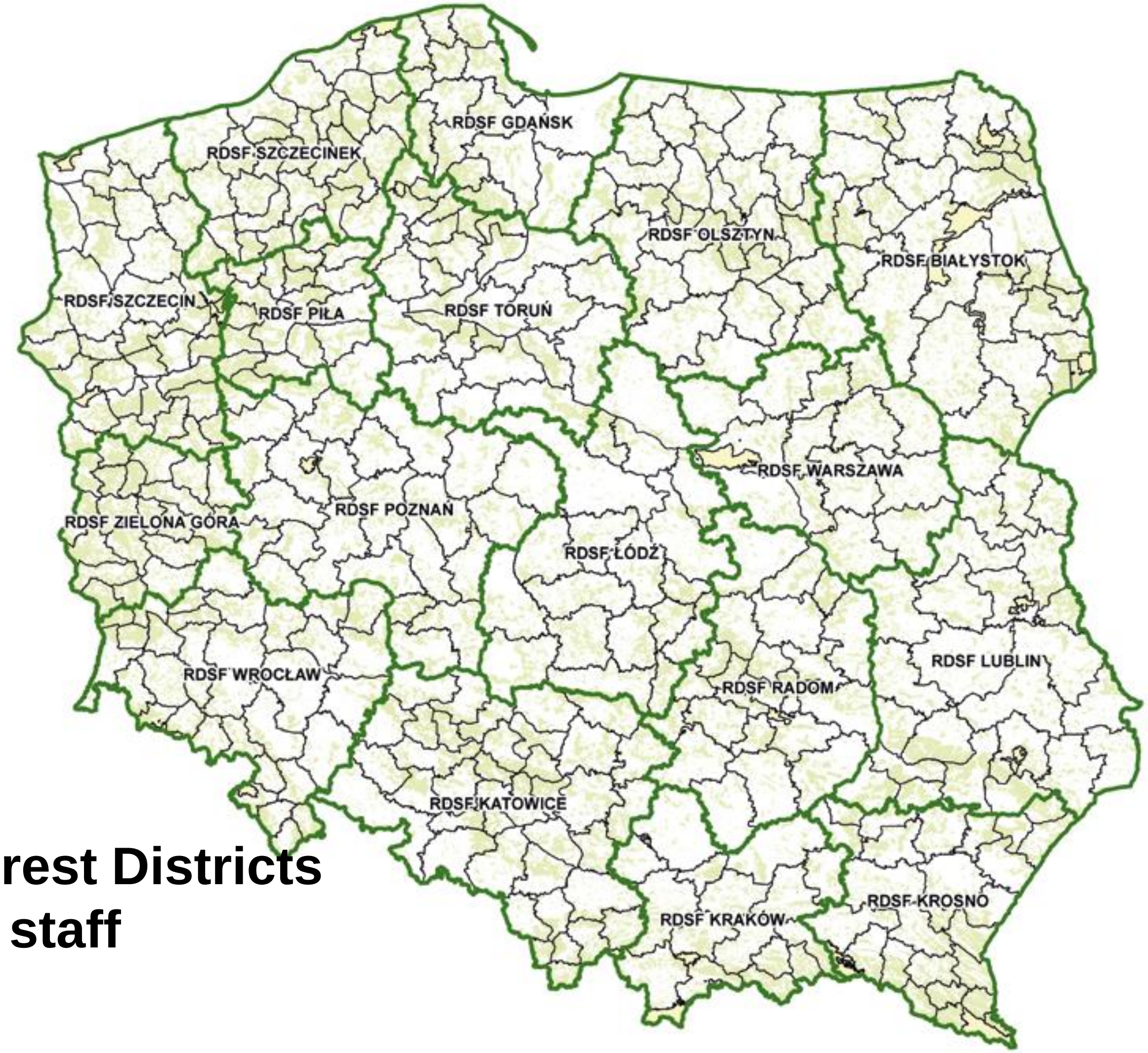
Państwowe Gospodarstwo Leśne
Lasy Państwowe

Regional Directorate of State Forest Gdańsk

Gdańsk 2013

Some informations about State Forest in Poland

- The State Forests National Forest Holding is an organization protecting, utilizing, and shaping Poland’s forests for over eighty years.
- SF manages publicly owned forests on behalf of the Polish State Treasury.
- SF does not have legal personality
- Their area exceeds 7.5 million hectares.



