

2010

2015

2020

2025

2030

Forest-Based Sector
Technology Platform



Contribution of the German National Support Group

From Vision to Reality –
Implementing the Strategic Research Agenda
Gumpenstein / Admont
2nd and 3rd May 2006

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The German Forest-Wood-Cluster

Basic figures on forestry, wood, pulp and paper:

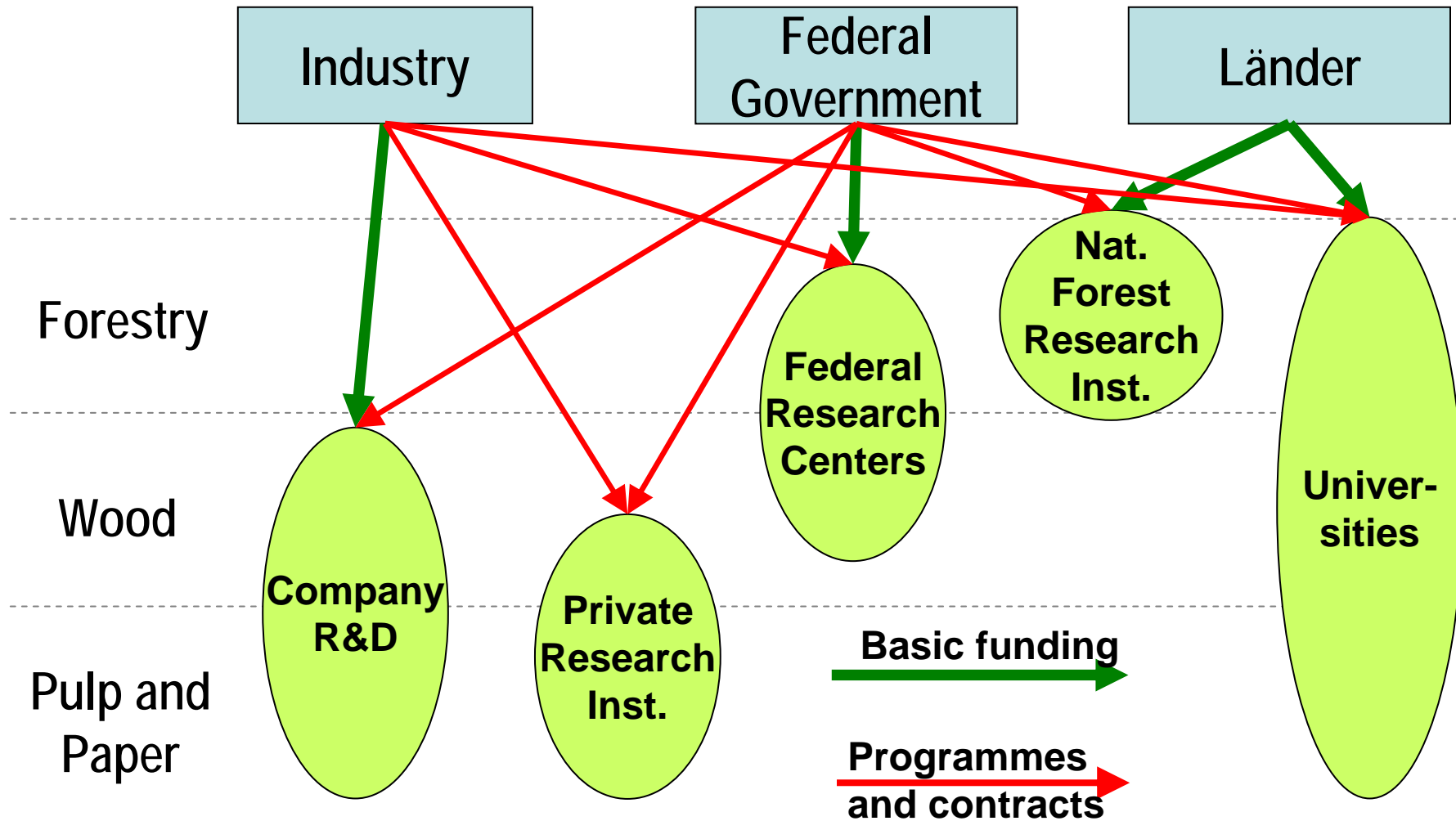
- ▶ 185.000 enterprises
- ▶ 1.3 million employees (3.4% of total employees)
- ▶ 181 billion € turnover
- ▶ 2 million forest owners
- ▶ 54 million m³ annual fellings (2004)
- ▶ 4.000 – 5.000 employees in R&D (estimate)

