



Appendix 3



ROBIN WOOD PROJECT

COMPONENT 3: OPTIMISED FORESTRY DEVELOPMENT

REGION OF MURCIA FORESTRY SWOT

1. BIODIVERSITY

WEAKNESS	THREATS
<ul style="list-style-type: none"> - Lack of resources (money, staff) for the forest management. - The legislation about forest management is not fully Developer yet. - Almost 70% of forest areas are private. It makes conservation policies application to slow down. 	<ul style="list-style-type: none"> - Fires and diseases are a real threat to forest resources and biodiversity. - Urban and tourist sprawl put pressure on forest areas and sometimes makes them disappear.
STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> - High biodiversity richness and a lot of endemic species. Murcia has more than 20% of the habitats considered as "of European interest" and more than 15% of the wild endemic species of the European peninsula and a great diversity of landscapes. - High economic, recreational, educative and scientific potential of the forests. - There is a "<i>Regional strategy for the conservation and sustainable biodiversity use</i>". - There is a "<i>Catalogue of the protected wild flora</i>" which 5 different level of protection. 	<ul style="list-style-type: none"> - The existence of a national strategy and an international agreement about biodiversity builds a framework for regional actions and the development of plans for different sectors. - There is an increasing interest about the forests and its conservation. - The involvement of private forest owners to sustainable development plans World increase the protection level and World make easier the public administration work.

STRATEGIES

Biodiversity	STRENGTHS	WEAKNESS
OPPORTUNITIES	<p>Re-Orientation Strategies :</p> <ul style="list-style-type: none"> - To develop plans to Protect the biodiversity directed to different sectors to different economic sectors. - To develop sensitising policies. - To stimulate the sustainable management in private forests. 	<p>Offensive Strategies:</p> <ul style="list-style-type: none"> - To involve private owners in the public programs of forest management. - To develop completely the legislation about forests.
THREATS	<p>Survival strategies:</p> <ul style="list-style-type: none"> - To promote the knowledge about the richness of Murcia's forests. -To incorporate in all politic issues guidelines of sustainable management. 	<p>Defensive Strategies:</p> <ul style="list-style-type: none"> - To promote the public ownership or the consortium private/public. - To increase the resources to combat fires, diseases and other threats for biodiversity.

2. CERTIFICATION

WEAKNESS	THREATS
<ul style="list-style-type: none"> - There is not certification of production in the private sector. - Lack of knowledge, among the private owners, about the certification systems. - Lack of interest for innovation among the small private owners. - Poor development of certification issues in the public sector. 	<ul style="list-style-type: none"> - Low activity in private forests (management, exploitation...). This causes low interest in certification processes. - Reluctance to changes in the management systems. - There is not a development of national guidelines for the application of certification systems in forests.
STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> - Sierra Espuña (a Regional park in Murcia) has become the first Regional park to get the certification in Spain. This provides experience about the development of certification. 	<ul style="list-style-type: none"> - Certification systems are being spread out in Spain. - The public opinion is sensitized about the sustainability if the resources use. Ecologic certification is "a good deal". - There are European subsidies for the development of forest activities in rural areas.

STRATEGIES

Certification	STRENGTHS	WEAKNESS
OPPORTUNITIES	Re-orientation Strategies: <ul style="list-style-type: none"> - To spread the certification to other protected areas in Murcia. - To make informative campaigns about the products from certified forests. 	Offensive Strategies: <ul style="list-style-type: none"> - To give subsidies for the development of certification systems in private forests. - To promote innovative actions in private forests.
THREATS	Survival strategies: <ul style="list-style-type: none"> - To develop certification in public forests so that it become an example for private owners. - To provide technical support to private owners in certification processes. 	Defensive Strategies: <ul style="list-style-type: none"> - To make compulsory, on the long term, certification in order to allow exploitation of resources in private forest areas. - To work on guidelines for forest certification.