- **17 RDoSF**
  - **430 Forest Districts**
  - **24 798 staff**

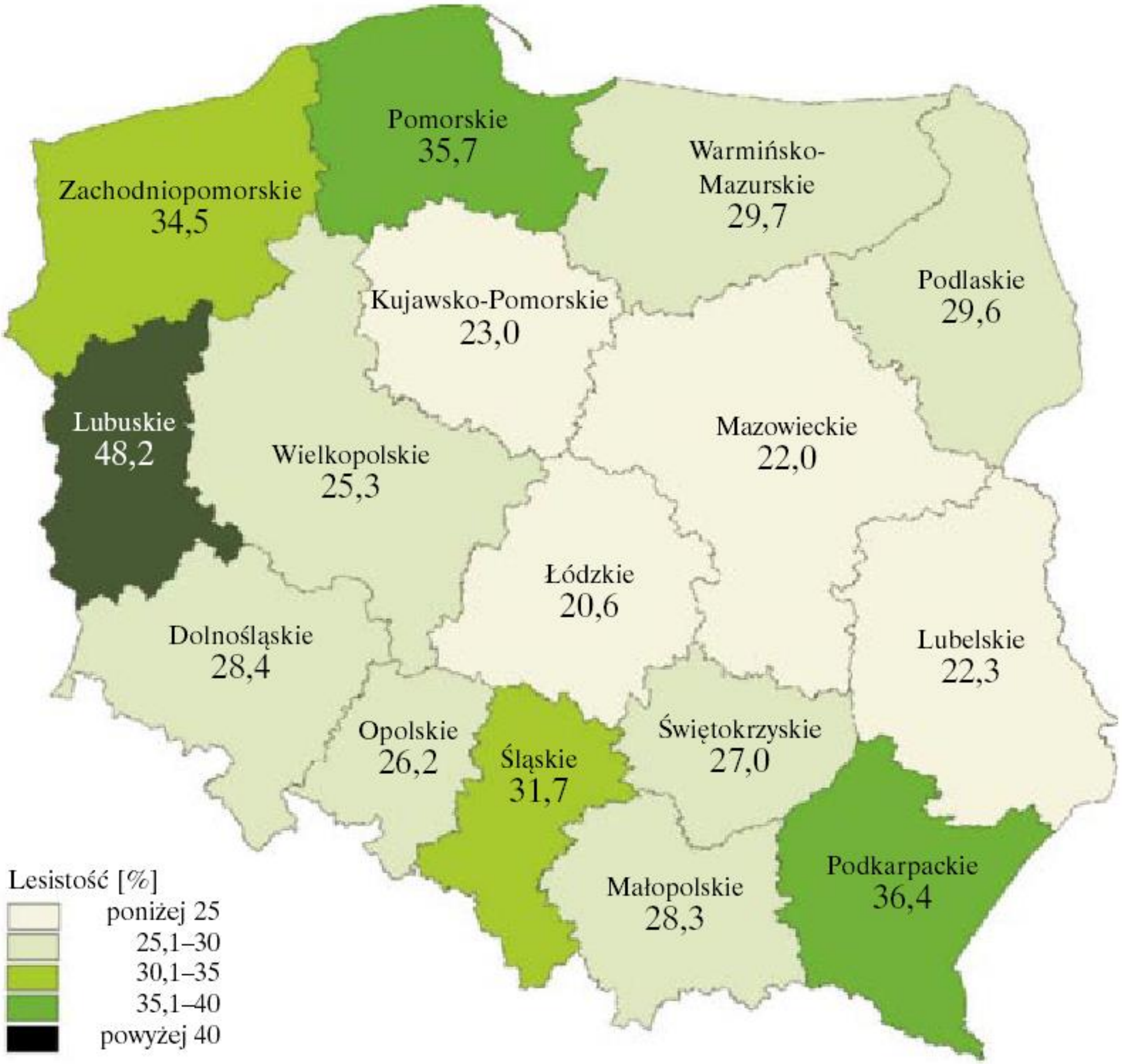
Some information about State Forest in Poland

- The State Forests is responsible for management, on a self-financing basis, of all state-owned forests, with the exception of national parks, land under the administration of Agricultural Property Agency.

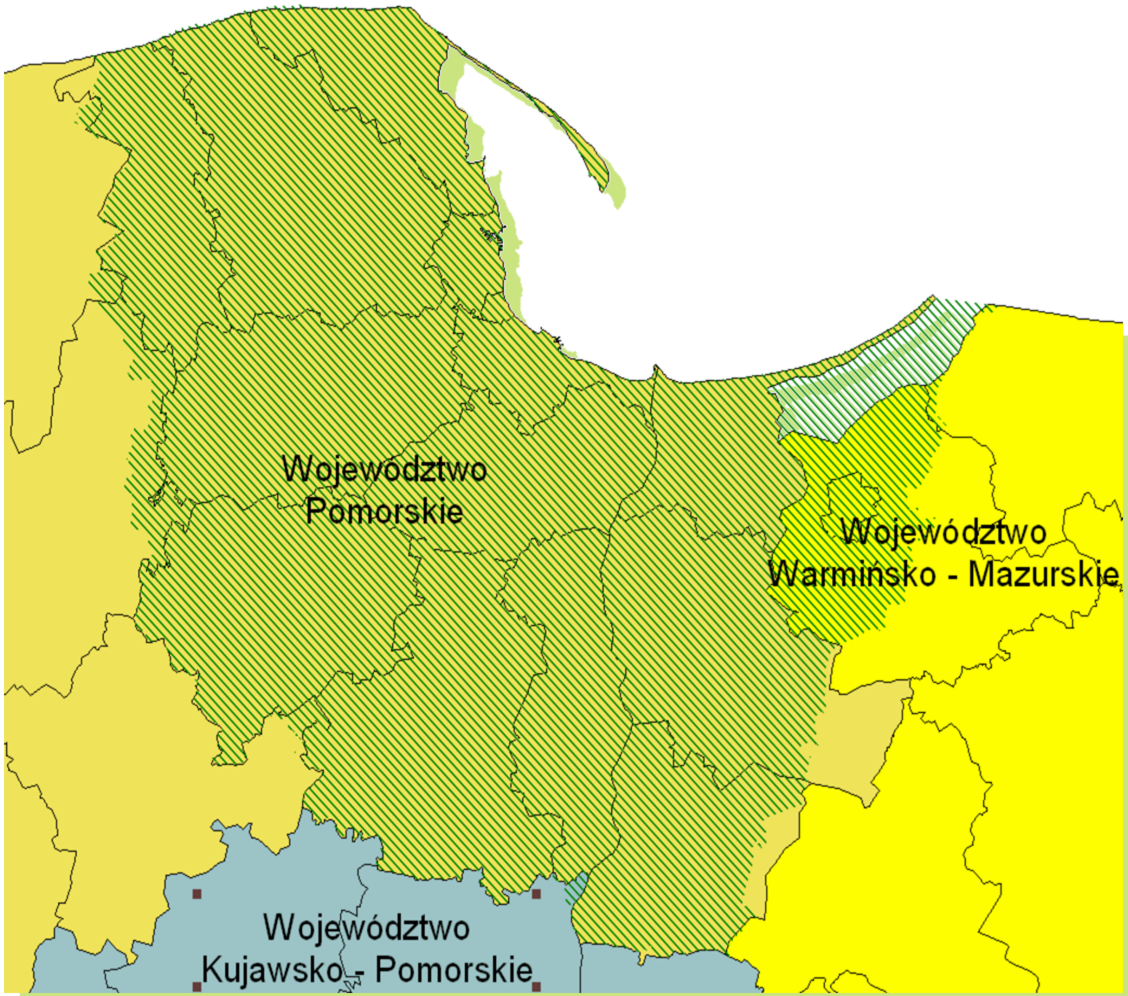
State Forest aims are to manage forests according to the principles of universal protection of forests, their sustainable maintenance, continuity and sustainable use of all forest functions and the increase of forest resources