Ref.: ¹⁾Mrosek et al., 2005, ²⁾Fed. Statistical Office of Germany

³⁾Stifterverband für die Deutsche Wissenschaft, 2004

⁴⁾Roeder&Thoroer, 1997 ⁵⁾ COST inventory, 2003

Research structures in the Forest-based Sector in Germany



National (Research) Programs in the Sector

- ▶ „Nachhaltige Waldwirtschaft“ (Sustainable Forest Management)
- ▶ „Charta für Holz“ (Charta for wood)
- ▶ “Renewable Resources”
- ▶ INFOR (paper industry fund)
- ▶ Collective research fund (AiF) dedicated to wood, paper and printing sector

National (Research) Programs in the Sector

„Nachhaltige Waldwirtschaft“ (Sustainable Forest Management) 2004-2008

- ▶ Federal Ministry of Education and Research (BMBF)
- ▶ Funding of trans-disciplinary R&D
- ▶ *Research areas:*
 - Scenarios and visions for the forest- and wood-industry
 - Sustainable management and development of forests
 - Value-added potentials along the forest-wood supply chain



National (Research) Programs in the Sector

„Charta für Holz“ (Charta for wood) 2002



- ▶ *Goal:* increase wood consumption in Germany by 20% in 10 years
- ▶ *Measures:*
 - Enhance demand for wood
 - Optimise wood supply
 - R&D: „Nachhaltige Waldwirtschaft“ (Sustainable Forest Management)
 - Implementation – management

National (Research) Programs in the Sector

„Renewable Resources”

(administered by FNR – Agency of Renewable Resources)

- ▶ Federal Ministry of Food, Agriculture and Consumer Protection (BMELV)
- ▶ Co-operative R&D and demonstration projects
- ▶ Some Research Areas
 - Natural Fibres (utilisation in textiles, paper, insulation, fibre-reinforced material, ...)
 - Lignocellulosics / Wood (“green” chemicals, wood in construction, ..)
 - Bioenergy, BTL, ...



National (Research) Programs in the Sector

INFOR Research Fund

- ▶ Research Fund of the German Pulp and Paper Association (vdp)
- ▶ Collective research projects for **quick application**
- ▶ Some Research Areas
 - Resource efficient production (Energy, Fibres, Water)
 - Feasibility studies on new technologies
 - Process enhancements



National (Research) Programs in the Sector

Collective research fund (AiF)
dedicated to wood, paper and printing sector



- ▶ Federal programme for collective R&D for the specific **benefit of SMEs**
- ▶ Organised by sector specific Research Associations (wood, pulp and paper, printing)
- ▶ Implemented by public and private research institutes in cooperation with companies
- ▶ Topics defined by industry led committees

Examples of Research topics from the German NSG

▶ Forestry

- Multi-functionality under changing framework conditions
- Climate change
- Economic viability of forest enterprises

▶ Wood

- Optimization of Logistic Chains
- Wood based compound materials
- Energetic optimization of buildings by using wood based elements

▶ Pulp and Paper

- Paradigm shift for optimal utilisation of recovered paper
- Enhanced material-machine-costumer communication for printing paper and print product manufacture

▶ Bioenergy

- Assessment of available potentials of raw materials

Activities of the GNSG in the implementation phase

- ▶ **Integration** of Stakeholders
 - SMEs, forest owners, media, politics, ...
 - Scientific community
 - Industry (Bioenergy, Mechanical Engineering, Chemical Industries,...)
- ▶ **Prioritisation** of topics from German point of view (lobbying of topics in Brussels)
- ▶ Active contact and **networking** with other Technology Platform National Groups
- ▶ **Facilitating** of project and consortia forming

Support by the Federal Government

Motivation for Support:

- Structuring effect and inter-sectoral networking
 - Europeanisation of research and economic activities
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- ▶ Financial support of the GNSG (organisation, management, information and networking activities)
 - ▶ Networking with ERA-Net WoodWisdom-Net
 - ▶ Consultation of GNSG when designing research programs

Don't say you're overworked

