

MAIN REPORT

Mid-term evaluation of the implementation of the EU Forest Action Plan

Service Contract No. 30-CE-0227729/00-59

By an external evaluation team of

Lead Contractor:



European Forest Institute (EFI)
(Joensuu, Finland and Regional Office EFIMED in Barcelona, Spain)
Torikatu 34, 80100 Joensuu, Finland

Subcontractors:



University of Natural Resources and Applied Life Sciences (BOKU)
Institut für Wald-, Umwelt- und Ressourcenpolitik
Feistmantelstraße 4
A-1180 Wien, Austria



Centre Tecnològic Forestal De Catalunya (CTFC)
Ctra. de St. Llorenç de Morunys, Km 2
E-25280 Solsona, Spain



University of Hamburg, Institute for World Forestry (UHH/vTI)
Leuschnerstr. 91
D-21031 Hamburg, Germany

November 2009

Mid-term evaluation of the implementation of the EU Forest Action Plan

Tender No. AGRI-2008-EVAL-07

Service contract No 30-CE-0227729/00-59

This study has been financed by the Commission of the European Communities and produced by an external evaluation team of European Forest Institute EFI (coordinator), University of Natural Resources and Applied Life Sciences BOKU, Centre Tecnològic Forestal De Catalunya CTFC and University of Hamburg, Institute for World Forestry UHH/vTI. The conclusions, recommendations and opinions presented in the study reflect those of the external evaluators and do not necessarily reflect the opinion of the European Commission.

Project team:

EFI: Ilpo Tikkanen (coordinator), Päivi Pelli, Jo Van Brusselen, Terhi Vilén

BOKU: Gerhard Weiss, Saana Tykkä, Ewald Rametsteiner

CTFC: Glòria Domínguez, Dennis Boglio

UHH/vTI: Manuela Kenter, Aljoscha Requardt

Publication reference:

Pelli, P., Tikkanen, I., Van Brusselen, J., Vilén, T., Weiss, G., Tykkä, S., Domínguez, G., Boglio, D., Kenter, M. (2009) Mid-term evaluation of the implementation of the EU Forest Action Plan. A Study for the DG Agriculture and Rural Development. AGRI-2008-EVAL-07.

List of contents

| | |
|---|-----------|
| List of figures and tables | 5 |
| Glossary of terms..... | 7 |
| List of Abbreviations | 9 |
| Member State abbreviations | 11 |
| | |
| 1 Introduction..... | 12 |
| | |
| 2 Structure of the forest sector in the EU and overview of the policy framework | 14 |
| 2.1 Structure of the forest sector in the EU | 14 |
| 2.1.1 Forests in the EU | 14 |
| 2.1.2 Forestry in the EU | 15 |
| 2.1.3 Forest-based industries in the EU | 17 |
| 2.2 Policy landscape for the EU FAP | 18 |
| 2.2.1 International policy setting | 18 |
| 2.2.2 Community policy setting | 19 |
| 2.2.3 The EU Forest Action Plan | 24 |
| 2.2.4 National forest policies and NFPs in the EU and their relation to the EU FAP | 27 |
| | |
| 3 Methodology..... | 28 |
| 3.1 General approach, scope and timeframe | 28 |
| 3.2 Intervention logic model, definitions and judgement criteria | 29 |
| 3.3 Data and information sources..... | 31 |
| | |
| 4 Implementation of the EU FAP | 34 |
| OBJECTIVE 1: Improving long-term competitiveness..... | 34 |
| Key Action 1 Examine the effects of globalisation on the economic viability and competitiveness of EU forestry | 34 |
| Key Action 2 Encourage research and technological development to enhance the competitiveness of the forest sector..... | 35 |
| Key Action 3 Exchange and assess experiences on the valuation and marketing of non-wood forest goods and services..... | 36 |
| Key Action 4 Promote the use of forest biomass for energy generation..... | 37 |
| Key Action 5 Foster the cooperation between forest owners and enhance education and training in forestry | 38 |
| OBJECTIVE 2: Improving and protecting the environment | 40 |
| Key Action 6 Facilitate EU compliance with the obligations on climate change mitigation of the UNFCCC and its Kyoto Protocol and encourage adaptation to the effects of climate change..... | 40 |
| Key Action 7 Contribute towards achieving the revised Community biodiversity objectives for 2010 and beyond..... | 41 |
| Key Action 8 Work towards a European Forest Monitoring System..... | 42 |
| Key Action 9 Enhance the protection of EU forests | 43 |