Państwowe Gospodarstwo Leśne
Lasy Państwowe

Forest coverage of Poland according to provinces



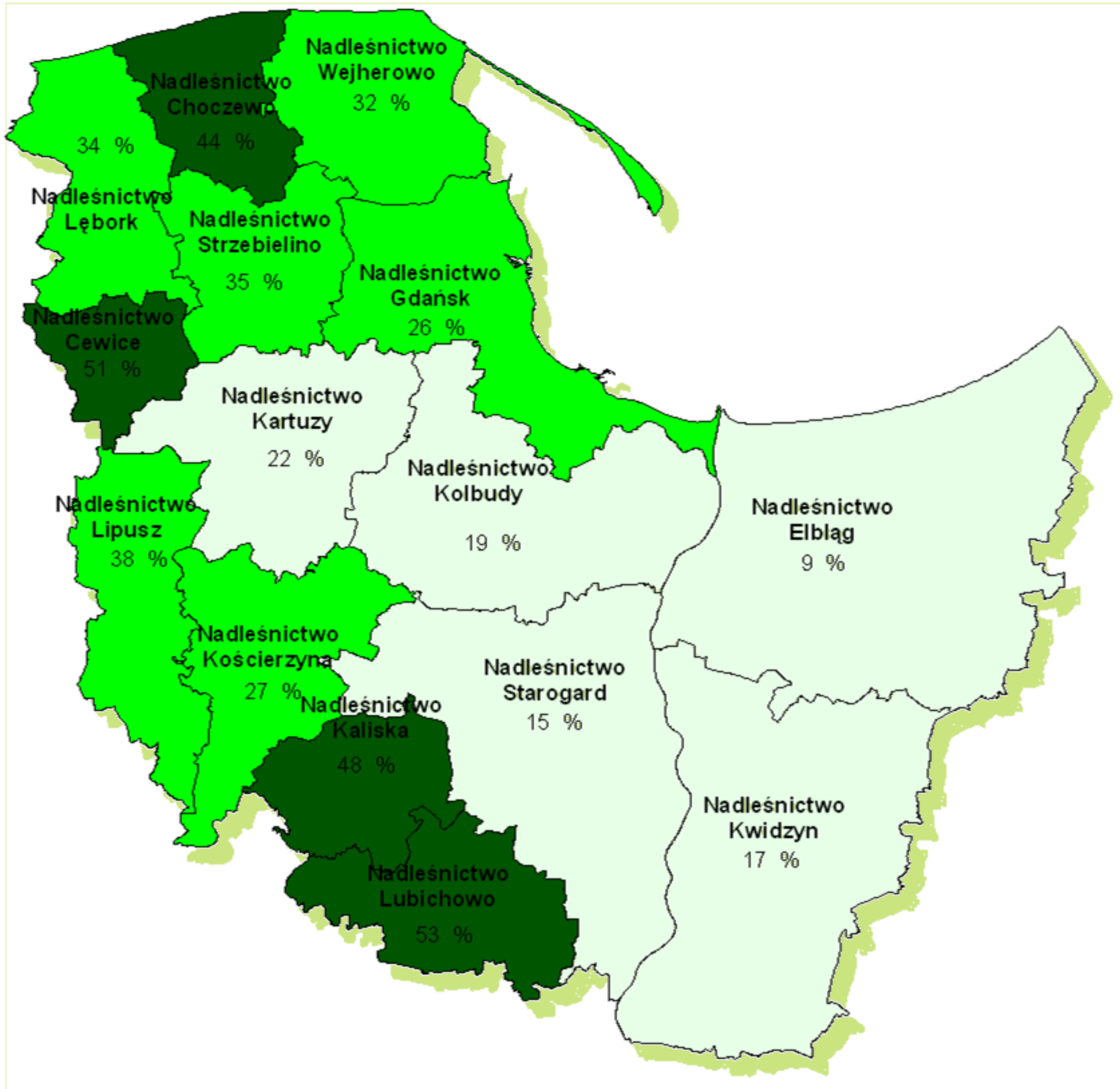
RDoSF Gdańsk



Province	*Administration range of RDoSF Gdańsk*	*Surface of administration RDLP Gdańsk*
Pomorskie Province	1 077 528 ha	291 387 ha
Warm-Maz Province	84 448 ha	12 713 ha
Kuj-Pom Province	1 145 ha	232 ha
Total	***1 163 121 ha***	***304 332ha***

RDoSF Gdańsk is located in
3 provinces comprising
22 counties
i 104 communities.

