

Revising the FTP Key Documents

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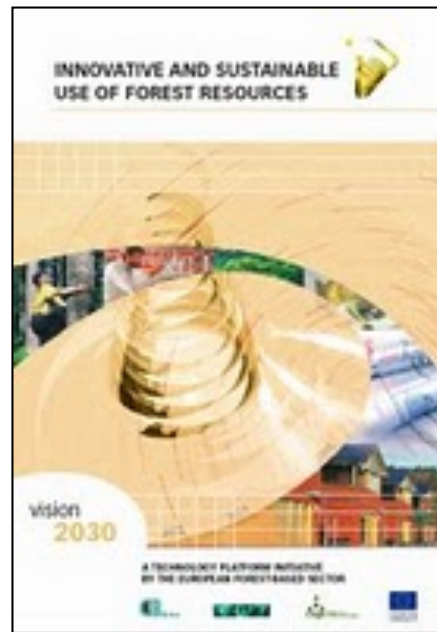
Outline of the presentation

- Purpose of the Key Documents
- Why revision of Key Documents
 - Operational changes
 - Opportunities for FBS
- Horizon 2020
- Vision and its structure
- Revision process of the SRA
- Summary



FTP Key Documents = Vision 2030 & Strategic Research Agenda

Vision 2030 (launched in 2005)



Strategic Research Agenda (launched in 2006)



Purpose of FTP Key Documents

- Encouraging industry to joint R&D and to renew its operations
- Agreeing research funding priorities between industry, researchers and policy-makers
- Enabling more ambitious targets for research & innovation efforts
- Reduce fragmentation and overlaps in Europe



Existing Vision has been excellent, however...

- Modifications in SRA needed
 - Set more ambitious and concrete targets to the vision for renewing the forest-based sector
 - Address the changes and structure of Horizon 2020
 - Re-focus and re-structure the vision
 - Set Vision Targets and up-date the SRA accordingly



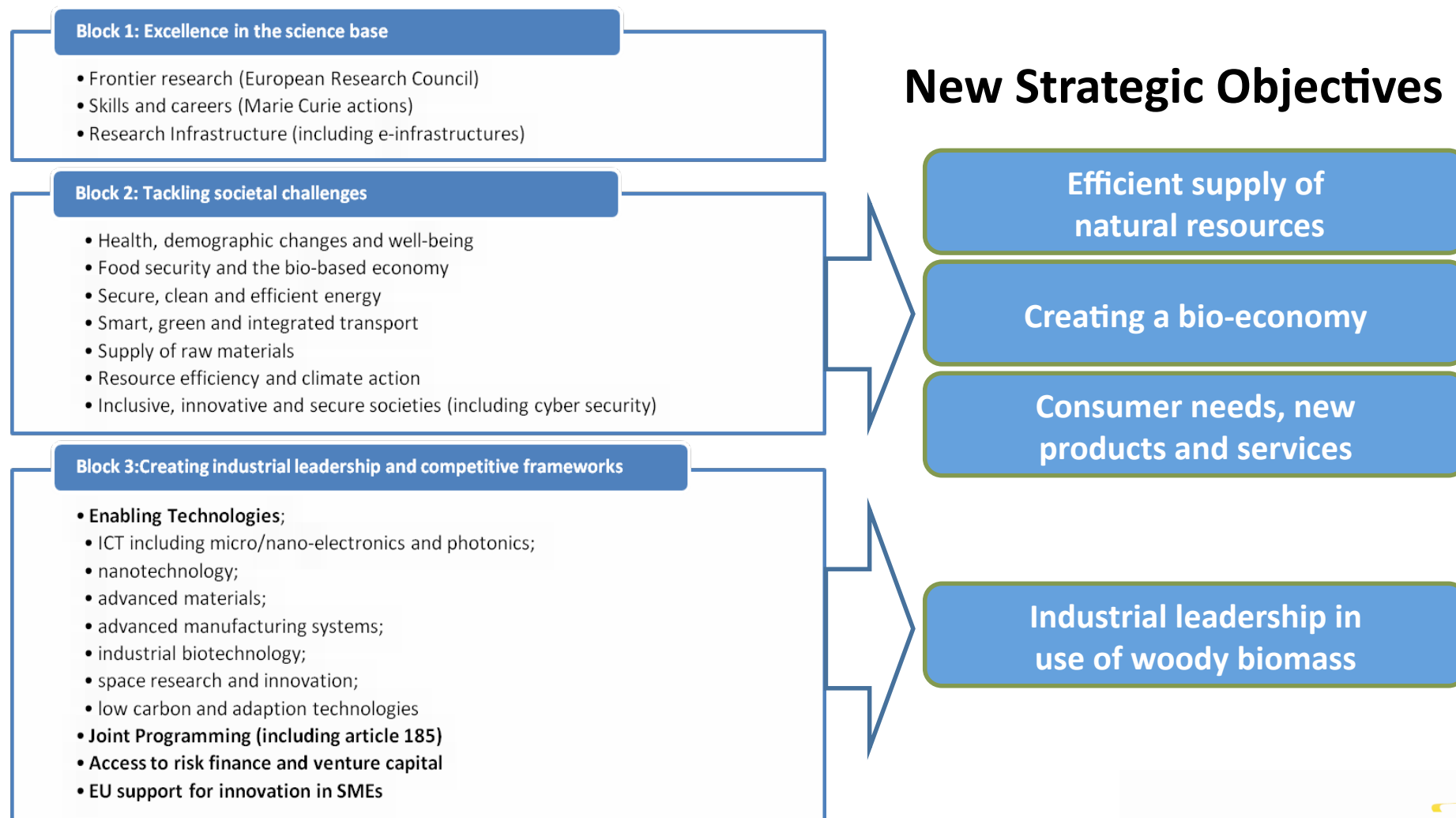
Changes in business environment since 2006

