Non Indigenous Species, the Act on Private Roads, the Act on Measuring

of Timber, the Antiquities Act, the Water Act, the Electric Market Act, the Consumer Safety Act, the Tort Liability Act, and the Waste Act.

The city **considers urban forest management necessary** for maintaining the landscape and cultural values, for preventing the spread of natural disasters (for example, through the regulation of storm water), and for limiting the stress, exacerbated by the proximity of urban contexts, caused on plants and trees by climate change. The objectives of management are to maintain forests' functions (namely, conservation, recreational use, and landscape), make them sustainable in time, and preserve as much biodiversity as possible. The commercial use of these 4,000 hectares is not foreseen but timber and logging residue deriving from management activities are annually sold by the city on the basis of tendering.

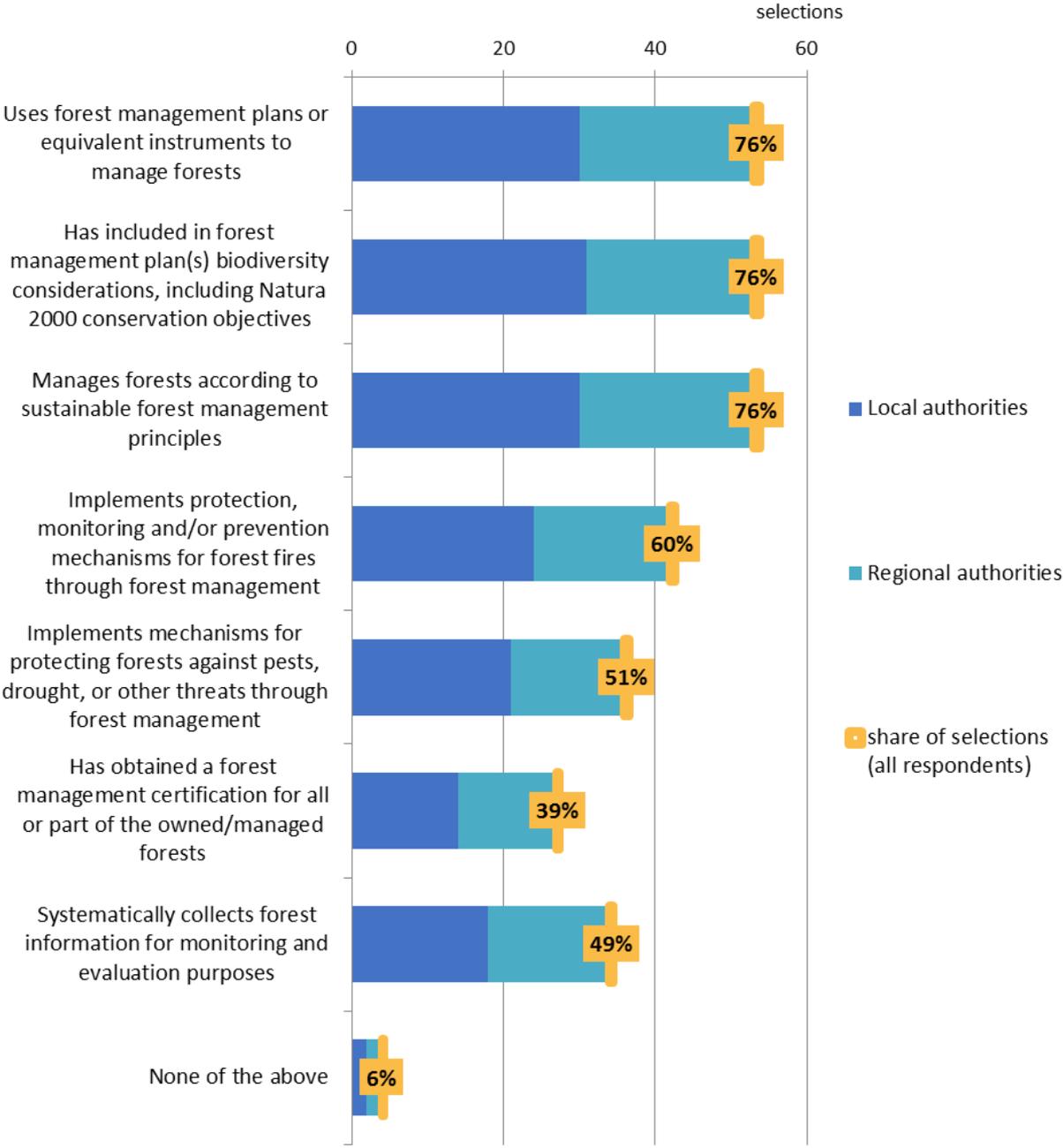
*Sources:* Ministry of Agriculture and Forestry [website](#); Ministry of Agriculture and Forestry (2015); City of Vantaa (2017); Häyrynen *et al.* (2015); Mattila *et al.* (2015).

With regard to **forest management practices** implemented by LRAs and according to the participants in the consultation, the use of management plans, the inclusion of biodiversity considerations in these plans, and the pursuit of sustainable forest management principles appear to be **common practices** as they are implemented in 76% of the cases (Figure 12). At the regional level, the shares of selections for the three practices (82%, 79%, and 82%, respectively) are higher than at the local level (71%, 74%, and 71%, respectively).

Less frequent is the obtainment of **forest certification** (39%). By type of authority, the obtainment of a certification represents the most evident difference between the regional and the local administrative levels. In fact, one-third (33%) of the respondents belonging to local authorities indicate that the forests managed/owned by their entities have obtained a certification, while this share **rises to 46% for respondents belonging to regional authorities**.

The systematic collection of forest information for monitoring and evaluation purposes is also more frequently practiced at the regional level (57%) than at the local level (43%), as is the implementation of mechanisms for protecting forests against pests, drought, or other threats through forest management (54% at the regional level and 50% at the local level).

**Figure 12. Forest management practices by LRAs**



There are multiple examples of local and regional authorities having obtained a forest certification. Certification is a way to support the sustainable mobilisation of wood, as it is expected to stimulate demand and develop markets for wood while adhering to sustainable management principles.

In the city of Riga, Latvia, certification is used to pursue a policy of commercial timber production and processing. Wood is harvested in the city’s forests located outside the urban boundaries and is then processed by an enterprise established by the city (Box 2).

## Box 2. Commercial exploitation of the municipal forests of Riga, Latvia

Framing conditions. According to Latvian Forest Policy (Latvijas meža politika) developed in 1998, sectorial reforms were undertaken in subsequent years. In particular, in 1999 there was the adoption of the Law on State Forest Service, and one year later, in 2000, the adoption of the Law on Forests. The Law on Forests, and its amendments, is the law defining the general requirements for forest management (for example, the development of a forest management plan for each forest property which must be revised every 20 years). The law is complemented by Cabinet of Ministers' regulations such as Regulation No. 935 'On Procedures for tree felling in forest lands' which regulates timber harvesting (2012), Regulation No. 88 'On Forest Inventory and State Forest Register' (2013), and Regulation No. 67 'On forest management plan' (2014). Other norms related to nature conservation regulate the environmental requirements applicable to forestry, so that, ultimately, forest management is regulated by more than 20 normative acts.

The case. The city of Riga is the forest owner of about 61,726 hectares of forest area. Over the time, properties were either granted to the city or purchased. Apart from urban forests which by law cannot be exploited primarily for timber production and where clear cutting is not allowed (there are 4,244 hectares of wooded land within the city's borders), the forests owned by the city of Riga near the capital and in the northern part of the country are used for timber production. Rīgas Meži Ltd. (LLC "Riga Forests") is **the commercial enterprise established by the city of Riga for the management of its forests** (as well as of its parks and gardens). In 2013, in order to add value to the timber resources of the city, Rīgas Meži launched its own sawmill whose processing capacity is of 50,000 m<sup>3</sup> of round timber per year (mainly small coniferous logs). This corresponds to about one-third of the volume harvested in the city's forests and comes primarily from forests which are within a 50 km distance from the mill and are well-connected to roads and ports. One-third of the products processed in the sawmill is sold on the local market while the rest is exported to the UK, Lithuania, United Arab Emirates and South Korea. Since 2012, the forest management of the company has been certified according to PEFC Forest Management certification standard. Timber tracking is ensured by PEFC Chain of Custody certification standard.

Sources: Rīgas Meži Ltd. [website](#); Jankovska *et al.*, 2014; Rendenieks, 2015; FSC, 2017.

Another example of certification is found in the Lombardia Region, Italy. This case describes about a comprehensive approach to forest management pursued

by the Regional Authority which, besides the obtainment of certification, facilitates the set-up of forest governance and shared management arrangements with other types of forest owners. In this way, the forests owned by the Lombardia Region are managed together with the forests owned by other public or private stakeholders, implying the mobilisation of wood from land that would have otherwise been left unmanaged or abandoned, and the management of forests according to sustainable principles (Box 3).

### **Box 3. Facilitating the sustainable shared management of forests through ‘forest contracts’, Lombardia Region, Italy**

Framing conditions. On 16 March 2018, a long-awaited national law for forests and forest value-chains was approved and published on 3 April 2018 (Legislative Decree N° 34). The new law reorders the existing norms and planning tools and mandates that these are coherent with the EU Forest Strategy, the commitments taken by the country at the EU level, and a national forest strategy to be approved by the national government. Among many other aspects, the law provides common definitions, valorises ecosystem services, and promotes the active management of forest resources, including those abandoned or excessively fragmented in terms of ownership, through association or partnering mechanisms. The law gives Regional Authorities ample possibilities for adapting its provisions to territorial characteristics and specific needs.

Since the early seventies, public forests owned by the state have been partially passed over to regions as part of a broader process of decentralisation. Over the years, regions have organised forests’ management according to different models, practices and regional laws. For example, in some cases new legal entities in charge of management tasks were created, while in others the management responsibility of forests was delegated to public bodies at lower administrative levels such as municipalities or provinces. Regional diversities and a variety of tools and authorities which had a say in the way forests were managed contributed to making the governance and planning structure of the sector rather complex.

The case. The Regional Authority of Lombardia owns 23,000 hectares of forests. Referred to as ‘The forests of Lombardia’ (20 in total), they are for the most part located over the Alps and represent a **cultural and natural asset to which the region is institutionally committed to manage and valorise**. The formal commitment dates back to 2004, when a [Charter of the Forests of Lombardia](#) was signed on the part of the region, as the owner of the forests, and of the Regional Entity for Services to Agriculture and

Forestry (ERSAF), as the manager of such resources. The Charter spells out forest management principles as well as a series of commitments covering a wide range of areas of intervention among which are protection, conservation, management, research, monitoring and cooperation activities. One of these commitments was the obtainment of forest management certification, which was achieved in 2009 according to both PEFC and FSC (Forest Stewardship Council) standards. Another commitment fostered the participation of community stakeholders such as local associations, municipalities, and forest businesses to development activities. This was achieved through the adoption of 'Forest Contracts'. These contracts are agreements signed for each forest by concerned stakeholders. They are meant to promote local partnerships, the implementation of common actions and programmes, and the sharing of vision and objectives among partners such as the economic development of the area and the sustainable use of the resources. They also emphasise the importance of communication and dissemination of information as a way to promote further participation and engagement. In 2017, eight Forest Contracts covering 20,000 ha of 'The forests of Lombardia' and 90,000 ha of other forests were in place. These contracts involve about 80 partners and have put in place projects for a total of EUR 8 million (Euromontana, 2017). The initiative of the Lombardia Region has been benefitting from the funding of diverse sources, among which are regional funds, EAFRD, LIFE, income from sales (e.g. of timber), and private investments. Among the lessons learnt over these years are: participatory management of forests meets both policy objectives and the demand civil society has over forest resources; participated processes require an appropriate type of governance; participated processes allow operating on larger scales and therefore mobilise projects which attract more resources and have higher chances of success (Euromontana, 2017).

*Sources:* ERSAF [website](#); Euromontana (2017); Masiero and Pettenella (2018); Vitariello (2013).

The case of the Provinces of Soria and Burgos, Spain, reports on a certification process which was pursued as part of a more comprehensive marketing strategy aimed at gaining competitiveness and adding value to local wood and timber products (Box 4). The case is presented as a good practice in a collection of Euromontana (2012).

#### **Box 4. The local pine wood branding initiative of the Provinces of Soria and Burgos, Castilla y León, Spain**

Framing conditions. On 20 July 2015, the Spanish Government approved a new forest law (Ley de Montes N° 21/2015) which replaced Law 43/2003 and its amendments made in 2006. Among the main aspects addressed by Law 21/2015 are: a) introduction of new concepts such as green infrastructures, environmental services, and multi-functionality of forests; b) variation/confirmation of competences and organisation; c) new classification of forests and provisions for their use; d) definition of forest management, forest certification and control of the legal origin of wood and wood products in compliance with EU Regulations; e) prohibition of use of burnt forest areas for 30 years; f) creation of a national registry of forest cooperatives, companies and industries; g) more severe fines for infractions; and h) definition of forest societies to encourage grouping of owners and the reaching of economies of scale. In Spain, Autonomous Communities have the responsibility for issuing regional legislation, in particular with regard to forest management and access to forest areas. On the other hand, most of the public forests are owned by local authorities. However, these forests also include public service forests whose management is a shared responsibility with the Autonomous Communities.

The case. Some 80% of the forests of Soria and Burgos are owned and managed by municipalities. Traditionally, these forests have been used for pine wood production: raw wood was processed locally, often into uneven final products, and then sold without following a marketing strategy. Starting from the eighties, locally produced pine wood suffered from the competition of wood coming from Scandinavia and Germany. This wood was quality controlled and was marketed in a more attractive way. To remedy the poor reputation of the local wood, it was decided to develop and register a brand which would guarantee the origin of wood, the sustainability of forests sourcing the wood, and the quality of the products obtained. The ‘Pino Soria Burgos’ brand started being implemented in 2004 by a regional centre, Cesefor, whose foundation was promoted by the regional government of Castilla y León. It took one and a half years to complete the process with the registration of the brand. Basically, the main steps of the process were to: (1) consult locally with the timber industry as well as public and private forest owners to identify the underlying problems; (2) outline the criteria to be adhered to by the actors along the value chain, from wood producers to wood processors; and (3) define the way concerned stakeholders could practically meet these criteria. Municipal forest owners reacted well to the branding initiative and obtained the PEFC certification rather easily. Adherence to the

criteria by private forest owners and local sawmills was more challenging.