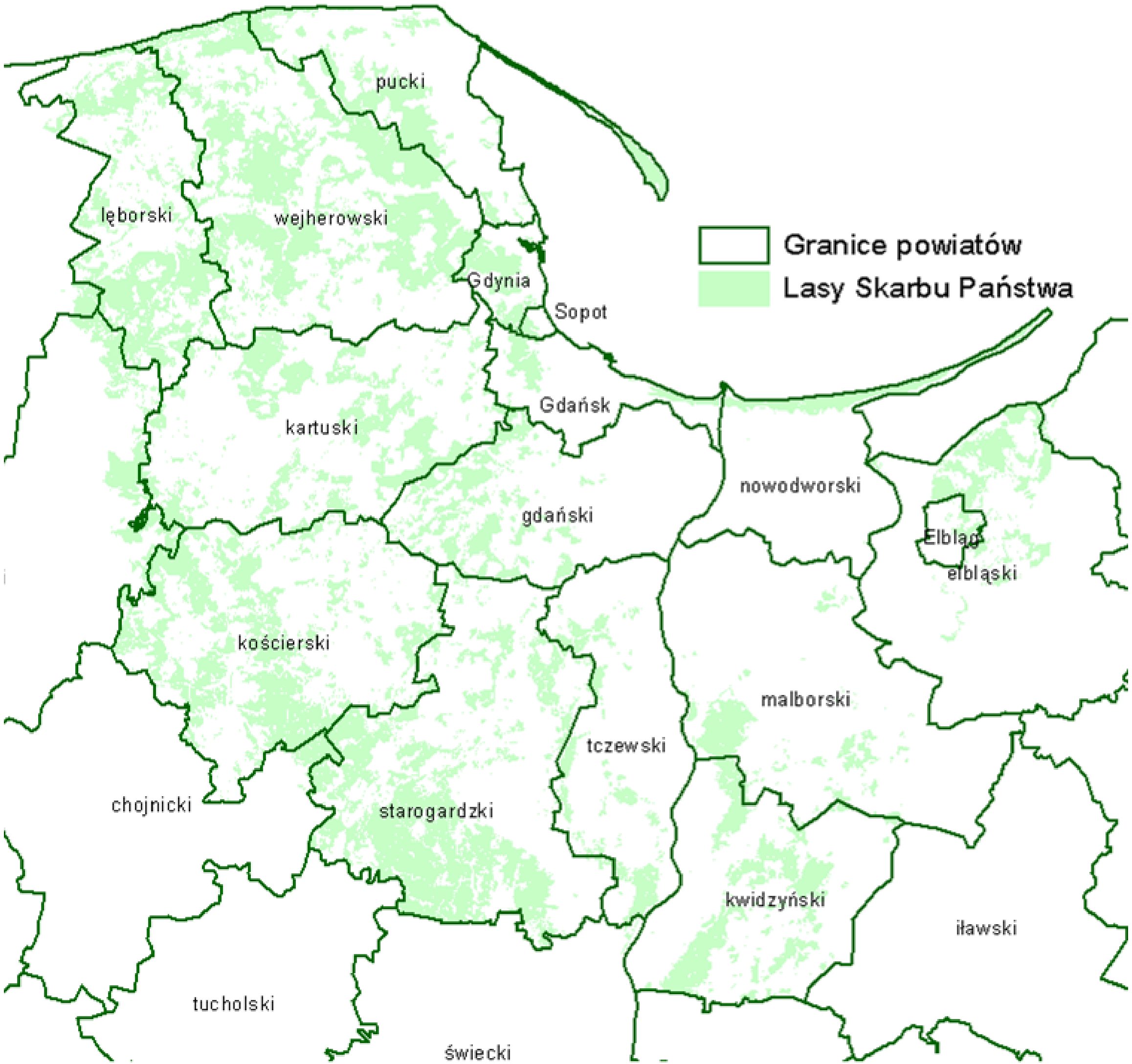
RDoSF Gdańsk



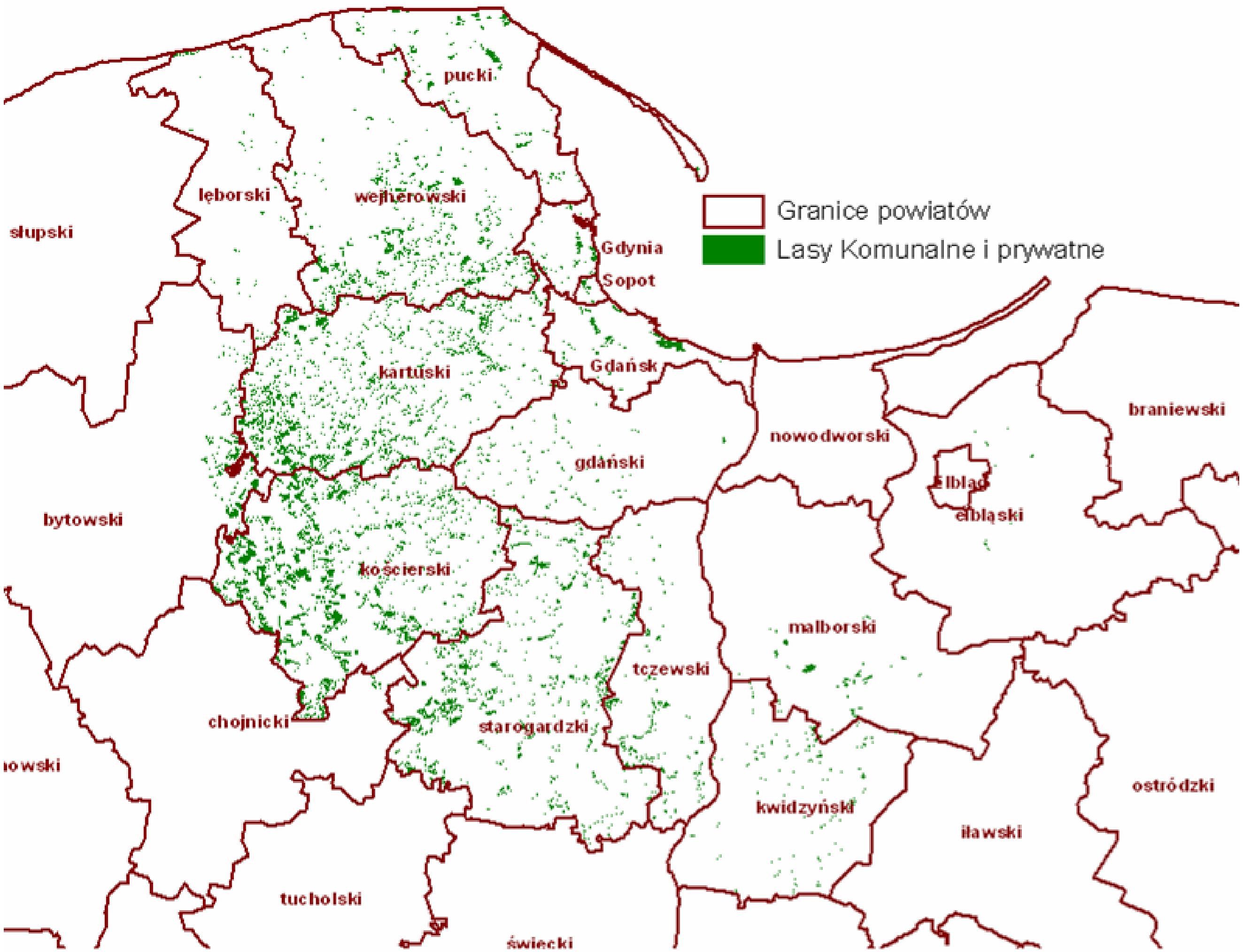
- Territory range 1 163 121 ha
- Total surface 304 332 ha
- Forest surface 293 209 ha
- 15 forest divisions
- 222 forestry districts
- Forest cover 29%