| | |
|---|-----|
| OBJECTIVE 3: Contributing to quality of life..... | 45 |
| Key Action 10 Encourage environmental education and information | 45 |
| Key Action 11 Maintain and enhance the protective functions of forests | 46 |
| Key Action 12 Explore the potential of urban and peri-urban forests | 47 |
| OBJECTIVE 4: Fostering coordination and communication | 48 |
| Key Action 13 Strengthen the role of the Standing Forestry Committee..... | 48 |
| Key Action 14 Strengthen coordination between policy areas in forest-related matters | 49 |
| Key Action 15 Apply the open method of coordination (OMC) to national forest programmes..... | 49 |
| Key Action 16 Strengthen the EU profile in international forest-related processes | 50 |
| Key Action 17 Encourage the use of wood and other forest products from sustainably managed forests | 50 |
| Key Action 18 Improve information exchange and communication | 51 |
| 5 Evaluation of the EU Forest Action Plan..... | 54 |
| EVALUATION THEME 1 Improving competitiveness and enhancing sustainable forestry | 54 |
| EVALUATION THEME 2 Improving and protecting the environment | 64 |
| EVALUATION THEME 3 Contribution to quality of life..... | 73 |
| EVALUATION THEME 4 Improving forest sector co-ordination, coherence and communication | 77 |
| EVALUATION THEME 5 Dissemination of best practices and improving the visibility of the sector | 86 |
| EVALUATION THEME 6 Relevance of the objectives, key actions and activities of the Action Plan..... | 97 |
| 6 Conclusions and recommendations | 105 |

List of figures and tables

Table 1. Forest area, net annual increment and fellings, 2005.

Figure 1. Forest ownership shares public-private in the EU.

Figure 2. Overview of the EU FAP Key Actions and the specific objectives and global objectives.

Figure 3. EU FAP mid-term evaluation: the scope of the implementation review and the evaluation.

Figure 4. The intervention logic approach for the EU FAP mid-term evaluation.

Figure 5. EU FAP Objective 1 implementation status in the Member States.

Figure 6. EU FAP Objective 2 implementation status in the Member States.

Figure 7. EU FAP Objective 3 implementation status in the Member States.

Figure 8. EU FAP Objective 4 implementation status in the Member States.

Figure 9: IL model for the Evaluation Theme 1 Improving competitiveness and enhancing sustainable forestry (EU FAP Objective 1).

Figure 10. Member State and stakeholder assessments on the success of the EU FAP Objective 1.

Figure 11. IL model for the Evaluation Theme 2 Improving and protecting the environment (EU FAP Objective 2)

Figure 12. Member State and stakeholder assessments on the success of the EU FAP Key Actions 6 and 7.

Figure 13. Member State and stakeholder assessments on the success of the EU FAP Key Actions 8 and 9.

Figure 14. IL model for the Evaluation Theme 3 Contributing to the quality of life (EU FAP Objective 3)

Figure 15. Member State and stakeholder assessments on the success of the EU FAP Objective 3.

Figure 16. IL model for the Evaluation Theme 4 Improving forest sector co-ordination, coherence and communication (Key Actions 13 and 14).

Figure 17. Member State perceptions on the EU FAP in relation to their national forest policy / national forest programme (NFP), and on the Standing Forestry Committee's work on sharing experiences and practices between the Member States.

Figure 18. Member State and stakeholder assessment on the success of the EU FAP in improving coordination and coherence between different policy areas in forest sector between EU and Member States.

Figure 19. Member State and stakeholder assessments on the success of the EU FAP in improving coordination and coherence between different policy areas in forest sector within EU Commission.

Figure 20. IL model for the Evaluation Theme 5 Dissemination of best practices and improving the visibility of the sector (EU FAP Objective 4)

Figure 21. Member State and stakeholder assessments on the success of the EU FAP in disseminating best practices and improving the visibility of the sector.

Figure 22. Assessment by the Member States, stakeholders and the Commission services on the question: To what extent is the EU Forest Action Plan addressing relevant forest-related issues in Europe linked to the four EU FAP Objectives.