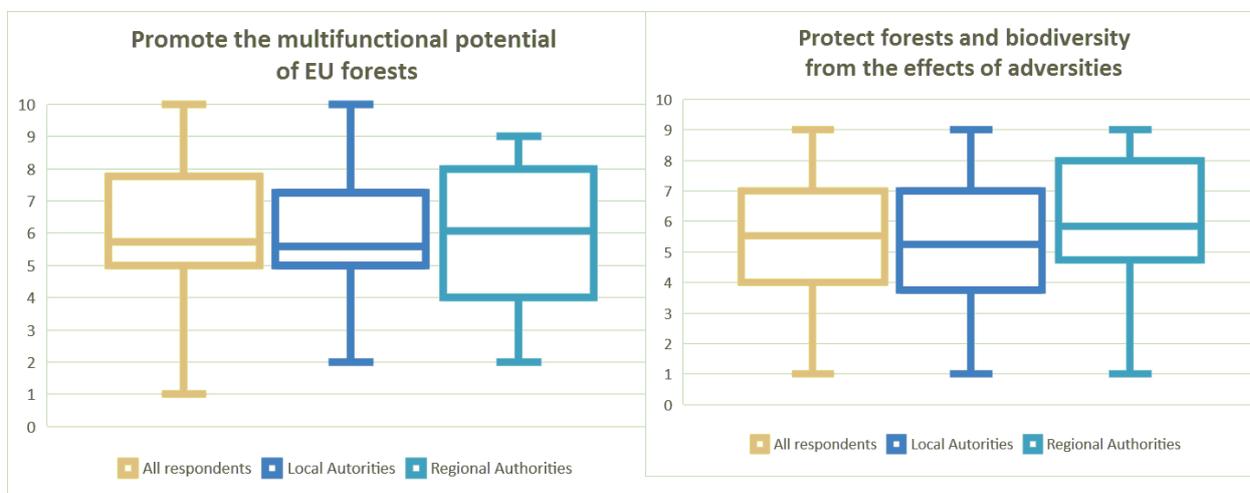
To date, Cesefor still manages the Pino Soria Burgos brand which applies to pine wood produced in an area of 104,000 hectares extending over the provinces of Soria and Burgos in Castilla y León and Logroño in La Rioja. Since January 2018, Cesefor has been governed by a Board upon which the Provincial Council of Soria, the University of Valladolid, and the regional association of forest owners FAFCYLE are seated. The initiative managed to introduce PEFC certification and traceability of wood as well as standardization of processed wood. Initially the volumes sold using the brand increased significantly (from 4,000 m<sup>3</sup> in 2004 to 80,000 m<sup>3</sup> three years later) but then volumes became stable as emphasis was put on consolidation, stability of the industry and image-building.

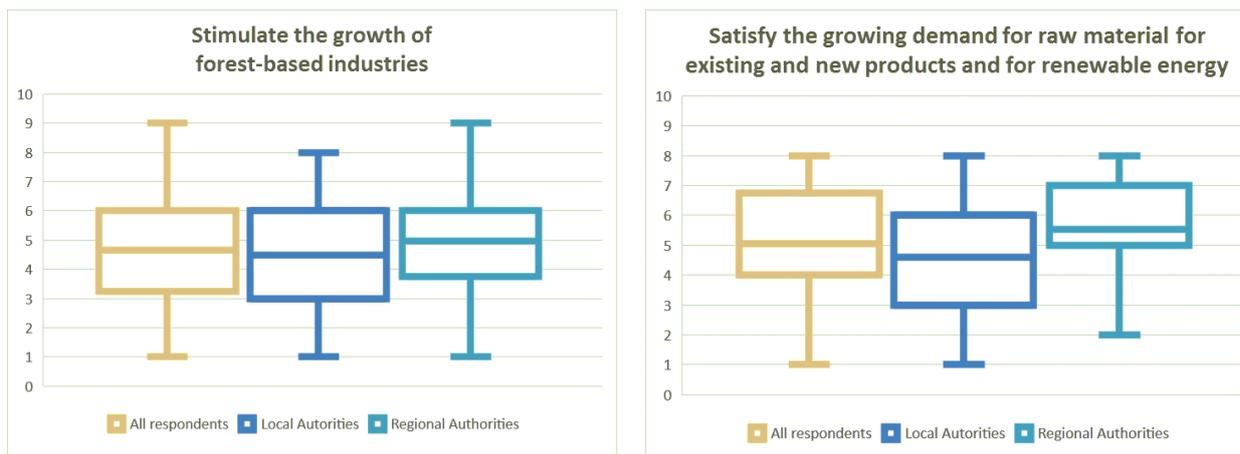
Sources: Ley N° 21/2015, Agencia Estatal, Boletín Oficial del Estado [website](#); Cesefor [website](#); Euromontana (2012); Junta de Castilla y León [website](#).

## ► **Impact**

On average and according to the opinion and experience of the respondents, the EU Forest Strategy has so far **progressed rather unsatisfactorily** towards the promotion of multifunctional forests, the meeting of increasing demand for raw wood, the growth of forest-based industries, and the protection of forests and biodiversity from the effects of adversities. Figure 13 shows the range (maximum and minimum) of the scores given with respect to these different aspects, as well as the averages (represented by the horizontal line into the box), on a scale from 1 to 10. All average scores are below 6.

**Figure 13. Assessment of the contribution of the EU Forest Strategy to main objectives**

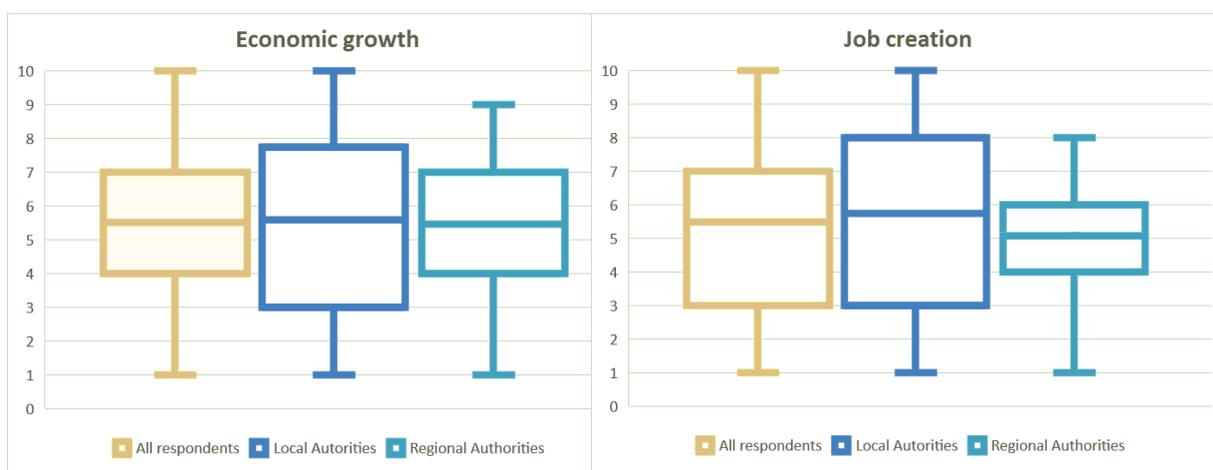


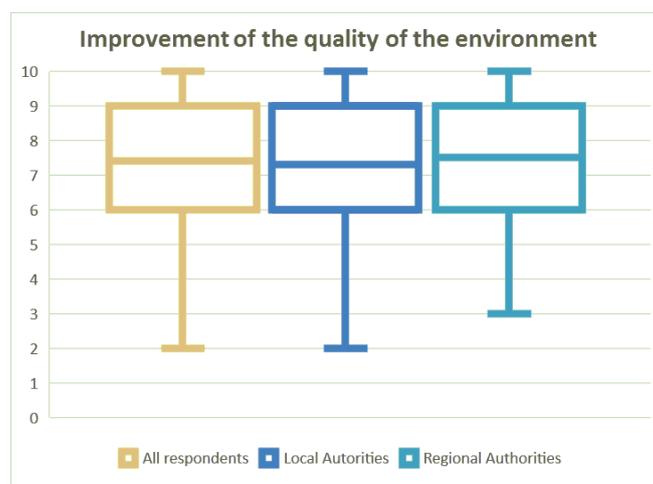
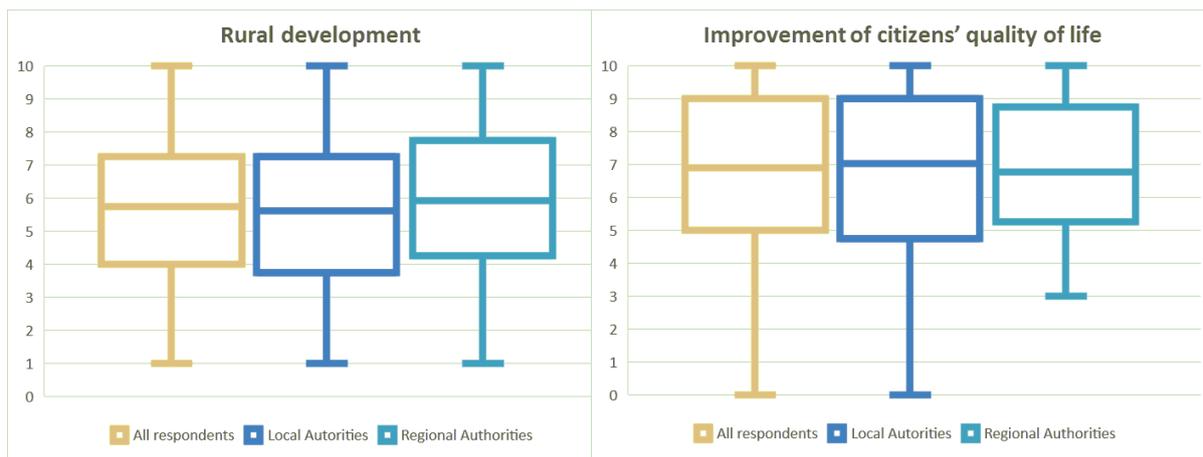


The worst average score (4.8) relates to the assessment of the contribution of the EU Forest Strategy to the growth of forest-based industries. The second worst average score (5.0) relates to the satisfaction of the growing demand for raw material for existing and new products as well as for renewable energy. In general, it is noted that local authorities' averages are lower than those of regional authorities.

Respondents **have a slightly more positive perception of the impact forests and their management have at the territorial level** (Figure 14). However, according to their opinion and experience, the **contribution to economic growth (average score of 5.7 on a scale from 1 to 10), job creation (average 5.5) and rural development (average 5.8) is still unsatisfactory.**

**Figure 14. Assessment of the contribution of forests and of their management at the territorial level**





Instead, a positive assessment is given to the impact forests and their management have in improving citizens' quality of life (average score of 7.0) and the quality of the environment (average 7.4). There are not many differences between local and regional authorities' replies on the impact at the territorial level, and actually local authorities are more positive than regional authorities on their assessment of the forest sector's impact on job creation.

The example of the municipality of Kočevje, Slovenia, describes a local development strategy which is focussed on the wood sector and which managed to revitalise the wood processing industry at the local as well as at the regional level (Box 5).

**Box 5. Wood and forests at the core of the development of the municipality of Kočevje, Slovenia**

Framing conditions. The National Farm Land and Forest Fund Act of 1993 made forests the property of the Republic of Slovenia and established the Slovenia Forest Service (SFS). Up to the end of June 2016, SFS performed

public forestry services in all Slovenian forests, regardless of their ownership status, but state forests' management was the prerogative of 14 forest holdings which were given 20-year concessions. Since July 2016, upon the expiry of these concessions, a new government-owned company (*Slovenski državni gozdovi d.o.o.* - SiDG), established by law (Law No. 9/16 of 12.2.2016 on the management of forests owned by the Republic of Slovenia), was given the management responsibility of state forests. However, forest operations may still be contracted out on the basis of tenders (Eustafor press releases of [27/10/16](#) and [01/06/2017](#)) and concessions on use may still be made. The main legislative piece for the sector is the 1993 Forest Act and its amendments as well as its references to the 1999 Nature Conservation Act, the 2013 Law on Real Estate Tax, and the 2016 Law on the Management of State Forests. The Forest Act makes provisions for a National Forest Programme which shapes the national policy for the sector and which was adopted in November 2007.

The case. The municipality of Kočevje has been recently awarded the 2018 Golden Rock as the Slovenian town which has made the greatest progress in development. Apart from a recent decision by a Japanese investor to locate a plant producing robots in Kočevje, the wood sector is at the core of the city's development strategy. In 2015, the city established a municipal company called Kočevski Les which was given the concession over 4,000 hectares of woodland. The company's regional wood processing centre is mentioned as a good practice related to the creation of forest-based value chains in the national 'Roadmap towards the circular economy in Slovenia' (2018). In an interview, the mayor of Kočevje specifies that the company '*oversees all the wood processing activities for over 25000 cubic meters of wood per year. This means that Kočevski Les is in charge of the whole wood production process, which currently employs 30 people and we hope to double that number next year*' (The Slovenia Times, [interview of 11 Apr 2017](#)). In fact, the centre not only has created direct jobs but has also revitalised the regional wood processing industry which started declining, following a common pattern country-wide, in the early nineties, after independence. As a consequence of this crisis, major companies in the sector closed down and the country started exporting round logs rather than processing and adding in-country value to the raw material. Kočevski Les has taken up a connectivity role among the companies operating in the forestry wood chain, supplying them with domestic wood or purchasing wood from them (RTV-SLO, [news of 21. February 2017](#)). As a result, new companies are being established, new jobs are being created and new interest in carpentry is being raised among young people.