Państwowe Gospodarstwo Leśne Lasy Państwowe

State owned forests in the Gdańsk RDoSF range

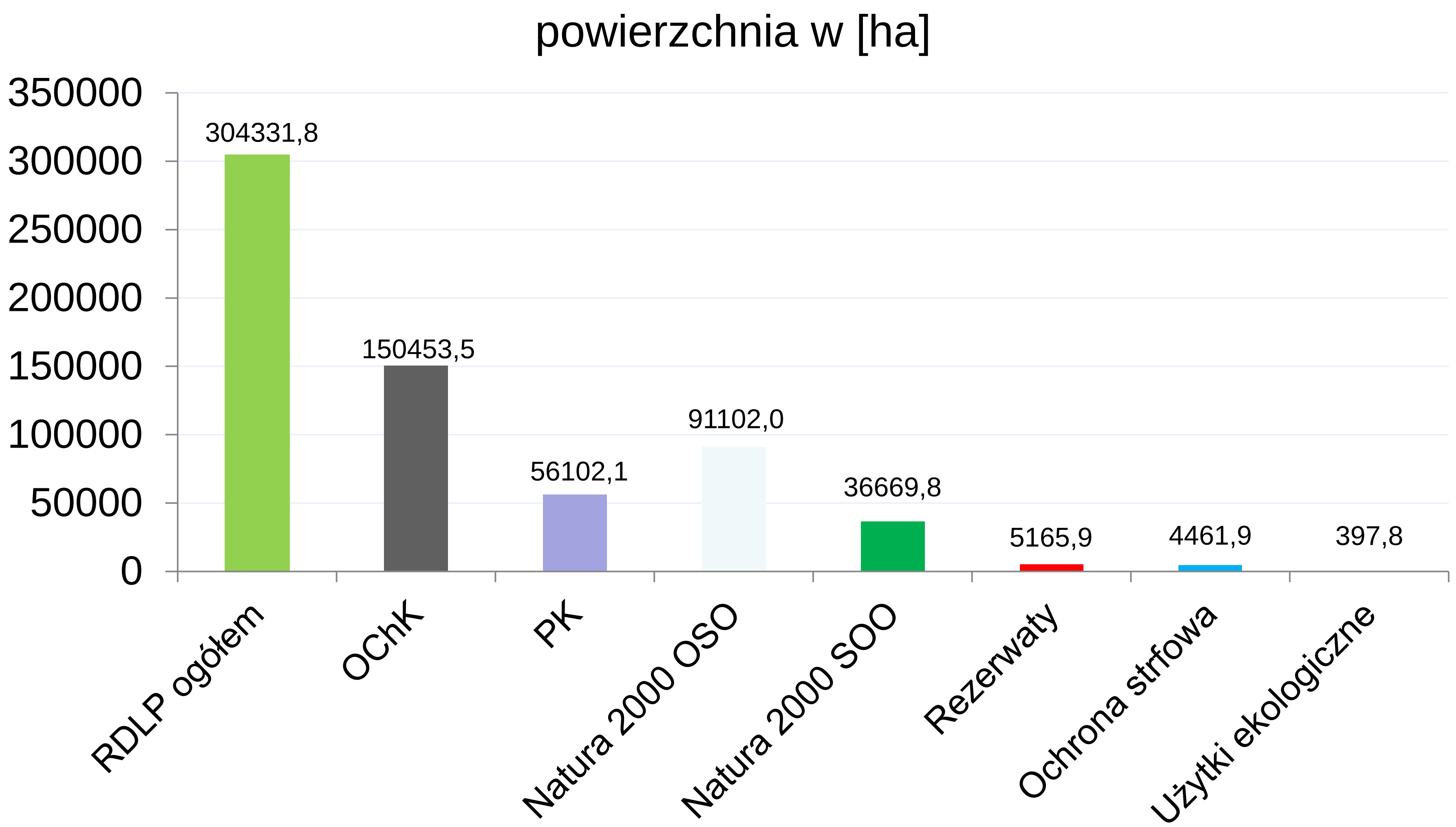


Private and municipal forests in the Gdańsk RDoSF range



Państwowe Gospodarstwo Leśne
Lasy Państwowe

Surface forms of nature conservation in Gdańsk RDoSF

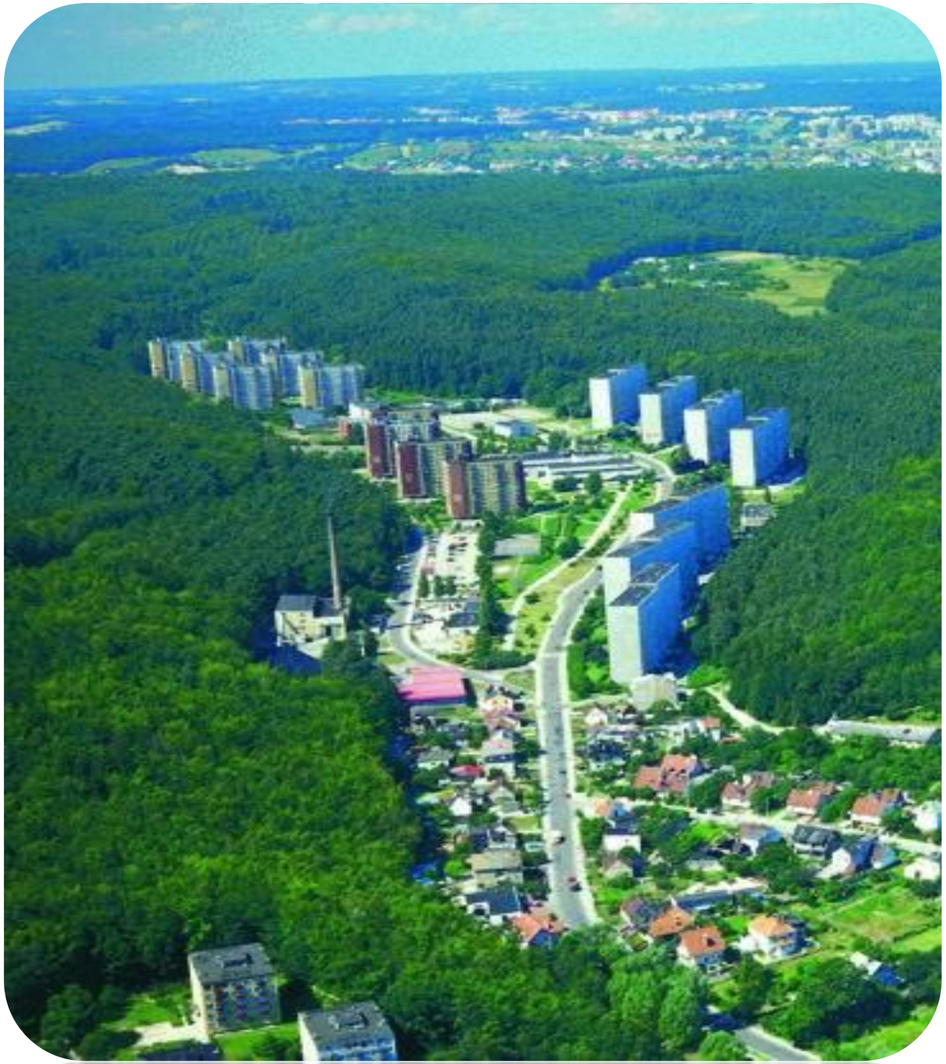



Lasów Państwowych w

The main problems of forest protection in Gdańsk RDoSF

- abiotic factors:
  - hurricane-force winds - on average per year - 100 thousand m^3 fallen and broken trees
- biotic factors:
  - insect pests - on average per year - 135 thousand m^3 deadwood removed
  - loss caused by wildlife - on average per year - 1570 ha protected areas and 30 km fences

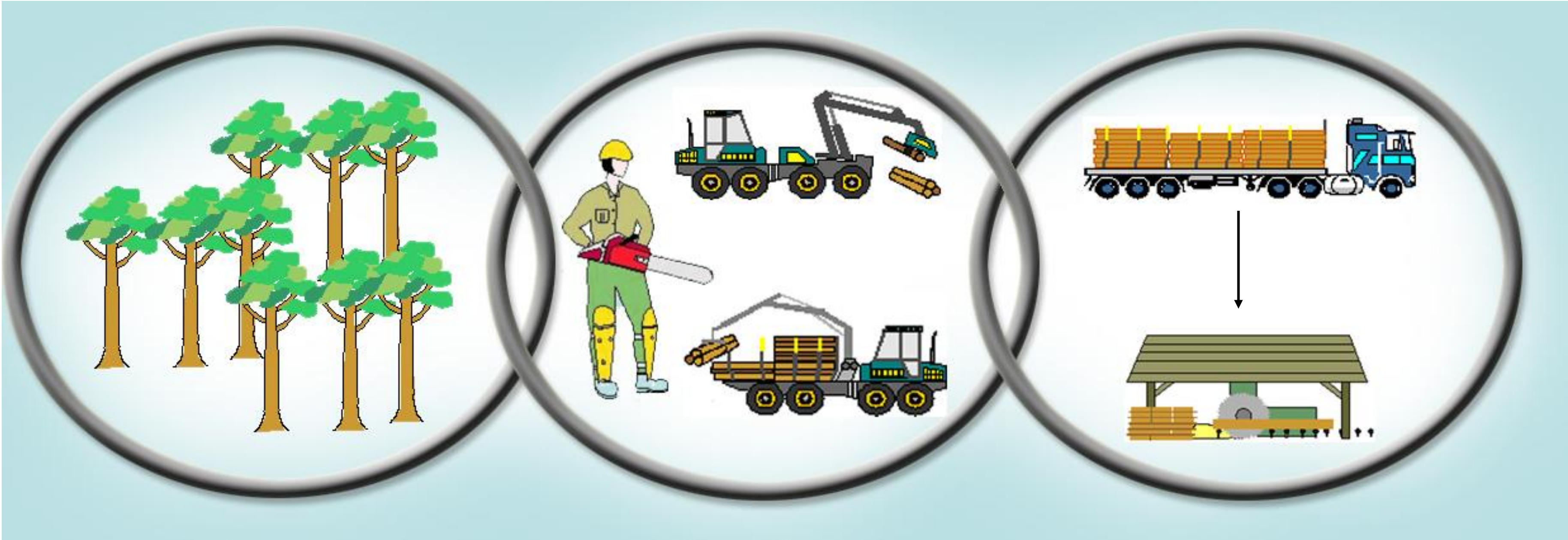
Wildlife in the city




GA 006

Forestry contractors: the competent partners in the forest value chains

- Contractors are an important link in the value chains!
- Forestry and wood industry need contractors!
- Contractors need a good business environment to be successful and develop their enterprises.