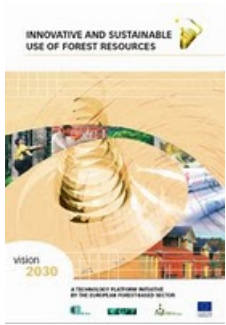
- EU's climate and energy policy directive – binding targets set on member countries
 - Energy efficiency demands
- Customer demands are changing
- Adaptation to the horizon 2020

Opportunities created for FBS

- Building of bio-economy on the eco-efficient use of forest resources
- Bio-refineries for green energy, bio-fuels and chemicals
- New products and business concepts based on
 - Smart packaging solutions, new material solutions and media integration
- Increased use of wood in building and living
- Improved energy efficiency
 - Process solutions, low carbon products and substitution of non-renewable materials
- Leading role in the development of bio-economy

The Block structure of the next EU research and innovation budget, Horizon 2020





Revised FTP Vision structure

New Strategic Objectives

Efficient supply of natural resources

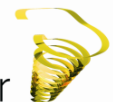
Creating a bio-economy

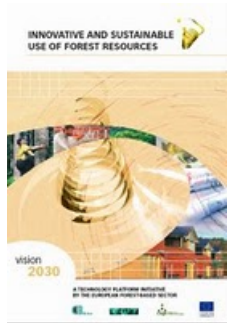
Consumer needs, new products and services

Industrial leadership in use of woody biomass

“Driving forces”

- 1. Sustainable and secure raw material access*
- 2. The need of society*
- 3. The need of the consumers*
- 4. Renewal of the industry*



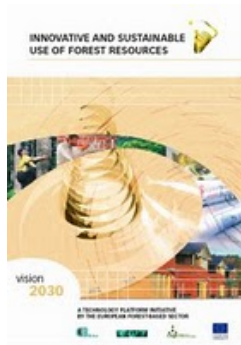


Revised FTP Vision document

Aiming for a 5 pages document that tells a good story

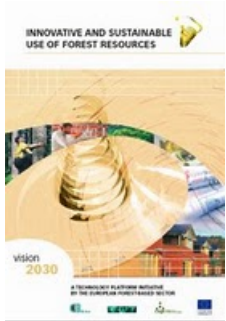
- 1. The importance of the Forest-Based Sector in Europe and the vision statement*
- 2. Tackling the societal challenges (addressing “block 2” in the next EU research budget)*
- 3. Creating Industrial leadership (addressing “block 3” in the next EU research budget)*
- 4. 2030 Vision Targets 2030*





FTPs vision statement (launched in 2005)

- *“The European forest-based sector plays a **key role in a sustainable society.***
- *It comprises a **competitive, knowledge-based industry** that fosters the extended use of renewable resources.*
- *It strives to ensure its **societal contribution** in the context of a **bio-based, customer-driven and globally competitive European economy.**”*



Revised FTP vision statement

draft

- *Forest-based sector is a **global leader of bio-based economy**. It delivers society eco-efficient products and services ranging from forestry and wood products to paper, green energy and bio-fuels and chemicals*
- *The Forest based-sector has doubled the added value of its products and services by 2030*
- *The basis for the development has been a smart and sustainable use of the renewable forest resources*





Revision process of SRA

Decision making

- **Revision Steering Group makes the decisions**
 - Markku Karlsson (UPM), Bernard de Galembert (CEPI), Filip de Jaeger (CEI-Bois), Martin Lindell (EUSTAFOR), Aljoscha Reiquart (CEPF) and Johan Elvnert (FTP)
- **The FTP High-Level group gives the formal approval for the revision and its timetable**
- **Project Manager Johan Elvnert**



Revision process of SRA

Working groups

– SRA writing team

- Kari Edelman (Chief editor), Niklas von Weymarn (VTT), Gert-Jan Nabuurs (EFI), Kaj Rosen (Skogforsk), Knut Kappenberg (Sonae), Werner Förster (PTS)
- **Value-Chain Teams backing up the writing team**
(Industry driven complemented with key research representatives example the FTP Biorefinery Task Force)
- **Input from National Support Groups and the Advisory Committee crucial**

Re-structuring the SRA

Efficient use of natural resources

- Trees for the future
- Paper recycling
- Recycling wood products
- Forest ecosystems
- Adapting forests to climate change
- Instruments for good forest-sector governance

Consumer needs, new products and services

- A new generation of functional packaging
- Paper as partner in communication
- Advancing hygiene and health care
- New generation composites
- Commercialising soft forest values
- Citizens' perception

Creating a bio-economy

- Living and building with wood
- Moving Europe with bio fuels
- Green specialty chemicals
- Tech. to boost heat & power output
- Forest for multiple needs
- Assessing the overall performance of the sector

Industrial leadership in use of woody biomass

- Tailor made wood supply
- Wood bio-refinery...
- Re-engineering the fibre-based value chain
- More performance from less...
- Reducing energy consumption...
- Advanced tech for primary wood processing
- New manufacturing technologies for wood products



SRA revision timetable

- First draft in Dec 2011
 - Redraft in Mar 2012
 - Final draft in May 2012
 - Revised SRA to be printed in Jun 2012
- Input from NSGs
- Input from NSGs
-

FTP - conclusions

- Forest-based sector is revising its Vision 2030 and strategic research agenda to meet better the changes in the operational environment
 - Control of climate change, changing customer demands and needs in Horizon 2020
- Forest-based sector will lead the sustainable development in Europe and take necessary actions to change FBS from resource to knowledge-intensive direction.
- Forest-based sector will provide bio-based products, green energy, raw materials to substitute non-renewable materials and low energy solutions for society

Thank you for your attention!