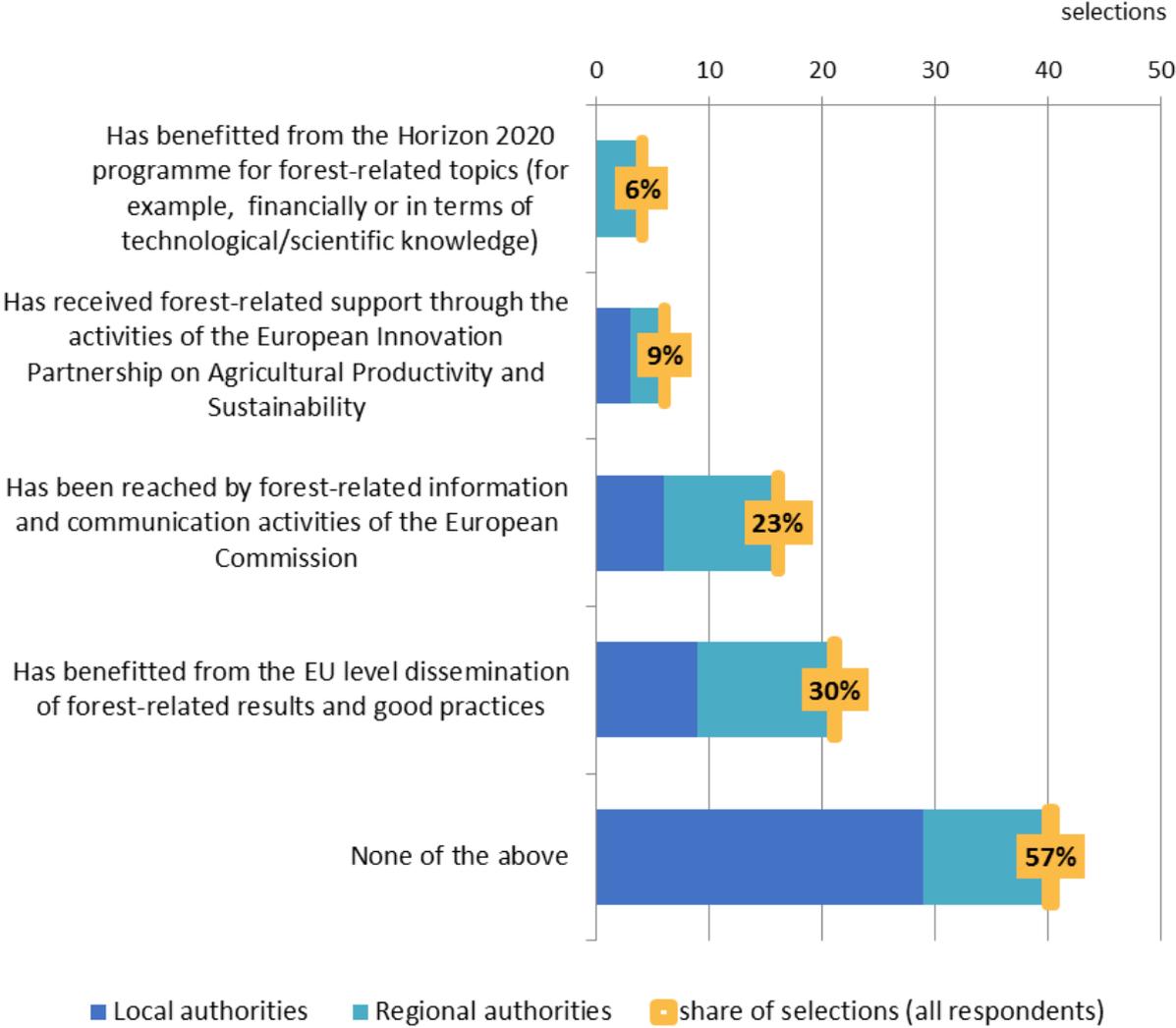
The municipality also shows commitment to the protection and conservation of forest habitats. Located in a forested area of Slovenia which is acknowledged to be one of the most naturally preserved (the whole Kočevska area is defined as a Natura 2000 site under the Birds Directive and the Habitats Directive), in 2014, the Municipality of Kočevje was awarded the LIFE project “*Conservation of Natura 2000 sites Kočevsko*” (2014-2019). According to the project’s website ‘*The project represents an upgrade to the existing system management Natura 2000 sites Kočevsko and will serve as an example of successful management of Natura 2000 sites in Slovenia, as well as in the wider Dinara region*’.

Sources: Ministry of the Environment and Spatial Planning of the Republic of Slovenia (2018); Slovenia Legal Information System [PIS](#); LIFE Kočevsko [website](#).

The **impact of the EU Forest Strategy in terms of engagement** of stakeholders at the local and regional level **is modest** (Figure 15) with regional authorities that are evidently more engaged than local authorities in forest-related activities promoted or implemented by the EC.

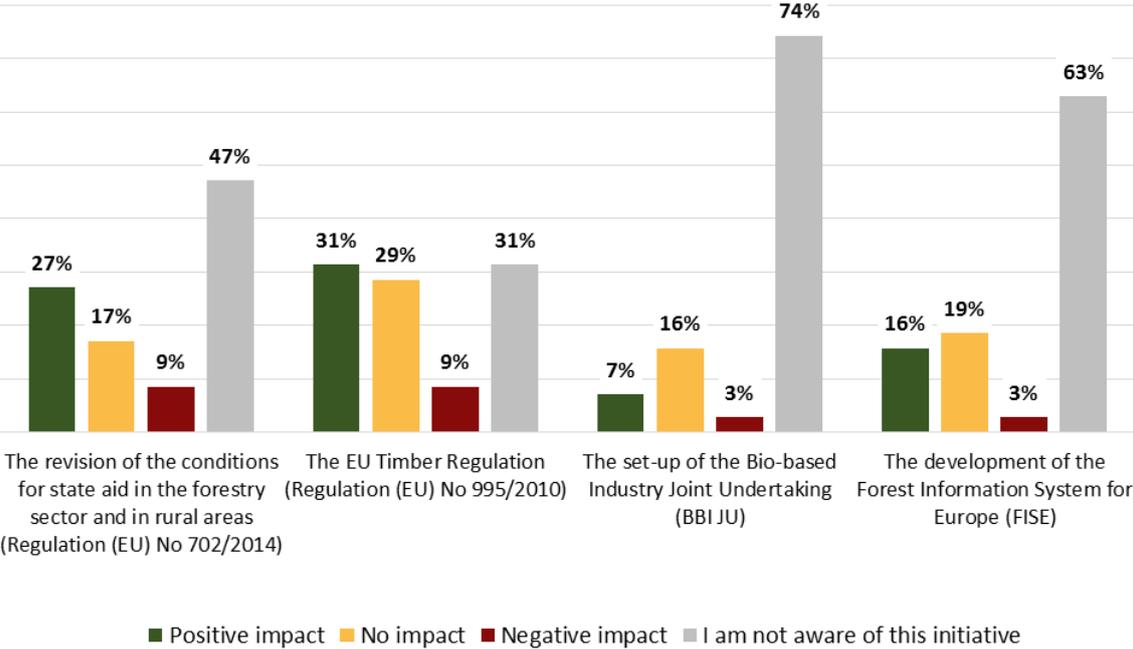
**More than two-thirds of the respondents state that their entity has not benefitted from general engagement activities** such as the EU level dissemination of forest-related results and good practices (70%) or forest-related information and communication activities of the EC (77%). Only a minor share of the respondents state that their entity was engaged in more specific activities such as those provided through the European Innovation Partnership on Agricultural Productivity and Sustainability (9%) and H2020 (6%). Among the respondents, only regional authorities were somehow engaged in H2020.

**Figure 15. Impact of the EU Forest Strategy in terms of engagement of LRAs**



With regard to **specific initiatives of the EC**, the most relevant result relates to the **lack of awareness of respondents**. For each of the four initiatives proposed in the questionnaire, the ‘I am not aware of this initiative’ option is the most selected (Figure 16). The Bio-based Industry Joint Undertaking is the least known initiative (74% of the respondents are not aware of it) among the four, closely followed by the Forest Information System for Europe (63% of the respondents are not aware of it). Opinions on the impact of the EU Timber Regulation are the most controversial as 31% of the respondents find it to have a positive impact on the forest-related activities of their entities but more respondents find it to have no (29%) or even a negative (9%) impact.

**Figure 16. Impact of EC initiatives on forest-related activities at local and regional level**



## Part 3 Funding

Possibly as a side-effect of the forest sector's linkages with several policy areas, EU funding for forests comes from multiple sources. This section provides an overview of the main funding sources, including a gross quantification of the planned allocations for forests under the European Agricultural Fund for Rural Development (EAFRD), and an estimate of the amounts committed or disbursed for forest-related projects under the programmes directly managed by the EC. This analysis is complemented by the presentation of the results of the online consultation in terms of experience and opinion of the respondents with respect to the funding of the sector.

### 3.1 Forest funding through the European Agricultural Fund for Rural Development

EU funding for the forest sector comes mainly from the EAFRD. As part of their rural development programmes (RDPs), Member States and regions have decided on the measures and sub-measures to be implemented over the 2014-2020 programming period and on the size of their financing. In the RDPs, Measure 8 (M8) and Measure 15 (M15) referring to Articles 21-26 and 34, respectively, of Regulation (EU) No 1305/2013, are dedicated to support the forest sector. Figure 17 details these measures and the corresponding planned allocations. **Overall, some EUR 7.1 billion have been earmarked to the forest sector through M8 and M15 at the EU28 level.** The EU contributes almost EUR 4.8 billion of this total, or 67%, the rest being national co-financing.

**Figure 17. Allocation to EU forestry measures M8 and M15 in the RDPs, 2014-2020**

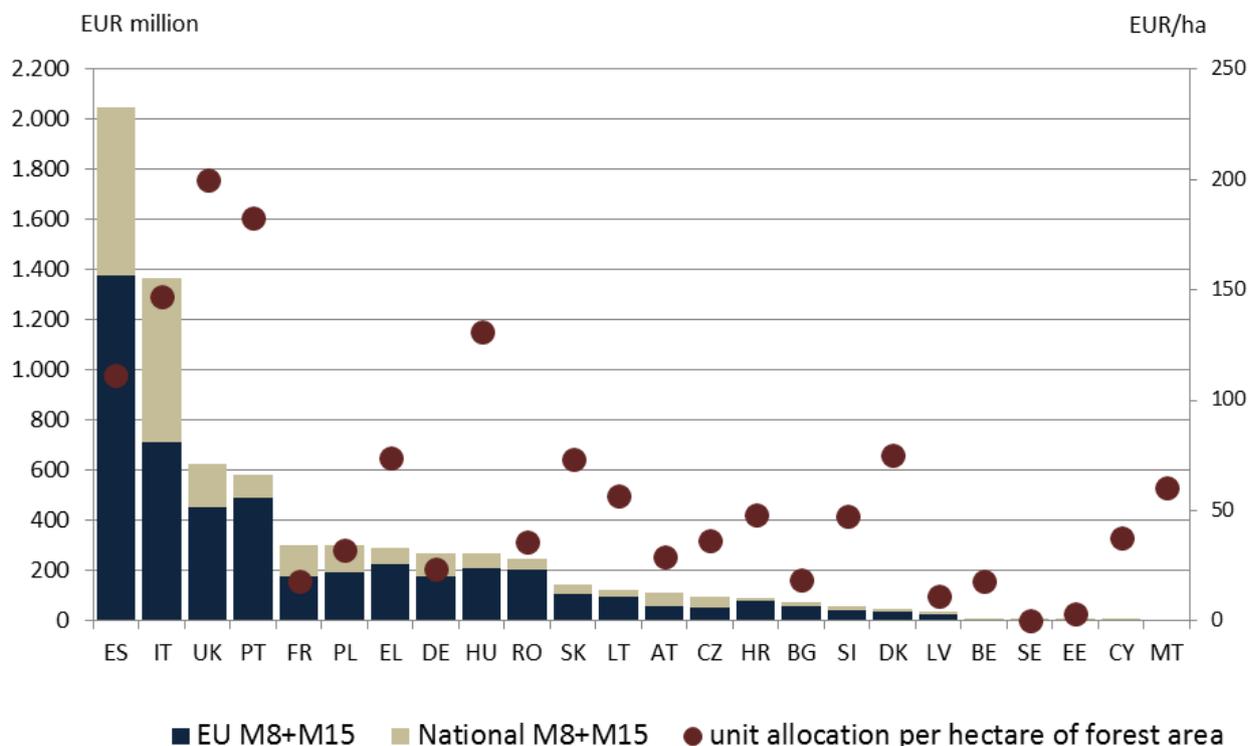
Measure	Sub-measures	EUR million
M8. Investments in forest area development and improvement of the viability of forests	8.1 Afforestation/creation of woodland	6,804 (out of which 4,528 of EU funding)
	8.2 Establishment and maintenance of agro-forestry systems	
	8.3 Prevention of damage to forests from forest fires and natural disasters and catastrophic events	
	8.4 Restoration of damage to forests from forest fires and natural disasters and catastrophic events	
	8.5 Investments improving the resilience and environmental value of forest ecosystems	
	8.6 Investments in forestry technologies and in processing, mobilising and marketing of forest products	
M15. Forest-environmental and climate services and forest conservation	15.1 Payment for forest-environmental and climate commitments	328 (out of which 239 of EU funding)
	15.2 Conservation and promotion of forest genetic resources	

Notes: ESIF data online, accessed on May 2018

Figure 18 shows the planned allocations by country for M8+M15, distinguishing between EU and national co-funding. The chart also visualises the average allocation per hectare (red dot) which is calculated by dividing, in each country, the total funds allocated to M8 and M15 by the total forest area. This unit spending varies greatly across the EU, from as high as 200 EUR per hectare in the UK to less than 1 EUR per hectare in Sweden.