Glossary of terms

| | |
|-------------------------|--|
| Action | refers to 18 Key Actions of EU Forest Action Plan FAP indicated in COM(2006) 302 final, 15.6.2006 |
| Action Plan | EU Forest Action Plan COM(2006) 302 final, 15.6.2006 |
| Activity | refers to the 55 activities identified in the FAP Work Programme 2007-2011, and any additional activities carried out by the Member States. <ul style="list-style-type: none">- Additional activity: refers to any additional activity of the Member States carried out in the context of the EU FAP in addition to the activities listed in the Work Programme 2007-2011- Parallel activity: happens in parallel to EU FAP |
| Coherence | the extent to which the intervention does not contradict other interventions with similar objectives |
| Effectiveness | the extent to which the EU FAP objectives and intended results are achieved / are expected to be achieved |
| Efficiency | the extent to which outputs and/or the desired effects are achieved with the lowest possible use of resources/inputs (funds, expertise, time, administrative costs, etc.) |
| Forest sector | Forest sector includes the following <i>Nomenclature statistique des Activités économiques dans la Communauté Européenne</i> NACE categories (02, 20, 21): Section A: Agriculture, hunting and forestry Group 02.0: Forestry, logging and related services Section D: Manufacturing Subsection DD: Manufacture of wood and articles in wood Class 20.1: Sawmilling, planing, impregnation of wood Class 20.2: Manufacture of wood panels: Class 20.3: Manufacture of builders' carpentry and joinery Class 20.4: Manufacture of wooden containers Class 20.5: Manufacture of miscellaneous products of wood and cork, basketwork Subsection DE: Manufacture of paper and paper products Class 21.1: Manufacture of pulp, paper and paperboard Class 21.2: Manufacture of articles of paper or paperboard |
| Forest-based industries | The EU forest-based and related industries comprise the following industrial sectors: woodworking (excluding wooden furniture), cork and other forest-based materials; pulp, paper and board manufacturing; paper and board converting; and printing |
| Forestry (sector) | Forestry includes the NACE Section A, Group 02.0 (see above "forest sector") classes 02.01-02.02: |

| | |
|--------------------|---|
| | <p>Class 02.01 Forestry and logging:</p> <ul style="list-style-type: none">- Growing of standing timber: planting, replanting, transplanting, thinning and conserving of forests and timber tracts- Growing of coppice and pulpwood- Operation of forest tree nurseries- Growing of Christmas trees- Logging: felling of timber and production of wood in the rough such as pit-props, split poles, pickets or fuel wood- Growing of vegetable materials used for plaiting <p>Class 02.02 Forestry and logging related service activities:</p> <ul style="list-style-type: none">- Forestry service activities: forestry inventories, timber evaluation, fire protection- Logging service activities: transport of logs within the forest |
| Impacts | <p>Ultimate outcomes of the EU FAP i.e. lasting effects of policy measures in the EU FAP</p> <ul style="list-style-type: none">- Expected impacts: Expected impacts are derived from the EU FAP general objectives: competitiveness, environment, quality of life and coordination, coherence and communication |
| Intervention logic | <p>the logic of how measures will lead and contribute to the targeted objectives</p> |
| Leading Actor | <p>refers to bodies implementing the EU FAP; Leading Actor is the responsible actor (i.e. the Commission, the Standing Forestry Committee and/or the Member States) for an EU FAP activity as defined in the EU FAP work programme 2007-2011</p> |
| Outputs (products) | <p>direct products or services which result from the activities of implementing the EU FAP</p> |
| Relevance | <p>the extent to which the EU FAP objectives are consistent with stakeholders' requirements, Member States' needs, global priorities and the Community policies</p> |
| Results (outcomes) | <p>effects and outcomes attributable to the EU FAP outputs</p> <ul style="list-style-type: none">- Expected results (outcomes): Expected results are derived from the EU FAP specific objectives that are defined by the Key Actions |
| Side-effects | <p>Unintentional effects caused by the implementation of the EU FAP</p> |
| Stakeholders | <p>individuals and organisations who are directly and indirectly affected by the implementation and results of the EU FAP – in the report the target group “stakeholders” refers to the members of the Advisory Group on Forestry and Cork included with other stakeholders targeted with the mid-term evaluation surveys</p> |