3. DEVELOPMENT OF THE FOREST SECTOR

WEAKNESS	THREATS
<ul style="list-style-type: none"> - Lack of data available about the supply of products from the forest sector to enterprises of other economic sectors. - First transformation activities are not working in the Region. It makes forest sector to be dependant on imports. - Some species that provide good quality wood for the industry can't be produced in Murcia. - Most of the enterprises are very small- - Imports and exports are very concentrated in few countries. - Certified wood is weakly Developed. - Training level in forest issues is still very low. - The enterprises are not gathered in a purchasing office in order to negotiate better prices. 	<ul style="list-style-type: none"> - Sawmills must compete with much cheaper ones in other countries. - The World demand of wood is decreasing (use of other materials). - Raw materials are expensive because they come from Developer countries with high incomes.
STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> - Forests become a very important economic resource in rural areas. - Furniture sector is very important in the region, with a much diversified production and high innovation capacity. - There is a master degree on Technologies for the furniture sector at the university of Murcia. - There is abundant raw material (but from few species). - The industrial sector of pallet building is very traditional in Murcia. 	<ul style="list-style-type: none"> - The increase of the demand on ecological, fair trade... products makes wood be appreciated by consumers. - There are important trade relations with specific countries as France, Portugal, USA, Germany that can be strengthened.

STRATEGIES

Development of the forest sector.	STRENGTHS	WEAKNESS
OPPORTUNITIES	Re-orientation Strategies : <ul style="list-style-type: none"> - To promote the certification of forest products in order to increase exports. - To promote education and training activities in order to increase productivity. - To include activities in forests into rural development programs. - To bet on quality in exportation products. 	Offensive Strategies: <ul style="list-style-type: none"> - To make a study about the supply chain in the forest sector in Murcia. - To promote the regional supply chain to strength first transformation activities and reduce costs and imports. - To promote certification of forest products to be adapted to the new demands from consumers - To improve productivity in small enterprises with the horizontal integration of activities. - To search for new markets.
THREATS	Survival strategies : <ul style="list-style-type: none"> - To promote certification as a way of compensate the decrease of the demand of "classic" wood. - To Foster the quality and the innovation as "Added values" to compete with other countries with lower costs. - To use wood from forest management activities (pruning, forest clearance...) in the supply chain in the wood industry. 	Defensive Strategies : <ul style="list-style-type: none"> - To foster innovation and productivity of sawmills. - To increase productivity to decrease production costs and then increase exports. - To foster a purchasing office in order to negotiate better prices.

4. DEVELOPMENT OF OPPORTUNITIES NOT LINKED TO THE WOOD INDUSTRY IN FORESTS.

WEAKNESS	THREATS
<ul style="list-style-type: none"> - Non timber forest production is very variable on time. - There is no data available about mining activities on forests. - The wind power resources are not developed in the forest areas. - The certification of non timber products is not Developer. - Specific problems (death of bees) in forests. - Lack of labour force for some activities. - Non timber activities not developed. - Lack of clearance activities and other management Works in forests are not developed. 	<ul style="list-style-type: none"> - Competition with other substitute products. - Competition with other geographical areas (Asia) that make prices decrease.
STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> - There is a constant annual production of forest remains (from forest management works) that can be used in energy production. - Forests are more than the 40% of Murcia total area, with 7 regional parks, 50 Sites of Community Interest and 22 SPA, with a strong recreational potential. - Murcia has a strong potential for the production of high quality, non timber, products. - Increase of the tourist interest for forest areas in Murcia. - There is an ancient tradition of essence production (for example - for perfume). 	<ul style="list-style-type: none"> - The increase of tourism can stimulate sales of non timber products. - Increase of demand of natural, ecological products. - Current promotion of renewable energies.