Under the two measures, the largest allocations are planned in Spain, Italy, UK and Portugal. Proportionally to the forest area, these countries also show amongst the highest unit rates of funding per hectare of forest area. Amongst the other EU countries, only Hungary has comparable unit values.

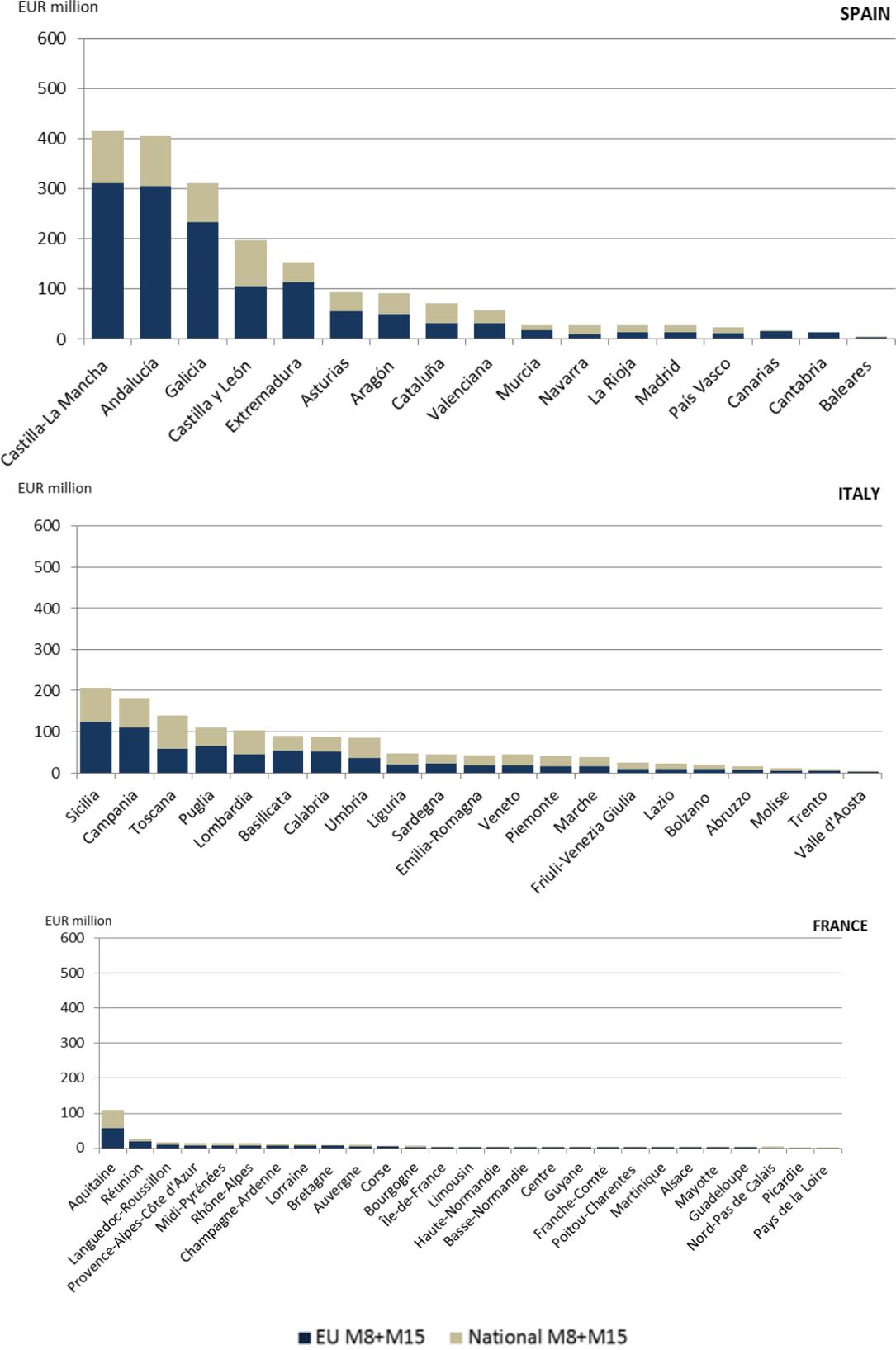
**Figure 18. RDPs' planned allocation to M8 and M15, by country, 2014-2020**



Notes: ESIF data online, accessed on May 2018. Finland, Ireland, Luxembourg and the Netherlands do not allocate funds in their RDPs to M8 and M15.

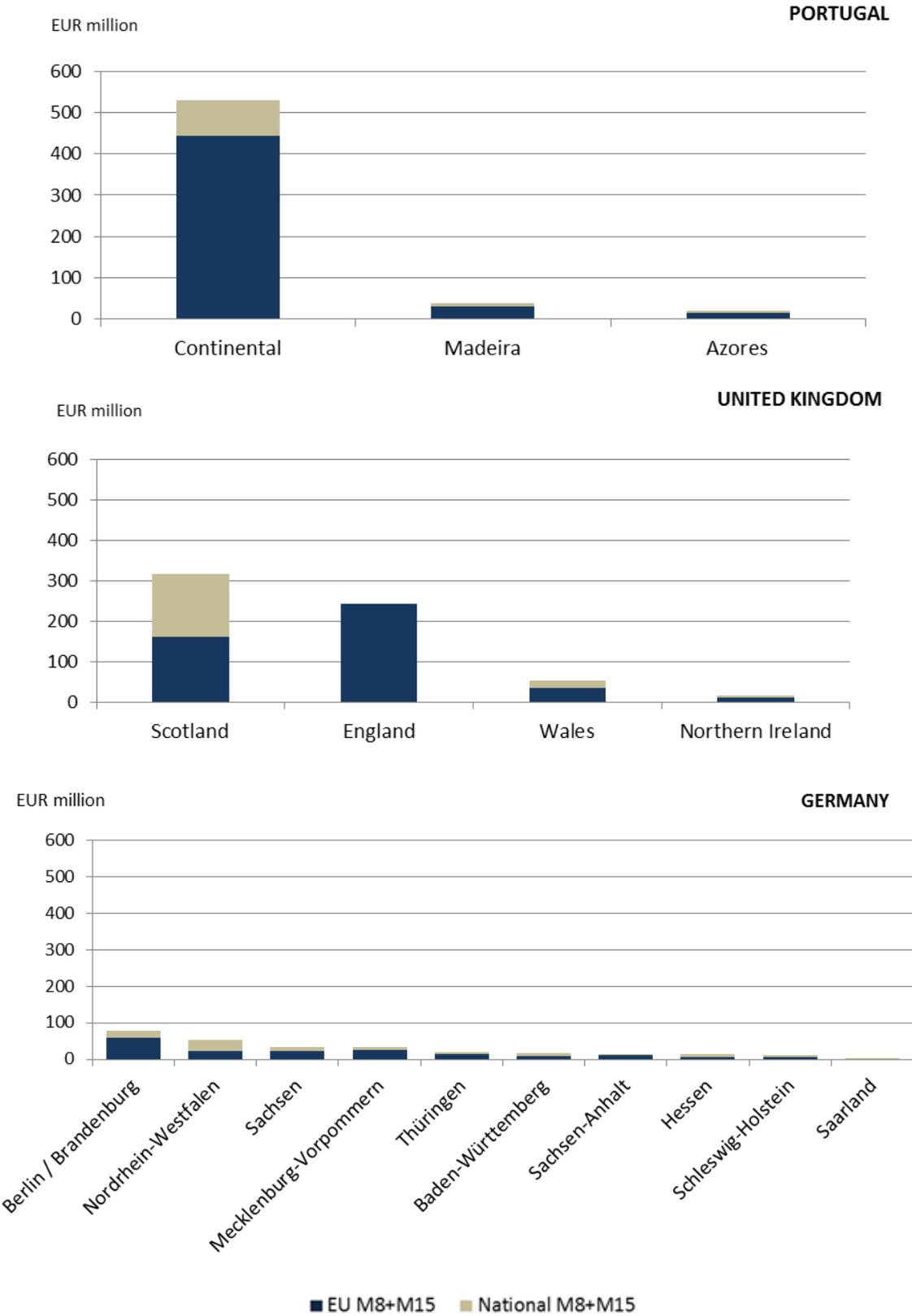
Figures 19 and 20 show the EU and national co-funding for M8 and M15 planned at the sub-national level (NUTS2 and NUTS1, respectively) for those countries having presented sub-national RDPs. At NUTS2 level, the highest allocations are found in Spain and the lowest in France. At NUTS1 level, continental Portugal makes the highest allocation of funds. The scale of both figures has been kept the same so that charts are all comparable one to each other.

**Figure 19. RDPs' planned allocation to M8 and M15, NUTS2 level, 2014-2020**



Notes: ESIF data online, accessed on May 2018.

**Figure 20. RDPs' planned allocation to M8 and M15, NUTS1 level, 2014-2020**

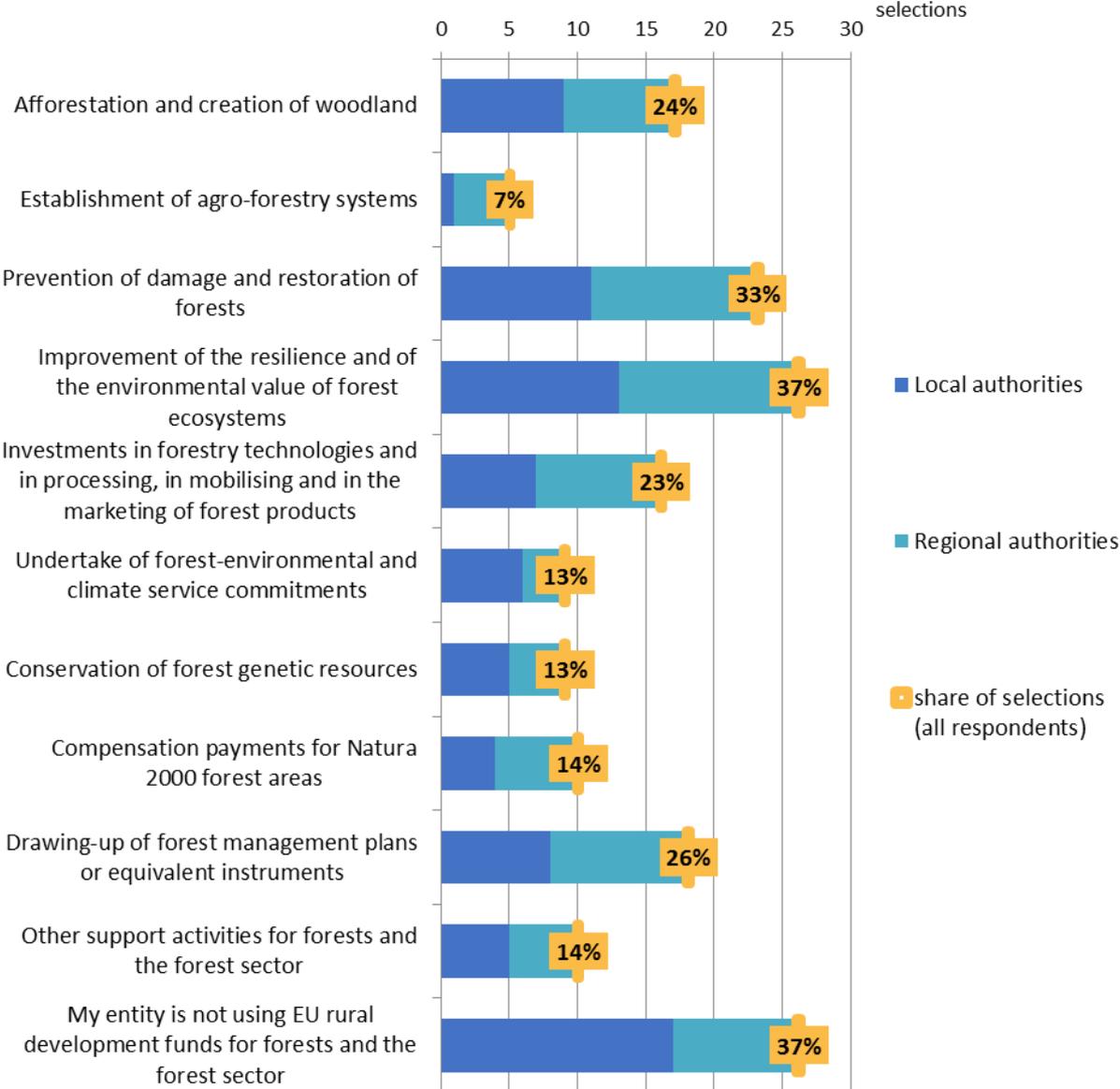


Notes: ESIF data online, accessed on May 2018.

Additional support to the forest sector, which is not precisely quantifiable, is provided through Measures 1, 2, 4, 7, 9, 10, 12 and 16 of the RDPs (for example, sub-measure 12.2 is for ‘compensation payment for Natura 2000 forest areas’, while sub-measure 16.8 supports the ‘drawing up of forest management plans or equivalent instruments’), as well as other measures under Regulation (EU) No 1307/2013 on direct payments (for example, greening measures) (EC-DG AGRI, 2017).

EAFRD support does not benefit all LRAs. According to the online consultation, 37% of the respondents state that their entity **does not use EU rural development funds** from the EAFRD for their forests (Figure 21).