- Contractors need to be made fit for serving a hardwood value chain!



Our Vision:

Good Contractors

- are competent,
- offer high quality at competitive costs,
- are specialized in equipment, skills and work organisation,
- are capable of continuous development,
- offer attractive jobs and stable employment,
- offer safe and healthy workplaces.

Facts:

- Forestry and forest based sectors
- wood industry
  - construction
  - pulp and paper
  - Energy

need more and higher qualified contractors in the future!

Order of the day:
Increase attractiveness of forestry work

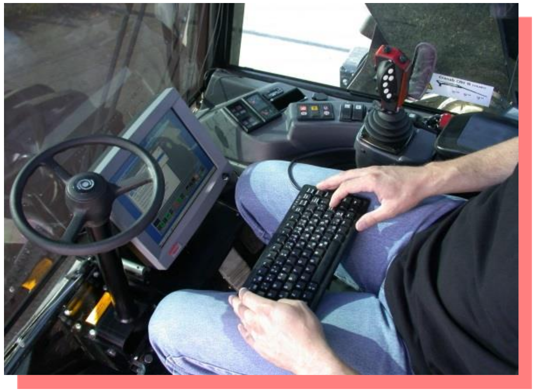
- Forestry competes with many sectors for motivated and talented workers!
- Forestry work needs to improve its image.
- Working conditions, health and safety and career opportunities need to be improved to make forestry work more attractive.
- Profitability of forest operations must be improved.

Forestry Work must be somehow attractive!?

Future of Forestry Work

- Forest sectors will need highly competent workers and contractors in sufficient numbers!