List of Abbreviations

| | |
|---------|---|
| AC-FBI | Advisory Committee on Community Policy regarding Forestry and Forest-based Industries |
| AFOLU | Agriculture, Forestry and Other Land Uses (UNFCCC) |
| AGFC | Advisory Group on Forestry and Cork |
| C&I | pan-European Criteria and Indicators for Sustainable Forest Management (MCPFE) |
| CBD | Convention on Biological Diversity |
| CIP-IEE | EU's Competitiveness and Innovation Framework Programme (CIP): Intelligent Energy – Europe |
| CITES | Convention on International Trade in Endangered Species of Wild Fauna and Flora |
| COFO | FAO Committee on Forestry |
| COP | Conference of Parties (UNFCCC) |
| COST | European Cooperation in Science and Technology |
| DG | Directorate General (Commission departments and services): DG AGRI DG Agriculture and Rural Development DG COMP DG Competition DG DEV DG Development DG EMPL DG Employment, Social Affairs and Equal Opportunities DG ENLARG DG Enlargement DG ENTR DG Enterprise and Industry DG ENV DG Environment DG ESTAT Eurostat, the Statistical Office of the EU DG MARKT DG Internal Market and Services DG REGIO DG Regional Policy DG RTD DG Research DG SANCO DG Health and Consumers DG TRADE DG Trade DG TREN DG Transport and Energy JRC Joint Research Centre SG General Secretariat |
| EAFRD | European Agricultural Fund for Rural Development |
| EEA | European Environment Agency |
| EESC | European Economic and Social Committee |
| EFDAC | European Forest Data Centre |
| EFFIS | European Forest Fire Information System |
| EFICP | European Forest Information and Communication Platform |
| EFMS | European Forest Monitoring System |
| ERDF | European Regional Development Fund |
| EU FAP | EU Forest Action Plan |

| | |
|---------|---|
| FAO | Food and Agriculture Organization of the United Nations |
| FBI | Forest-based Industries |
| FCN | Forest Communicators' Network (UNECE/FAO team of specialists) |
| FLEG(T) | Forest Law Enforcement, Governance (and Trade) |
| FP | Framework Programme FP6 / FP7 |
| FTP | Forest-based sector technology platform |
| | FTP NRA National Research Agenda |
| | FTP SRA Strategic Research Agenda |
| GPP | Green Public Procurement |
| ha | hectare |
| ISG | Inter-services' Group (Commission internal body) |
| LULUCF | Land use, land-use change and forestry (UNFCCC) |
| MCPFE | Ministerial Conference on the Protection of Forests in Europe |
| MS | EU Member State |
| NFP | national forest programme |
| NGO | non-governmental organisation |
| NWFGS | Non-wood forest goods and services |
| OMC | Open Method of Coordination |
| PP | Public Procurement |
| R&D | Research and Development |
| REDD | Reduced Emissions from Deforestation |
| RES | Energy from Renewable Sources |
| RD(P) | Rural Development (Programme) |
| RTD | Research and Technological Development |
| SBSTA | Subsidiary Body for Scientific and Technological Advice (UNFCCC) |
| SEIS | Shared Environmental Information System |
| SFC | Standing Forestry Committee |
| SFM | Sustainable Forest Management |
| UN | United Nations |
| UNCCD | Convention to Combat Desertification |
| UNECE | United Nations Economic Commission to Europe |
| UNFCCC | Framework Convention on Climate Change |
| UNFF | United Nations Forum on Forests |

Member State abbreviations

| | |
|----|----------------|
| AT | Austria |
| BE | Belgium |
| BG | Bulgaria |
| CY | Cyprus |
| CZ | Czech Republic |
| DE | Germany |
| DK | Denmark |
| EE | Estonia |
| EL | Greece |
| ES | Spain |
| FI | Finland |
| FR | France |
| HU | Hungary |
| IE | Ireland |
| IT | Italy |
| LT | Lithuania |
| LU | Luxembourg |
| LV | Latvia |
| MT | Malta |
| NL | Netherlands |
| PL | Poland |
| PT | Portugal |
| RO | Romania |
| SE | Sweden |
| SI | Slovenia |
| SK | Slovakia |
| UK | United Kingdom |