**Figure 21. Implemented sub-measures of rural development programmes**



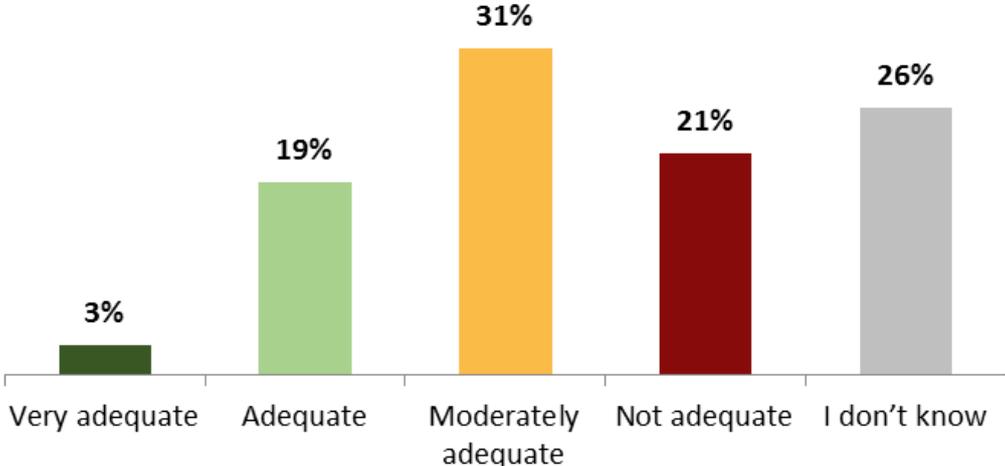
All these respondents but two indicated other sources of funding for forest-related activities, namely local and regional budgets. The share of those not using EAFRD is slightly higher for local authorities (40%) than for regional authorities (32%).

For those entities using rural development funds, the most commonly implemented sub-measures for forests are under Measure 8 ‘Investments in forest area development and improvement of the viability of forests’. In particular, they relate to the improvement of the resilience and of the environmental value of forest ecosystems (37% of the selections), and to the prevention of damage and restoration of forests (33% of the selections). The ‘drawing-up of forest management plans or equivalent instruments’, falling under Measure 16 ‘Cooperation’ of the RDPs, is the third most selected sub-measure (26%) by respondents.

Sub-measures under Measure 15 ‘Forest-environmental and climate services and forest conservation’ do not appear to be very popular among respondents as the undertaking of forest-environmental and climate service commitments, and the conservation of forest genetic resources have rather low shares of selections (13% each). This information is in line with financial data on M8 and M15 that indicate at the EU level an overall allocation of almost EUR 6.8 billion to Measure 8 and of only EUR 350 million to Measure 15 (several EU countries did not allocate funds to M15 in their RDPs).

**Opinions in terms of adequacy of the existing measures funded from the EAFRD** for the promotion of sustainable forest management at the territorial level are shown in Figure 22.

**Figure 22. Opinions on the adequacy of RDP forest-related measures**



Prevailing opinions (53%) point to a moderate adequacy or adequacy ('Very adequate', 'adequate' and 'moderately adequate') of measures. In addition, there is one-fourth of the respondents (26%) who do not have an opinion and who belong mostly (89%) to local authorities.

### 3.2 Supporting the forest sector through other sources

**Several other sources, besides the EAFRD, may support forest-related activities.** EU funding for the forest sector comes from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and, for the entitled MS, the Cohesion Fund (CF). It is also sourced through territorial cooperation and the programmes directly managed by the EC. The availability and use of EU funds is prioritised and guided by the operational programmes and the RDPs prepared in individual countries. Box 6 shows the example of Croatia, according to a guide prepared by a national organisation.

#### **Box 6. The 'Guide to EU funds for the forestry sector' in Croatia**

In order to benefit from EU funding from the European Structural and Investment Funds (ESIF), Croatia prepared three Operational Programmes and one Rural Development Programme for the period 2014-2020. In 2015, the Croatian Chamber of Forestry and Wood Technology Engineers published a guide to **EU funding for the forest sector** which highlighted the following sources:

- Operational Programme Competitiveness and Cohesion 2014-2020, specific objectives 'Demining, restoration and protection of forests and forest land in protected and Natura 2000 areas; 'SMEs' development and growth improved in domestic and foreign markets'; 'SMEs innovativeness enhanced'; 'Increasing energy efficiency and use of RES in manufacturing industries'; 'Increased R&D capacities of R&D sector to perform excellent research and to serve the needs of economy'.
- Operational Programme Efficient Human Resources 2014-2020.
- Rural Development Programme of the Republic of Croatia for the period 2014-2020, measures M01, M02, M04, M06 and M08.
- European Territorial Cooperation, including: Cross-border cooperation (Programme Italy-Croatia, Programme Hungary-Croatia, Programme Slovenia-Croatia, Instrument for Pre-Accession Assistance), Trans-national cooperation (Mediterranean Programme, Danube Programme,

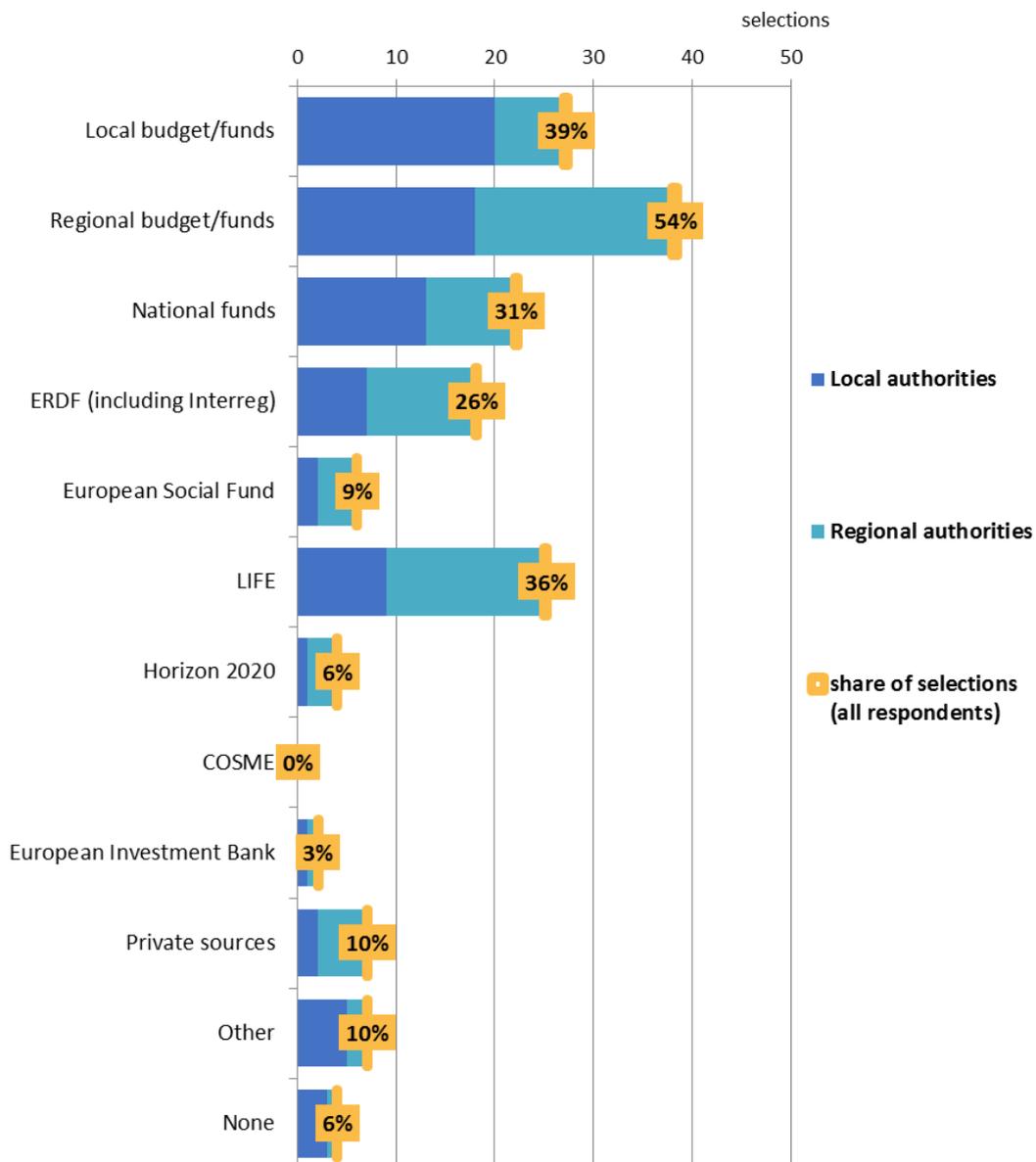
ADRION - Adriatic Ionian Programme, Central Europe Programme), Interregional cooperation (INTERREG VC, ESPON).

- EU programmes directly managed by the Commission (LIFE, H2020, Erasmus for young Entrepreneurs)

Source: Croatian Chamber of Forestry and Wood Technology Engineers (2015).

The variety of funding sources for the forest sector is confirmed by the replies received through the online consultation (Figure 23).

**Figure 23. Other sources of funding of forest-related activities (excluding EAFRD)**



Respondents indicate that public funding sourced from regional budgets is the most frequently used (54% of the selections). The second most frequently accessed source is public funding from local budgets (39%). With regard to alternative EU sources, the most common are the LIFE programme, selected by 36% of the respondents, and the ERDF (including Interreg), selected by 26% of the respondents. There are differences in the reliance on the various sources between local and regional authorities. **EU sources such as ERDF, ESF, LIFE and Horizon 2020 are by far accessed more by regional authorities than by local authorities. Regional authorities are also more active in accessing funds from the private sector.**

While it is not possible to provide a quantitative analysis of planned allocations for forest-related support within the ERDF, the ESF and the CF, it is possible to quantify the support given to the forest sector through the European Territorial Cooperation (ETC), or INTERREG, the EU Solidarity Fund, Horizon 2020, LIFE, Erasmus+, and other sources for investments.

- **INTERREG.** Since 2014 and according to the analysis of the information downloaded in May 2018 from the [keep.eu](http://keep.eu) online database, at the EU level there are at least 23 interregional cooperation projects addressing forest-related topics, for a total budget of over EUR 39 million. Out of this total, EUR 28.5 million are contributed by the EU.
- **EU Solidarity Fund.** EU support is made available under this fund to respond to major natural disasters among which are forest fires. Since 2014, two forest fires events in Portugal and Spain were granted EU aid from the fund (in 2017), for a total amount of EUR 53.7 million (EC, 2018).
- **Horizon 2020.** H2020 is the EU programme for research and innovation. The analysis of the H2020-funded projects downloaded from CORDIS database on 14 May 2018 reveals that since the inception of the programme at least 84 funded projects may be considered as addressing topics directly related to the forest sector. Overall, these projects have a total cost of EUR 306 million and receive **about EUR 228 million of EU contribution.**

Among the projects, the ERA-NET Cofund ‘ForestValue – Innovating forest-based bioeconomy’ (1/10/2017 – 30/09/2022) brings together 31 EU and non-EU partners and has a total cost of EUR 15.2 million, out of which EUR 5 million are co-financed by the EU. Across the 84 identified projects, prevailing undertaken actions include Marie Skłodowska-Curie actions (MSCA), actions implemented under the Bio-based Industry Joint Undertaking (BBB JU)<sup>1</sup>, actions implemented under the SME Instrument scheme, and Coordination & support actions (CSA). In late 2017, the [Forest-based Sector Technology Platform](#) (FTP) released a guide on the call topics relevant to the forest sector published in the 2018-2020 H2020 work programmes. According to the guide, there are some 49 calls in the remaining three years of implementation of H2020 which may be used to address forest-related topics. These calls total a funding budget of over EUR 1.57 billion and are found under the following pillars/societal challenges: Industrial Leadership; Food Security, sustainable agriculture and forestry, marine and maritime and inland water research and the bioeconomy; Secure, Clean and Efficient Energy; Climate action, environment, resource efficiency and raw materials; and Excellent science (FTP, 2017).

- **LIFE.** LIFE is the EU financial instrument supporting environmental, nature conservation, and climate action projects. The analysis of the approved projects downloaded on May 2018 from the LIFE programme 2014-2020 data hub of the Executive Agency for Small and Medium-sized Enterprises (EASME), reveals that there are at least 26 projects addressing the forest sector. These projects have allocated approximately EUR 58 million, out of which EUR 37 million are contributed by the EU.
- **Erasmus+.** Erasmus+ is the EU programme for education, training, youth and sport. The review of the list of Erasmus+ projects approved since 2014 reveals that at least 76 projects address topics related to the forest sector. Most of these projects (75%) fall under the ‘Learning Mobility of Individuals’ key action, the rest (25%) are under the ‘Cooperation for innovation and the exchange of good practices’ key action. These 76 projects are granted a total of over **EUR 14 million** (Erasmus+ Project Results [Platform](#), accessed on May 2018).

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<sup>1</sup> BBB JU is a particularly relevant initiative for the forest sector. It is a Public-Private Partnership between the EU and the Bio-based Industries Consortium that operates under Horizon 2020 and aims at developing the European bio-based industry sector. Over the period 2014-2020, it has been allocated a budget of EUR 3.7 billion.

- **European Investment Bank (EIB) and other sources for investment.** Since 2014, the EIB has contributed to investments in the forest sectors of Ireland, Sweden and Spain with EUR 216 million<sup>2</sup> (EIB loans' database online). Support in Ireland covers investment in privately owned forests and forest assets across the country, and a long-term loan to the state-owned commercial forestry company. Investment in Spain covers support to both forestry and coastal management. In Sweden, the EIB loan supports a major sawmill company which is also the largest private forest owner in Europe. Portugal has recently (2017) benefitted from the [Marguerite II fund](#), a pan-European equity fund supporting infrastructure investments in energy, renewables, transport and the digital sector (the fund is contributed by the EIB with EUR 200 million). Support has been given to the financing, design, construction and operation of two biomass plants near Viseu and Fundão. 90% of the long-term debt of EUR 80 million has been taken over by Marguerite II as shareholder of the two companies which run the plants.

In summary, for the current programming period 2014-2020, commitments and actual expenditure for the forest sector indicate that, **to date**:

- EUR 7,132 million have been earmarked through the Rural Development Programmes.
- About EUR 93 million (this is an underestimate) have been mobilised under the European regional policy.
- At least some EUR 378 million have been mobilised under EU programmes directly managed by the EC.