  From "loggers" to high tech operators.
- Many workers will become independent entrepreneurs and need competences in:
  - general management
    - business calculation, bookkeeping
  - personnel management and leadership
    - labour legislation
    - health and safety
  - technology, process management, work planning and work organisation
  - forest ecosystem management, incl. forest certification requirements



Situation of SMEs in the Hardwood Value Chains in the South Baltic Region

1. **Describe the structure and conditions of SMEs in the hardwood value chain in the South Baltic Region. SWOT ANALYSIS**
2. **Describe working conditions with particular focus on training demand for improvement of benefits from hardwoods in the region**
3. **Assess existing and required political and extension support structures.**

Estimation of annual increment of the different tree species in the Region in million m³

These data are extrapolated from the available statistical data and shall only be considered as an indication for the growth potential.

	pine	spruce	Other Coni-fers	oak	beech	birch	Other broad-leafs	Total
Mio. m^3	9	4,5	0,5	1	1	2,5	1,5	20

SWOT Analysis   Strenghts:

- **Good growing conditions for high quality hardwoods throughout the Region**
- **Potential for good timber quality**
- **Excellent forest management** with high competences in managing mixed stands, particularly in Poland and Germany
- **Excellent infrastructure** – harbours and sea routes for inter-regional trade (low cost for transport)

SWOT Analysis Weaknesses:

- Cost structure in harvesting and wood mobilisation.
- Qualification of forest owners, forest management, contractors and forest workers.
- Lack of positive attitude towards hardwood production (SE).
- Low expectation of economic benefits from hardwoods. Growing hardwoods is a long term business, compared to softwood.
- Rather low amount of really good qualities of hardwood timber to establish a prosperous hardwood value chain.

SWOT Analysis   Opportunities:

- Use of the high growth and quality potential.
- Development of processing enterprises.
- Specialisation on Hardwood products.
- Regional trademark “Baltic Wood”
- Huge potential for non wood forest products and services: tourism, quality of life.

SWOT Analysis   Threats

- Nature conservation limits utilisation of wood.
- Aesthetical value of the forests and effects for tourism.
- Increasing bio-energy demand Future lack of qualified work-force.
- Climate change which may lead tp many new tree diseases. Many hardwood species have problems; ash disease, oak

Conclusions of the SWOT Analysis

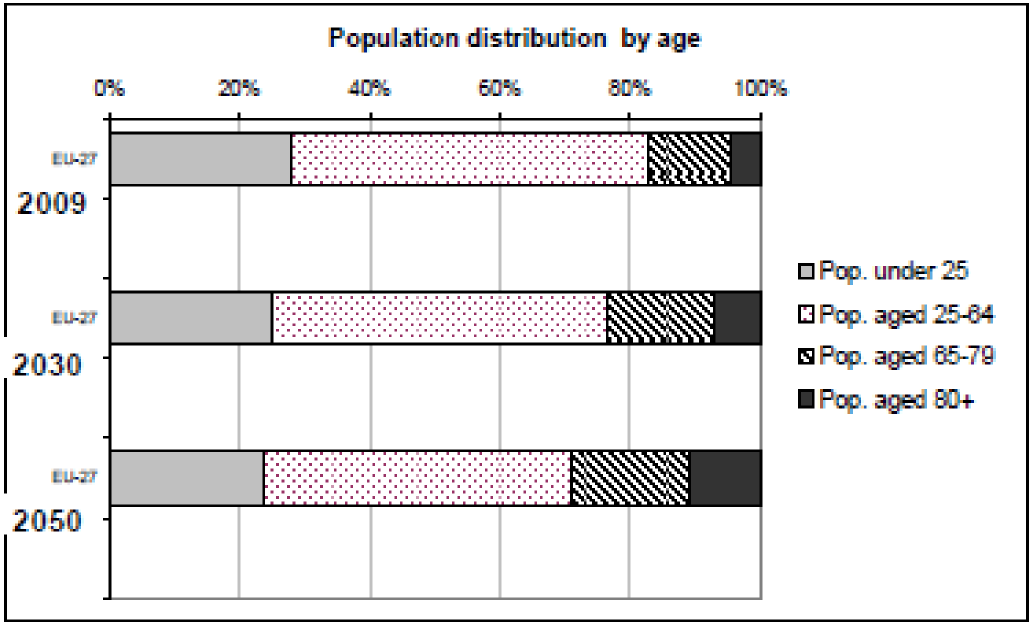
- Hardwoods should be developed into a regional brand!
- Utilisation and branding should respect and promote the high ecologic and tourism value of South Baltic Forests.
- A real regional value chain needs development of the wood processing capacities and facilitating business relationships between forest owners, harvesting enterprises and wood processing companies.
- Qualification of forest owners, forest management, contractors and forest workers needs improvement!

Why do we need to take care of Working Conditions?

lack of a qualified work-force to harvest, transport and process hardwood timber

Threat of demographic change

- Europe´s society is ageing - **and the forestry work force too**.
- 25% of the totally employed people in forestry in the FOREST EUROPE countries are 50 years and older.
- In the Nordic countries 37% of forest machine operators are 50 years and older.
- The forest sector will more and more compete with other sectors for competent new entrants!



Working Conditions are a core element and goal of enterprise development :

- **Viability and profitability of enterprises is the basis for investment in human resources.**
- **Enterprises need to invest**
  - **in recruitment, training and participation.**
  - **in technology, ergonomics and work organisation.**

Working Conditions include many aspects:

- Occupational Safety and Health
- Working Time
- Wages
- Organisation of work and job content
- Training and Education
- Workers´ welfare

The normative frame – DECENT WORK

- "**Creating Jobs** – an economy that generates opportunities for investment, entrepreneurship, skills development, job creation and sustainable livelihoods.
- **Guaranteeing rights at work** – to obtain recognition and respect for the rights of workers. All workers, and in particular disadvantaged or poor workers, need representation, participation, and laws that work for their interests.
- **Extending social protection** – to promote both inclusion and productivity by ensuring that women and men enjoy working conditions that are safe, allow adequate free time and rest, take into account family and social values, provide for adequate compensation in case of lost or reduced income and permit access to adequate healthcare.
- **Promoting social dialogue** – Involving strong and independent workers' and employers' organizations is central to increasing productivity, avoiding disputes at work, and building cohesive societies." (ILO, 2012)

Core aspects - Forestry

- **Harvesting hardwoods**
  - **one of the most dangerous and jobs!**
  - **requires high skills from workers!**
  - **accident risks are present and can not be eliminated -> training and work organisation!**
- **New technologies harvester and forwarder to new health risks**

Core aspects – Wood industry

- **work-place design**
- **low skilled labour**
- **manual handling of wood**
- **main hazards**
  - noise,
  - dust,
  - handling wood
  - dangerous agents like paint and solvents.