STRATEGIES

Non timber development	STRENGTHS	WEAKNESS
OPPORTUNITIES	Re-orientation Strategies: <ul style="list-style-type: none"> - To foster management activities for maintaining forests in a suitable condition that leads to a sustainable development, protection and biomass use. - To develop the recreational potential of forests. - To promote the active nature tourism. 	Offensive Strategies: <ul style="list-style-type: none"> - To foster and support the constitution of enterprises for the production of non timber products in forest areas (honey, essences...) - To foster certification of non timber products and develop the guidelines and legislation about it. - To set maintaining programs in forests.
THREATS	Survival strategies: <ul style="list-style-type: none"> - To foster the certification of non timber products and other uses in forest areas to overcome the competition on prices. 	Defensive Strategies: <ul style="list-style-type: none"> - To promote certification of products to compete with products of other areas. - To include non timber products in the tourist activities.

5. FORESTRY PLANNING & MANAGEMENT

WEAKNESS	THREATS
<ul style="list-style-type: none"> - Lack of resources (money, staff) in the public administration to deal with all the necessities of the environment. - It is difficult to develop sub-regional forest (either private or public) management projects. - The delay in the development of programs, projects, etc. causes the lack of a suitable legal framework for the forest management. - Lack of sub-regional forest planning. - High decrease in the maintaining Works made in forest areas (like pruning and clearances). - Forests are mainly private. - Population is decreasing in rural areas. - Traditional activities, as cattle-raising and use of firewood are being abandoned. 	<ul style="list-style-type: none"> - The number of forest fires is increasing. - The lack of conservation Works on forests increases fire risk. - Serious erosion processes, especially in open forests, non wooded forests (just shrubs) or slope-cultivated areas. It causes soil loses, fertility decreases, landslide, dam filling, floods... - The decrease in the non wooded forest area leads to loss of biodiversity, and thus increasing soil erosion risk. - Climatic change, drought. - Diseases and droughts make forests be weaker and less attractive for tourist activities.
STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> - Forest (wooded) area is increasing. - Regional forest legislation is on progress. - From 1989 regional administration is developing agreements with private owners about forest management plans. - Expertise in the development of models, and assessments. - Decrease in total area affected by forest fires. - Many forests are protected areas. - Broad experience in forest and hydro geological restoration and combating desertification. 	<ul style="list-style-type: none"> - Increase in the interest that politicians, associations and general public have about protecting and development of the nature areas. - The use of forest resources is still very low. - The demand of recreational activities is increasing and then more and more people are visiting forests. - There are European subsidies that could be used for the development and use of forest resources in rural areas. - There are European subsidies (for management and wildlife protection) available for those private owners who have some Natura 2000 areas in their forests.

STRATEGIES

FORESTRY PLANNING & MANAGEMENT	STRENGTHS	WEAKNESS
OPPORTUNITIES	<p>Re-Orientation Strategies:</p> <ul style="list-style-type: none"> - Development of forest management models, specific for each area, at a sub-regional level. - Increase in the use of forest resources in rural areas to increase incomes and combating rural unemployment. - Development of revitalisation programs for rural areas that include recreational and cultural uses. - To develop specific guidelines to manage and preserve protected areas in forests. - To develop supporting and compensating measures for the private owners with protected areas in their forests. 	<p>Offensive Strategies:</p> <ul style="list-style-type: none"> - To increase economic subsidies to management programs in private forests, and to set technical advice for the development of these projects, and those related to preservation of protected areas in private forests. - To foster private owners (with economic subsidies) to include their forests in sub-regional programs of fire prevention. - To recover traditional activities in rural areas by including them in the sustainable management models.
THREATS	<p>Survival strategies :</p> <ul style="list-style-type: none"> - To set a suitable legal framework for the sustainable management of forests, including the development of the Regional forest law, this should give priority to the conservation and revitalization of forests areas. - Development of sub-regional planning to prevent forest fires. 	<p>Defensive Strategies:</p> <ul style="list-style-type: none"> - To increase technical staff in the public forest administration. - To set a monitoring program about trees diseases. - To develop studies about the energetic use of forest biomass. - To increase rural employment with forest clearance Works in order to prevent fires and to use the residues to produce energy. - To set specific actions to preserve biodiversity richness in the Murcia forests.