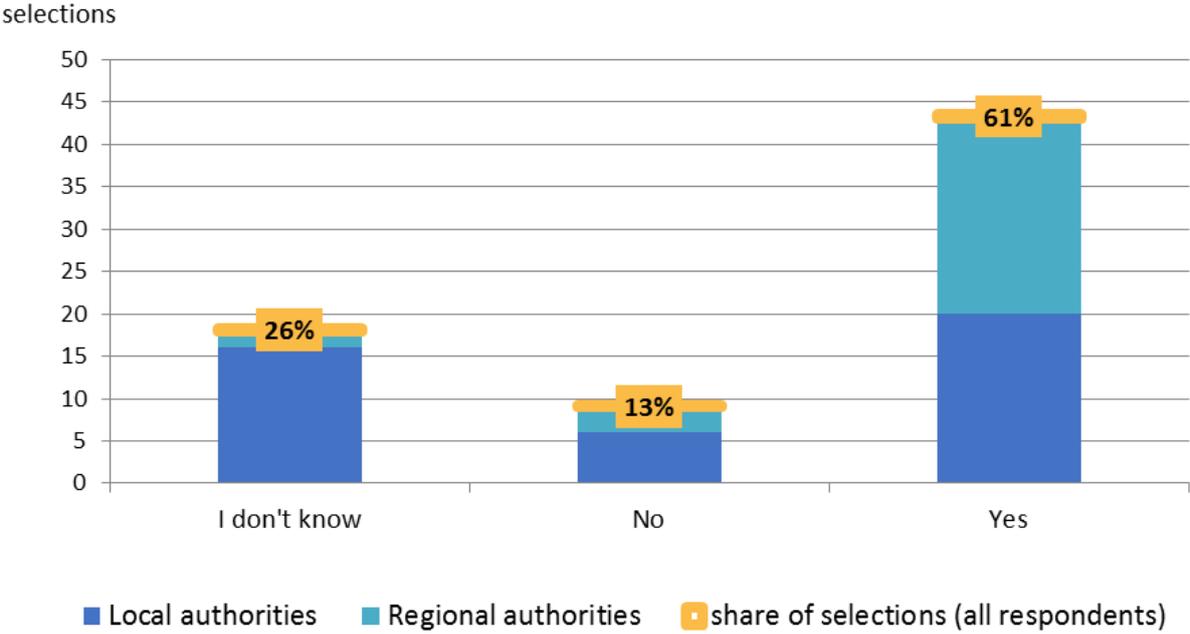
In addition, about EUR 300 million of EU funds have been lent to date to facilitate investments in the forest sector.

LRAs participating in the consultation **generally agree (61% of the replies) with the intention to leave the co-financing of forestry measures through rural development funds as the main source of EU funding for the sector.** Among those that do not have an opinion on this strategic choice (26%) or that object to it (13%), local authorities prevail (Figure 24).

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<sup>2</sup> This adds to the almost EUR 1.8 million of loans provided by the bank for the co-financing of rural development 2014-2020 in Estonia, Hungary, Latvia, Poland, Romania, Slovakia, and the Spanish Autonomous Communities of Castilla y León and Galicia.

**Figure 24. Opinions on the prevailing financing of the forest sector through RDPs**

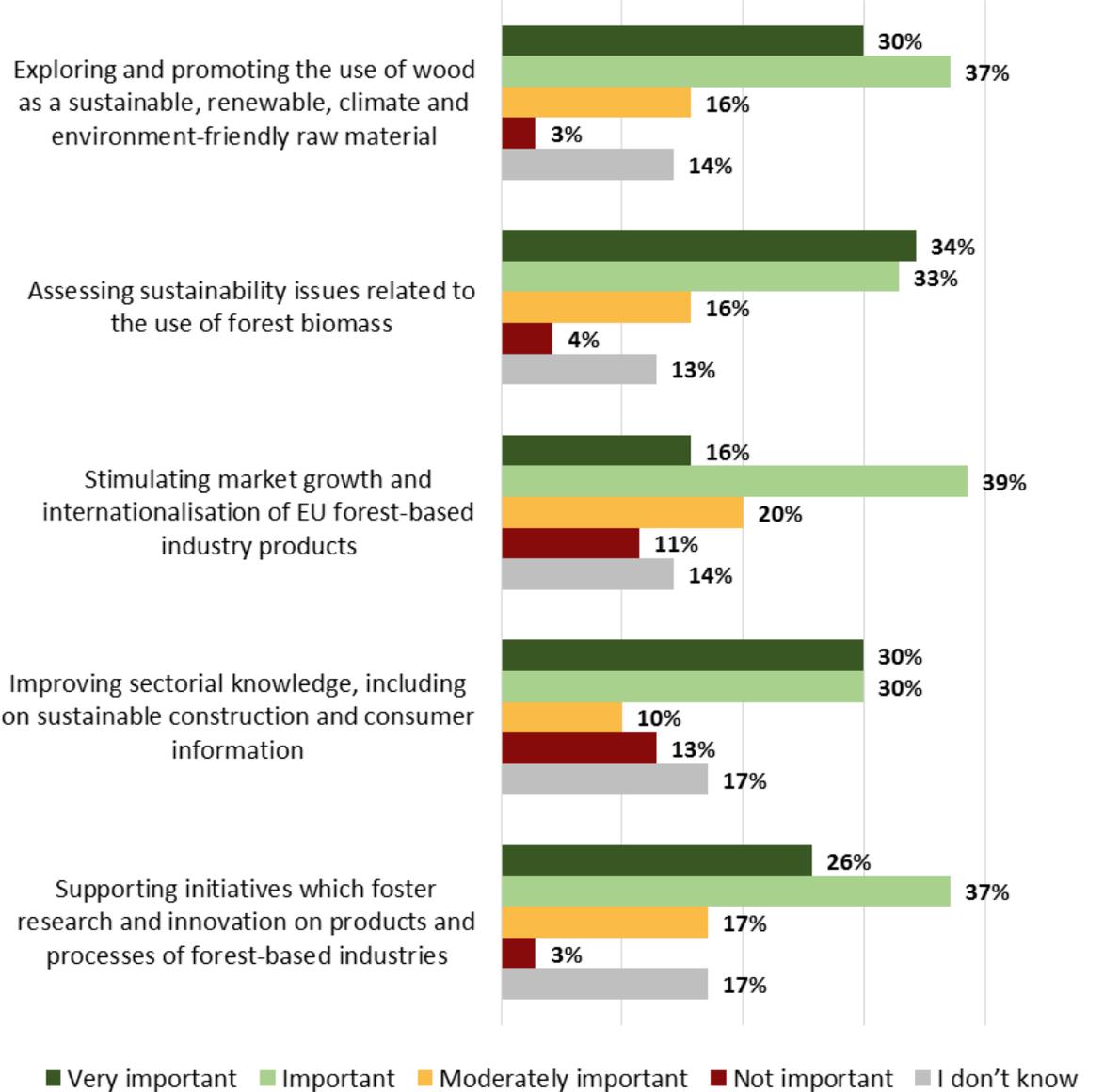


# Part 4 Expectations of LRAs on the future of the EU Forest Strategy

This section reports on the expectations of LRAs on the future of the EU Forest Strategy according to the opinions expressed by the sample of local and regional authorities which took part in the consultation.

With regard to the competitiveness and sustainability of European forest-based industries, in the experience of the respondents **the EU Forest Strategy is still a very important or an important framework for the development of the sector** (Figure 25).

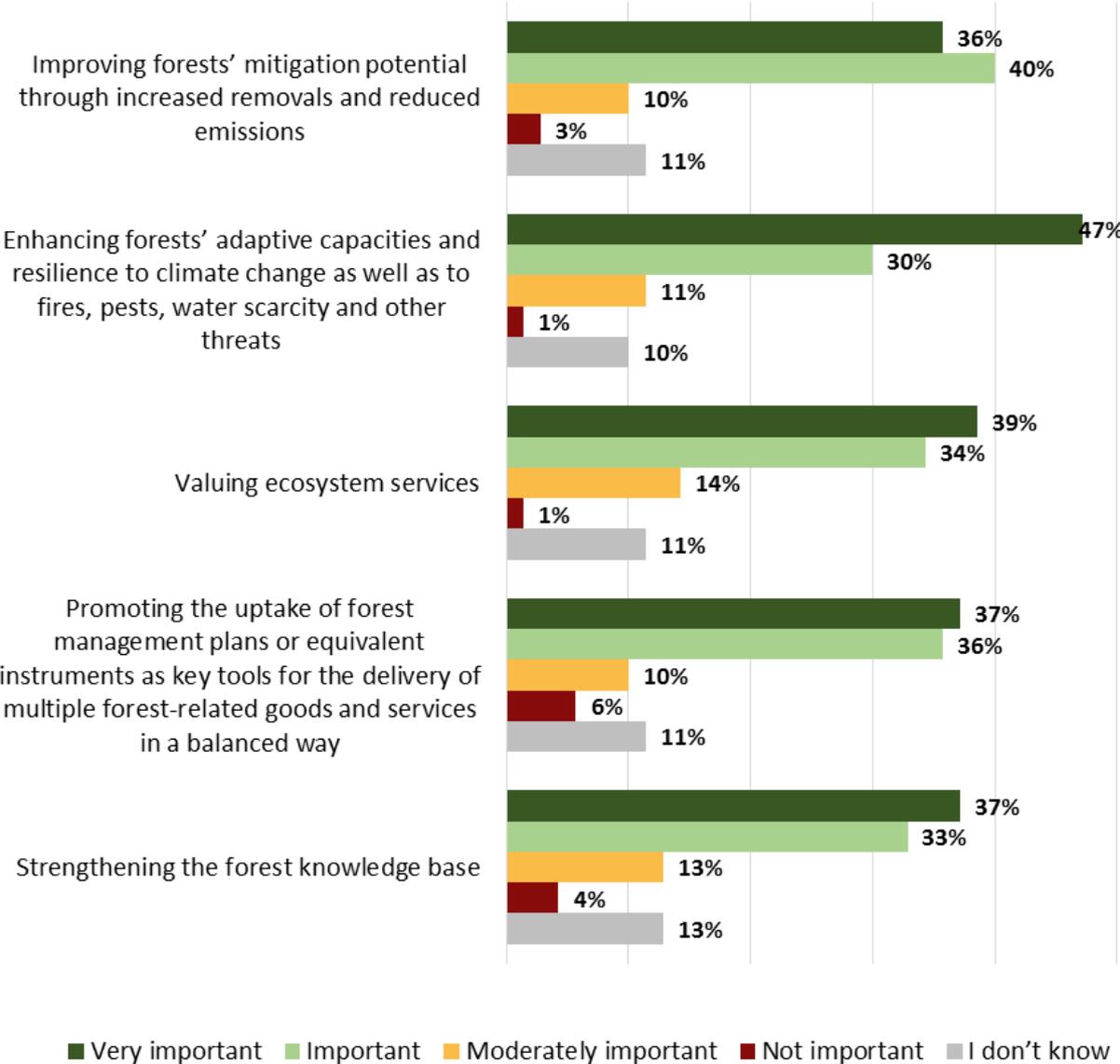
**Figure 25. The EU Forest Strategy as a framework for the development of the sector**



Namely, the EU Forest Strategy is considered very important or important by some 60-70% of the respondents with regard to the following areas of intervention: further exploration and promotion of the use of wood; assessment of the sustainability issues related to the use of forest biomass; improvement of sectorial knowledge; and provision of support to sectorial research and innovation. Instead, **respondents are less convinced** on the suitability of the EU Forest Strategy to **stimulate market growth and internationalise EU forest-based industry products**.

Notably, the EU Forest Strategy is considered **an even more important framework for valuing forests** (Figure 26).

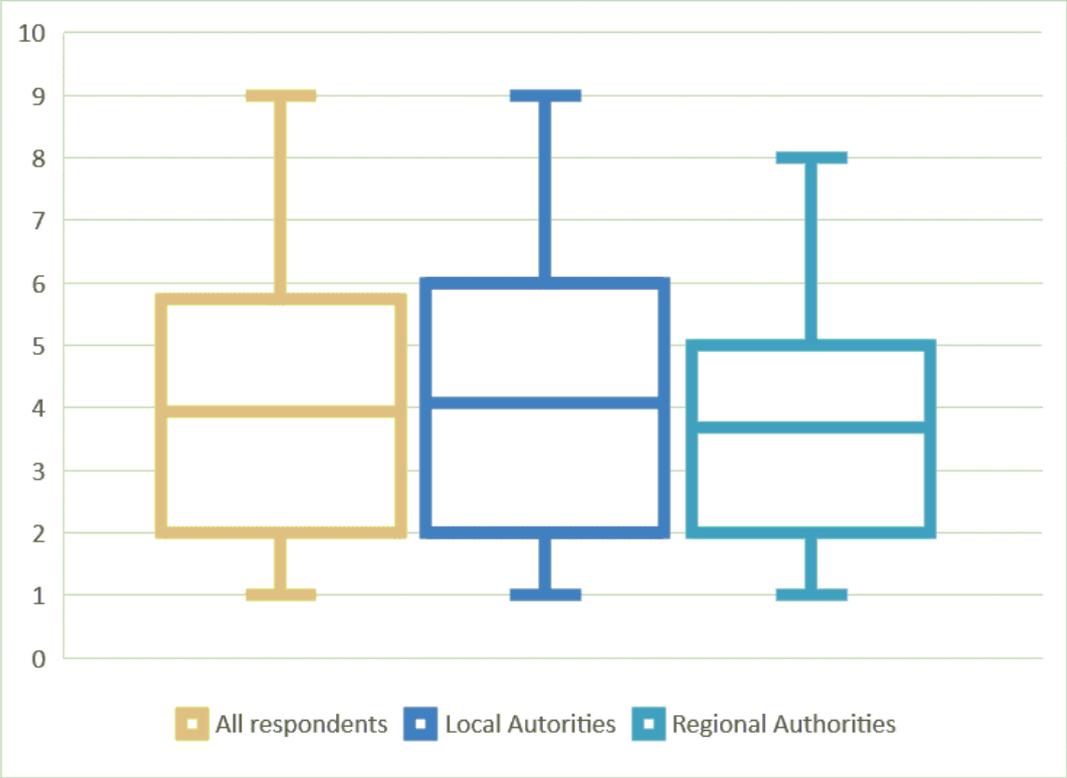
**Figure 26. The EU Forest Strategy as a framework for valuing forests**



The figure clearly shows that compared to the valuing of the sector, respondents are more positive and more convinced on the importance of the strategy for improving forests’ potential, capacities, management, and knowledge base as well as for valuing ecosystem services.

**Notwithstanding the evident trust in an EU common framework for the sector**, LRAs participating in the consultation believe that the EU Forest Strategy **is not reaching out to forest owners and managers** who are the ones actually implementing policies and regulations at the territorial level (Figure 27). On a scale from 1 to 10 the average score is below 4. Regional authorities appear to be more disappointed than local authorities, their average score being 3.9.

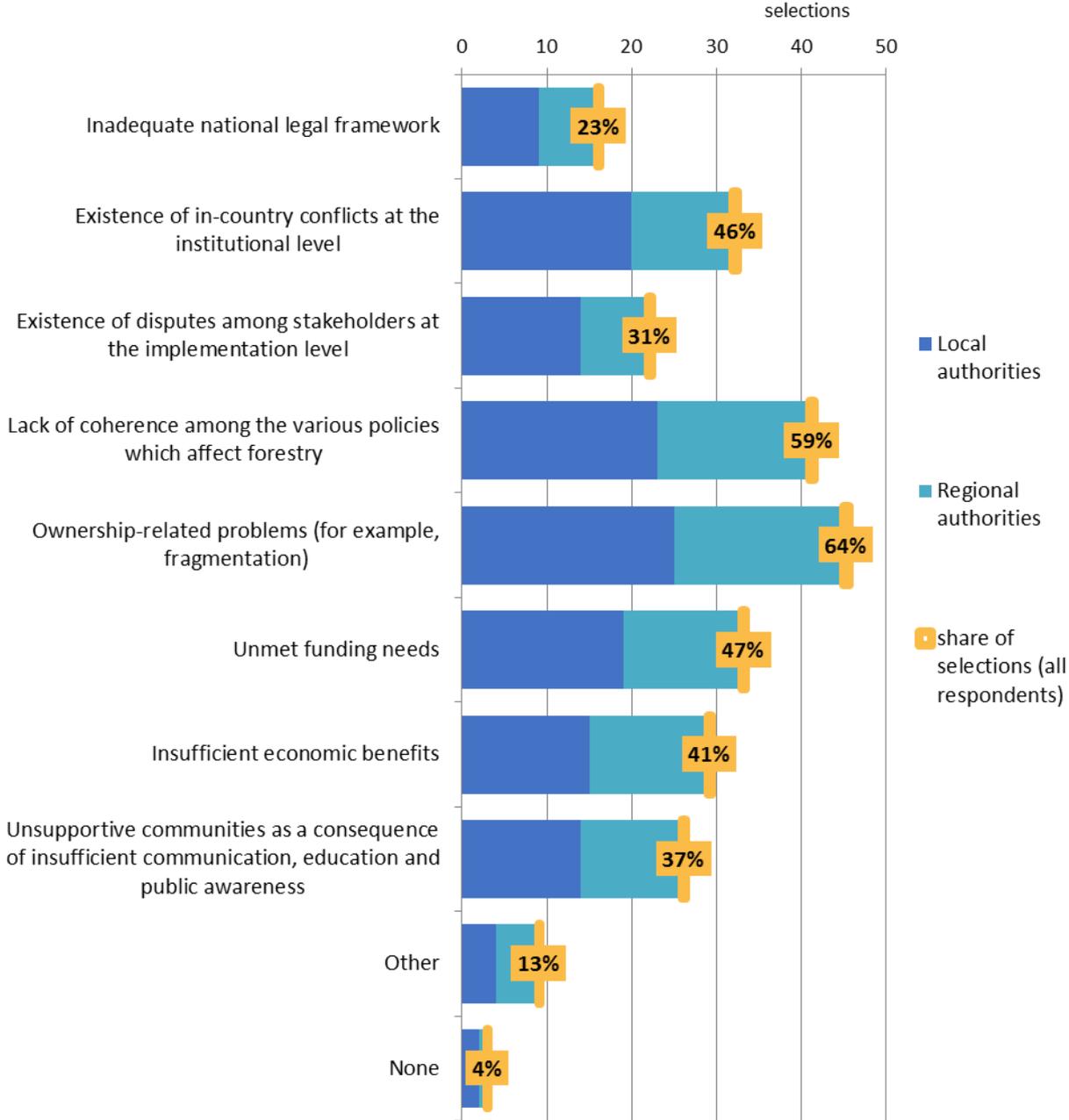
**Figure 27. Scoring the reach out capacity of the EU Forest Strategy**



In the opinion and experience of respondents, **main obstacles to the contribution of local and regional authorities to key objectives of the EU Forest Strategy** (e.g. ensuring that all forests in the EU are managed according to sustainable forest management principles, hence contributing to balancing various forest functions; meeting demands; delivering vital ecosystems services; and fostering the competitiveness and sustainability of forestry and of the whole forest-based value chain) are both **structural and strategic** (Figure 28). More specifically, ‘problems related to forest ownership’ is by far the most selected obstacle (64% of the selections), followed by the ‘lack of coherence among the

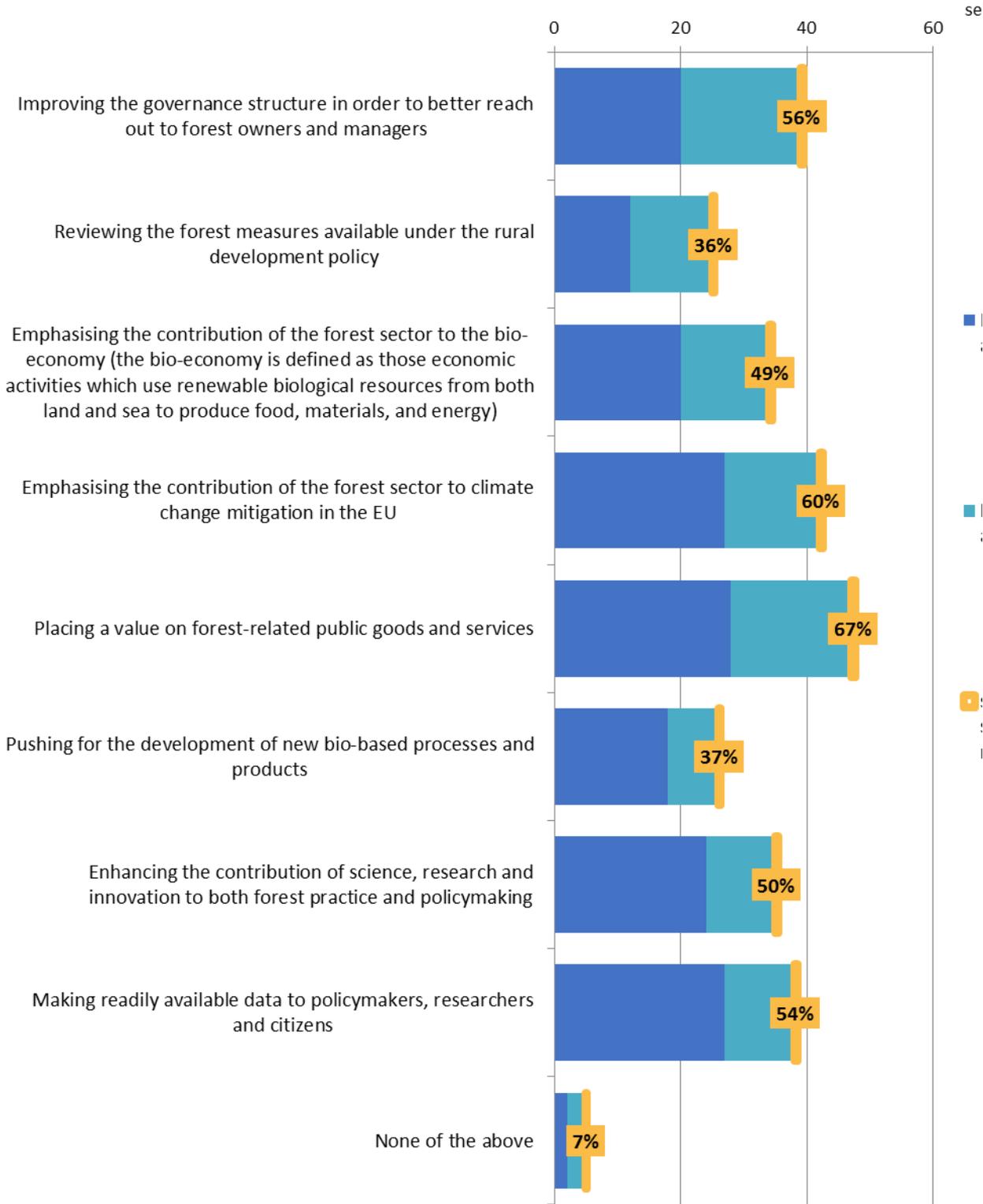
various policies which affect forestry’ (59% of the selections). ‘Unmet funding needs’ and the ‘existence of in-country conflicts at the institutional level’ represent a concern for almost half of the respondents (47% and 46%, respectively). ‘Insufficient economic benefits’ derived from forestry is a problem for 41% of the respondents, more pronounced for respondents from regional authorities (50%) than for those from local authorities (36%).

**Figure 28. Opinions on the obstacles to the contribution of LRAs to the EU Forest Strategy’s objectives**



**With a view to bringing more benefits to the territorial level**, in the opinion of respondents, the EU Forest Strategy should, in the future, **prioritise the placing of a value on forest-related public goods and services** (67% of the selections) (Figure 29).

**Figure 29. Future priorities of the EU Forest strategy in the opinion of participating LRAs**



A comparable importance should be given, according to respondents, to **emphasising the contribution of the forest sector to climate change mitigation in the EU** (60% of the selections), and to **improving the governance structure in order to better reach out to forest owners and managers** (56% of the selections). Only about one-third of the respondents (36%) pointed to the prioritisation of the revision of the forest measures available under the rural development policy.

## Part 5 Conclusions and recommendations

For the forest sector to become an important player in the development of rural economies and in the replacement of non-renewable resources, it is in everyone's interests **to strengthen the role of active (vs. passive) forest owners and of those forest managers who are concerned about sustainable management practices**. Local and regional authorities across the EU own an estimated 14% of the total EU forest area, equivalent to 21.9 million hectares of forests. LRAs are not only forest owners. In addition to their own forests, they may manage the forests of other public entities or of communities, or may support and guide private forest owners in their management practices. In fact, the evidence collected in this study shows that LRAs **do contribute to achieving the objectives of the EU Forest Strategy by:**

- Pursuing the management of their own and of other stakeholders' forests according to sustainable forest management principles. This is achieved, for example, through the obtainment of a certification with accredited schemes such as FSC and PEFC, or through the development of quality labels.
- Emphasising the multiple use of forests. Urban forestry and its contribution to realising the full potential of forests is a concrete example in this sense. Other forests' uses often combined by LRAs include protection and conservation functions, social functions and timber production.
- Balancing various forest functions. The growing competition between raw material use (for example in the construction industry) and use of wood for bioenergy, which remains unsolved at the policy level, may find a balance at the territorial level where LRAs are inspired by their institutional role to be concurrently ecologically- and economic-oriented owners/managers of forests.
- Meeting societal demands through the delivery of forest-based services related, for example, to healthy environment, quality of life, and landscape and recreational amenities.
- Initiating wood mobilisation processes towards the development of sustainable forest-based value chains, for example through the establishment of sawmills and the supply of raw material to local or regional wood industries.

- Driving multi-actor approaches towards different targets such as forest certification, wood mobilisation (with the consequent unlocking of forest areas and of their potential), and cascading use of wood (from raw materials and residues to wood products, re-use, recycle, and bio-energy).
- Attracting or mobilising public or private investments for forest-based activities.

Accordingly, **considerations for the future review of the EU Forest Strategy distinguish between facilitating LRAs' contribution towards the accomplishment of the EU Forest Strategy's objectives and meeting LRAs' expectations.**

## **5.1 Facilitating the contribution of LRAs**

In line with the findings of the consultation, it appears that actions at the EU level facilitating LRAs' contribution towards the accomplishment of the EU Forest Strategy's objectives may consider:

- **Increasing the EU funding available through alternative sources to RDPs.** The consultation highlights the fact that a significant part of the respondents are from LRAs that do not benefit from EAFRD funding. This means they may access as little as 10% of the resources committed to the forest sector at the EU level if the remaining 90% has been allocated to RDPs.
- **Better engaging of LRAs in forest-related EC-led or EC-supported activities.** The majority of the respondents report their entity has not benefitted from any general or specific type of engagement. Engaging LRAs owning and/or managing forests may have positive side-effects as there is evidence that LRAs are pivotal to the involvement of private forest owners in sustainable management paths.
- **Increasing the availability or accessibility of instruments facilitating investments in the sector** (equity funds, loans). The contribution given by the EU Forest Strategy to the growth of forest-based industries is considered disappointing by respondents.
- **Better informing institutional forest stakeholders** on regulatory and policy changes and on their practical implications at the ground level. The

share of respondents who are not aware of important EU regulations is significant.

- **Better disseminating good/best practices at the territorial level** to inspire and suggest sources of financing, technologies, innovative ideas, and solutions to problems/needs which in several cases are common to different countries (such as fragmentation of properties, locked properties caused by inactive private forest owners).
- **Systematically producing, making easily available and disseminating (geo-referenced) information** to allow institutional forest owners and managers to take informed decisions at the operational level. The Forest Information System for Europe is unknown to most of the respondents.

## 5.2 Meeting the expectations of LRAs

According to the consultation, the following aspects are expected to be prioritised in the future and within the framework of the EU Forest Strategy:

- **Increasing the coherence among the various EU policies which affect forestry. The guidance function of the EU Forest Strategy is undermined** by the absence of one common EU regulatory framework for forests and the co-existence of different policy objectives which concurrently and diversely impact on forests. One of the main consequences is that the funding for the sector (mostly channelled through the rural development policy) depends very much on the priorities set by individual Member States (and regions). This situation does not support the even sustainable development of the sector across the EU, and leaves the burden at the territorial level of finding trade-offs between policy drivers, market forces and societal demands.
- **Reviewing the governance structure of the EU Forest Strategy to improve the strategy's capacity to reach out to those stakeholders who are actually implementing it on the ground.** In the experience and opinion of the respondents the EU Forest Strategy is a very important or important framework for the development of the sector. It is even more important when it comes to valuing forests. Notwithstanding this apparent trust in an EU common framework for the sector, LRAs participating in the consultation believe that the EU Forest Strategy is not reaching out to forest owners and managers who are actually implementing forest policies and regulations at the territorial level.

- **Making forest-based activities economically viable and profitable.** Placing a value on forest-related public goods and services, including the contribution to conservation and protection goals, is considered a priority for the future as these goods and services are currently delivered for the benefit of society without determining any return to forest owners.
- **Focussing more on forests' adaptive capacities and climate change mitigation functions.** Enhancing the resilience of forests to climate change and adversities as well as emphasising the contribution of the forest sector to climate change mitigation is considered a priority for the future. According to the view of the European State Forest Association, this requires investments in adaptive forest management, sustainable forest management, and active forest management (EUSTAFOR, 2018).

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# Annex II – Questionnaire for the consultation (English version)

Language:

  
**European Committee of the Regions**

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

This consultation on the EU Forest Strategy (COM(2013)659 final 'A new EU Forest Strategy: for forests and the forest-based sector') is addressed to public local and regional authorities, or their groupings, owning and/or managing forests in the EU. It is run upon the request of the European Committee of the Regions (CoR), the European Union's assembly of regional and local representatives.

The main objective of the consultation is to collect local and regional authorities' opinions and experience with regard to implementation and impact aspects of the EU Forest Strategy as well as expectations for its future. Results will feed into the CoR's contribution to the upcoming mid-term review of the strategy, expected in the second half of 2018.

The consultation is in the form of an online questionnaire including 17 questions. It takes about 15 minutes to reply to the questions. The questionnaire is available in English, French, German, Italian, and Spanish. Please select on the top of the page the language you prefer for accessing the questionnaire. You will be able to change the selected language at any time during the compilation of the questionnaire. This consultation remains open up to 8 June 2018.

For any further information, please contact [info@forestrysurvey.eu](mailto:info@forestrysurvey.eu).

If you wish to participate in the consultation, click now on 'Next' (or 'Suivant', 'Weiter', 'Avanti', 'Siguiente') at the bottom of the page.

  
**Progress Consulting Srl**



**Privacy Policy**

*The follow-up to your contribution requires that your personal data (name, contact details, etc.) be processed in a file. Participation in the consultation is voluntary.*

*At the latest after 6 months from the delivery of the final report of the study to the Committee of the Regions (estimated date: 30/06/2018), the technical data (i.e. the contributions) will be rendered anonymous by attributing a randomly generated code to each completed questionnaire.*

*Should you require further information or wish to exercise your rights under Regulation (EC) No 45/2001 (e.g. to access, rectify, or delete your data), please contact [rsoldi@progressoons.com](mailto:rsoldi@progressoons.com), or the data controller of this survey's end-user: [Studies-DLWs@cor.europa.eu](mailto:Studies-DLWs@cor.europa.eu).*

*If necessary, you may also contact the CoR Data Protection Officer ([data.protection@cor.europa.eu](mailto:data.protection@cor.europa.eu)). You have the right of recourse to the European Data Protection Supervisor at any time ([www.edps.europa.eu](http://www.edps.europa.eu)).*

*For further information on CoR data protection policy and the use of your contributions, please consult the following legal notice: [Privacy Statement \(full version\)](#).*

*Please note that the answers you provide can be used, in an anonymised form, for drafting a report. That report could be transmitted to CoR rapporteurs and other EU institutions and used in CoR studies and publications. If you do not wish so, please inform us accordingly.*

**Your consent:**

- Having read the [Privacy Statement](#), I consent the answers provided in my contribution are used and analysed for the purpose of the study 'Sustainable Forest Management in Regions' commissioned by the European Committee of the Regions. Answers will be aggregated and presented in a variety of ways but always guaranteeing the anonymity of respondents.

## SECTION 1 – IMPLEMENTATION IN YOUR TERRITORY

1 - Your public entity is:

- Forest owner
- Forest manager

2 - Please indicate if your entity is involved in:

- Administering forest policy implementation
- Forest law enforcement and/or forest surveillance
- Support to private forest management
- Other forest-related activities
- None of the above (please note that if you select this option, any of the selections above will be considered null)

3 - Please specify the principal use of the forests your entity own/manage:

- Timber production
- Production of other wood and non-wood forest products
- Protection and conservation functions
- Social functions (for example, recreational, educational, touristic, cultural, and aesthetic)
- Other

4 - Regarding forest management, please indicate if your entity:

- Uses forest management plans or equivalent instruments to manage forests
- Has included in forest management plan(s) biodiversity considerations, including Natura 2000 conservation objectives
- Manages forests according to sustainable forest management principles
- Implements protection, monitoring and/or prevention mechanisms for forest fires through forest management
- Implements mechanisms for protecting forests against pests, drought, or other threats through forest management

- Has obtained a forest management certification for all or part of the owned/managed forests
- Systematically collects forest information for monitoring and evaluation purposes
- None of the above (please note that if you select this option, any of the selections above will be considered null)

5 - Please indicate if your entity is using EU rural development funds from the European Agricultural Fund for Rural Development (EAFRD) for the following:

- Afforestation and creation of woodland
- Establishment of agro-forestry systems
- Prevention of damage and restoration of forests
- Improvement of the resilience and of the environmental value of forest ecosystems
- Investments in forestry technologies and in processing, in mobilising and in the marketing of forest products
- Undertake of forest-environmental and climate service commitments
- Conservation of forest genetic resources
- Compensation payments for Natura 2000 forest areas
- Drawing-up of forest management plans or equivalent instruments
- Other support activities for forests and the forest sector (for example, training, demonstration activities, advisory services)
- My entity is not using EU rural development funds for forests and the forest sector (please note that if you select this option, any of the selections above will be considered null)

6 - According to your opinion and experience, are the existing measures funded from the EAFRD adequate to promote sustainable forest management at the territorial level?

- Very adequate
- Adequate
- Moderately adequate
- Not adequate
- I don't know

7 - Please indicate which other sources of funds, apart from EAFRD, your entity is using for the financing of forest-related activities:

- Local budget/funds
- Regional budget/funds
- National funds

- European Regional Development Fund (including the Interreg programme)
- European Social Fund
- LIFE (the EU financial instrument supporting environmental, nature conservation and climate action projects)
- Horizon 2020 (the EU programme for research and innovation)
- COSME (the EU programme for small and medium-sized enterprises)
- European Investment Bank
- Private sources
- Other
- None (please note that if you select this option, any of the selections above will be considered null)

## SECTION 2 – IMPACT AT THE LOCAL AND REGIONAL LEVEL

8 - In your opinion and experience, at the territorial level, the current EU Forest Strategy has contributed to:

(please assess each option from min 1 to max 10)

Promote the multifunctional potential of EU forests

1 2 3 4 5 6 7 8 9 10 I don't know

Satisfy the growing demand for raw material for existing and new products and for renewable energy

1 2 3 4 5 6 7 8 9 10 I don't know

Stimulate the growth of forest-based industries

1 2 3 4 5 6 7 8 9 10 I don't know

Protect forests and biodiversity from the effects of adversities such as storms, fires, pests, and/or drought

1 2 3 4 5 6 7 8 9 10 I don't know

9 - In your opinion and experience, in your territory, forests and their management are currently contributing to:

(please assess each option from min 1 to max 10)

Economic growth

1 2 3 4 5 6 7 8 9 10 I don't know

Job creation

1 2 3 4 5 6 7 8 9 10 I don't know

Rural development

1 2 3 4 5 6 7 8 9 10 I don't know

Improvement of citizens' quality of life through the delivery of societal benefits

1 2 3 4 5 6 7 8 9 10 I don't know

Improvement of the quality of the environment

1 2 3 4 5 6 7 8 9 10 I don't know

10 - In terms of engagement, please indicate if your entity:

- Has benefitted from the Horizon 2020 programme for forest-related topics (for example, financially or in terms of technological/scientific knowledge)
- Has received forest-related support through the activities of the European Innovation Partnership on Agricultural Productivity and Sustainability
- Has been reached by forest-related information and communication activities of the European Commission
- Has benefitted from the EU level dissemination of forest-related results and good practices
- None of the above (please note that if you select this option, any of the selections above will be considered null)

11 - Please indicate if and how the following initiatives of the European Commission have an impact on the forest-related activities of your entity:

The revision of the conditions for state aid in the forestry sector and in rural areas (Regulation (EU) No 702/2014 declaring certain categories of aid in the agricultural and forestry sectors and in rural areas compatible with the internal market):

- Positive impact
- Negative impact
- No impact
- I am not aware of this initiative

The EU Timber Regulation (Regulation (EU) No 995/2010)

Positive impact

- Negative impact
- No impact
- I am not aware of this initiative

The set-up of the Bio-based Industry Joint Undertaking (BBI JU, <https://www.bbi-europe.eu/>)

- Positive impact
- Negative impact
- No impact
- I am not aware of this initiative

The development of the Forest Information System for Europe (FISE, <http://fise.jrc.ec.europa.eu/>)

- Positive impact
- Negative impact
- No impact
- I am not aware of this initiative

### SECTION 3 – LOOKING AHEAD

12 - The EU Forest Strategy reiterates that the co-financing of forestry measures through rural development funds remains the main source (90% of total EU forestry funding) of EU funding for the sector. Do you agree with this?

- Yes
- No
- I don't know

13 - Thinking to the competitiveness and sustainability of European forest-based industries, in your experience the EU Forest Strategy is still an important framework for:

Exploring and promoting the use of wood as a sustainable, renewable, climate and environment-friendly raw material

- Very important
- Important

- Moderately important
- Not important
- I don't know

Assessing sustainability issues related to the use of forest biomass

- Very important
- Important
- Moderately important
- Not important
- I don't know

Stimulating market growth and internationalisation of EU forest-based industry products

- Very important
- Important
- Moderately important
- Not important
- I don't know

Improving sectorial knowledge, including on sustainable construction and consumer information

- Very important
- Important
- Moderately important
- Not important
- I don't know

Supporting initiatives which foster research and innovation on products and processes of forest-based industries

- Very important
- Important
- Moderately important
- Not important
- I don't know

14 - Thinking to the role of forests and the multiple goods and services they deliver, the EU Forest Strategy is still an important framework for:

Improving forests' mitigation potential through increased removals and reduced emissions

- Very important
- Important
- Moderately important
- Not important
- I don't know

Enhancing forests' adaptive capacities and resilience to climate change as well as to fires, pests, water scarcity and other threats

- Very important
- Important
- Moderately important
- Not important
- I don't know

Valuing ecosystem services

- Very important
- Important
- Moderately important
- Not important
- I don't know

Promoting the uptake of forest management plans or equivalent instruments as key tools for the delivery of multiple forest-related goods and services in a balanced way

- Very important
- Important
- Moderately important
- Not important
- I don't know

## Strengthening the forest knowledge base

- Very important
- Important
- Moderately important
- Not important
- I don't know

15 - According to your experience, is the EU Forest Strategy reaching out to forest owners and managers who are actually implementing policies and regulations at the territorial level?

1   2   3   4   5   6   7   8   9   10   I don't know

16 - The EU Forest Strategy aims at ensuring that all forests in the EU are managed according to sustainable forest management principles, hence contributing to balancing various forest functions, meeting demands, delivering vital ecosystems services, and fostering the competitiveness and sustainability of forestry and of the whole forest-based value chain. In your opinion and experience, obstacles to the contribution of local and regional authorities to these objectives include:

- Inadequate national legal framework
- Existence of in-country conflicts at the institutional level
- Existence of disputes among stakeholders at the implementation level
- Lack of coherence among the various policies which affect forestry
- Ownership-related problems (for example, fragmentation)
- Unmet funding needs
- Insufficient economic benefits
- Unsupportive communities as a consequence of insufficient communication, education and public awareness
- Other
- None (please note that if you select this option, any of the selections above will be considered null)

17 - In your opinion and with a view to bring more benefits at the territorial level, the EU Forest Strategy shall, in the future, focus more on:

- Improving the governance structure in order to better reach out to forest owners and managers
- Reviewing the forest measures available under the rural development policy

- Emphasising the contribution of the forest sector to the bio-economy (the bio-economy is defined as those economic activities which use renewable biological resources from both land and sea to produce food, materials, and energy)
  - Emphasising the contribution of the forest sector to climate change mitigation in the EU
  - Placing a value on forest-related public goods and services
  - Pushing for the development of new bio-based processes and products
  - Enhancing the contribution of science, research and innovation to both forest practice and policymaking
  - Making readily available data to policymakers, researchers and citizens
  - None of the above (please note that if you select this option, any of the selections above will be considered null).
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**European Committee  
of the Regions**

Created in 1994 following the signing of the Maastricht Treaty,  
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local representatives from all 28 Member States, representing over 507 million Europeans.

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