Enterprises

Table 1: Number of enterprises in the hardwoods value chain in the South Baltic Region. (Figures based on information from national correspondents)

Country	District/County	Harvesting			Timber Transport			Marketing /Trade			Processing		
		Private Forest Owners	Forest Owners Employees	Forestry Contractors	Private Forest Owners	Forest Owner's Employees	Forestry Contractors	Private Forest Owners	State Forest	Contractors Merchants	Sawmills	Board and Panel	Other
Lithuania											20	6	13
Poland	RDLP Gdańsk	5	1	73	4	7	25	5	15	10	45	2	
Germany	Project Region			30							10		
Sweden	Project Region			80			60				9	1	2
Russia	Kaliningrad region	4		115	1			4			1		

Enterprises - findings

- **Harvesting is mainly in the hands of contractors.**
- **Timber transport is also a contracting business – micro enterprises.**
- **Trade and marketing is done by a mix of actors.**
  - **Exception: Poland and Kaliningrad.**
- **Wood processing:**
  - **rather small saw mills**
  - **quite fragmented.**

  Exception: big companies in Sweden and in the Kalinigrad region,

Hardwood based value chains can be characterised by a high number of small enterprises in forest operations

(forestry contractors).

Employment

Table 2: Average number of employees per enterprise category in the hard-woods value chain in the South Baltic Region. (Figures based on information from national correspondents)

Country	District/County	Harvesting			Timber Transport			Marketing /Trade			Processing		
		Private Forest Owners	Forest Owners Employees	Forestry Contractors	Private Forest Owners	Forest Owners Employees	Forestry Contractors	Private Forest Owners	State Forest	Contractors /Merchants	Sawmills	Board and Panel	Other
Poland	RDLP Gdańsk	3	2	8	2	4	12	2	50	4	15	35	
Germany	Project Region												
Sweden	Skåne län			6			2		10		100	1	2
	Blekinge län			4			2				100		
	Kalmar län			3			2				1300		
	Kronobergs län			1			2				50		
Russia	Kaliningrad region	72		250									

Employment - findings

- Forestry contracting companies are micro enterprises with a work force far below 10 people.
- The largest work force in harvesting in Kaliningrad: average number of 250 workers per enterprise in provided.
- Wood processing:
  - saw mills in Sweden contribute to a huge employment,
  - mills in Poland and Lithuania are in average very small.
  - saw mills in Germany are also small

Competences - Management

- Private forest owners: little competences to manage forests themselves
  - huge demand for training in forest management and marketing.
- Forestry contractors: good craftsmen but not real businessmen.
- Smaller “traditional” sawmills: craftmen level with rather low professional management competences.
  - Important for business networks and advanced development of the hardwood value chains

Competences - Workers

- Forestry contractors:
  - employ professional forest workers,
    Exception: Kaliningrad.
  - Question: are workers sufficiently trained for hardwood operations, to harvest and process large dimension timber in a safe and effective way?
- Small saw mills employ many low skilled workers.
  - Question: How are technical and safety standards in these enterprises?

Competences - the key to good working conditions!

- Forest owners need better knowledge about hardwood management Contractors need improved management skills.
- Harvesting enterprises need to be able to choose the best working procedures and measures to harvest timber with highest regards to stand and soil protection. This includes a keen knowledge of environmental conditions and requirements.
- Workers need to have the skills to harvest large dimensioned timber safely and with care.
- Timber industries – mainly small scale saw mills: ergonomic work place design and **health awareness** is needed.

Creating good working conditions

- Choosing the right work procedure;
- Using the right and safe tools and machines;
- Do it correctly, which means do it safe;
- Organising work in way that it is carried out in the safest possible way.

Development areas for working conditions and training

- Improve skills for harvesting large dimensioned broad-leafed trees.
- Improve Health and Safety management in enterprises, both in forestry and timber industries.
- Pay attention to unskilled workers, because they are the most vulnerable group of employed people.

Small scale forest enterprises and wood processing enterprises need support and advice to develop skills and competences and to maintain good working conditions.

Business development in the regional hardwood chain and capacity building

- **Forest owners,** namely private forest owners need
  - Awareness of the economic value of hardwood timber for higher value end products.
  - more and better knowledge of silviculture measures to produce high quality timber.
- **Harvesting and transport companies** need
  - competences to harvest the timber
  - productive harvesting methods, under highest requirements for protecting biodiversity, and aesthetic value of forest sites. I
  - nvestment in productive and advanced technology
- **Wood processing enterprises** need
  - to invest in advanced technology and know-how
  - advanced marketing skills particularly in this “final” link of the chain.

SMEs need support for enterprise development and capacity building

Support can be provided in form of

- **Consulting**
- **Training**
- **Economic Development Policies**
    - **Small enterprise programmes**
- **Funding**

Next step: To identify and map the the support infrastructure in the Region

Funding

- Rural Development Funds
  - EU direct or national application?
- Regional development funds
- Investment aids (e.g. specific interest rates for specific business scope)
- ……

Next step: To identify and map the support infrastructure in the Region

Consulting:

- **Define demand for knowledge transfer!**
- Availability of agencies
- scope of consulting activities activities Companies / consultancies
- Experience with SMEs and micro enterprises?

Next step: To identify and map the support infrastructure in the Region

Training and education

- Training centres for vocational and technical training
- Courses according to the actual demand of SMEs
- Training networks and partnerships – public/private, B2B

Państwowe Gospodarstwo Leśne
Lasy Państwowe

Seminarium w ramach projektu Hardwoods Are Good

Wyniki badania ankietowego przedsiębiorstw branży drzewnej i zakładów usług leśnych

Autorzy: Sławomir Kuliński Karol Błaszczyk

Rzucewo, 3 - 4 luty 2011

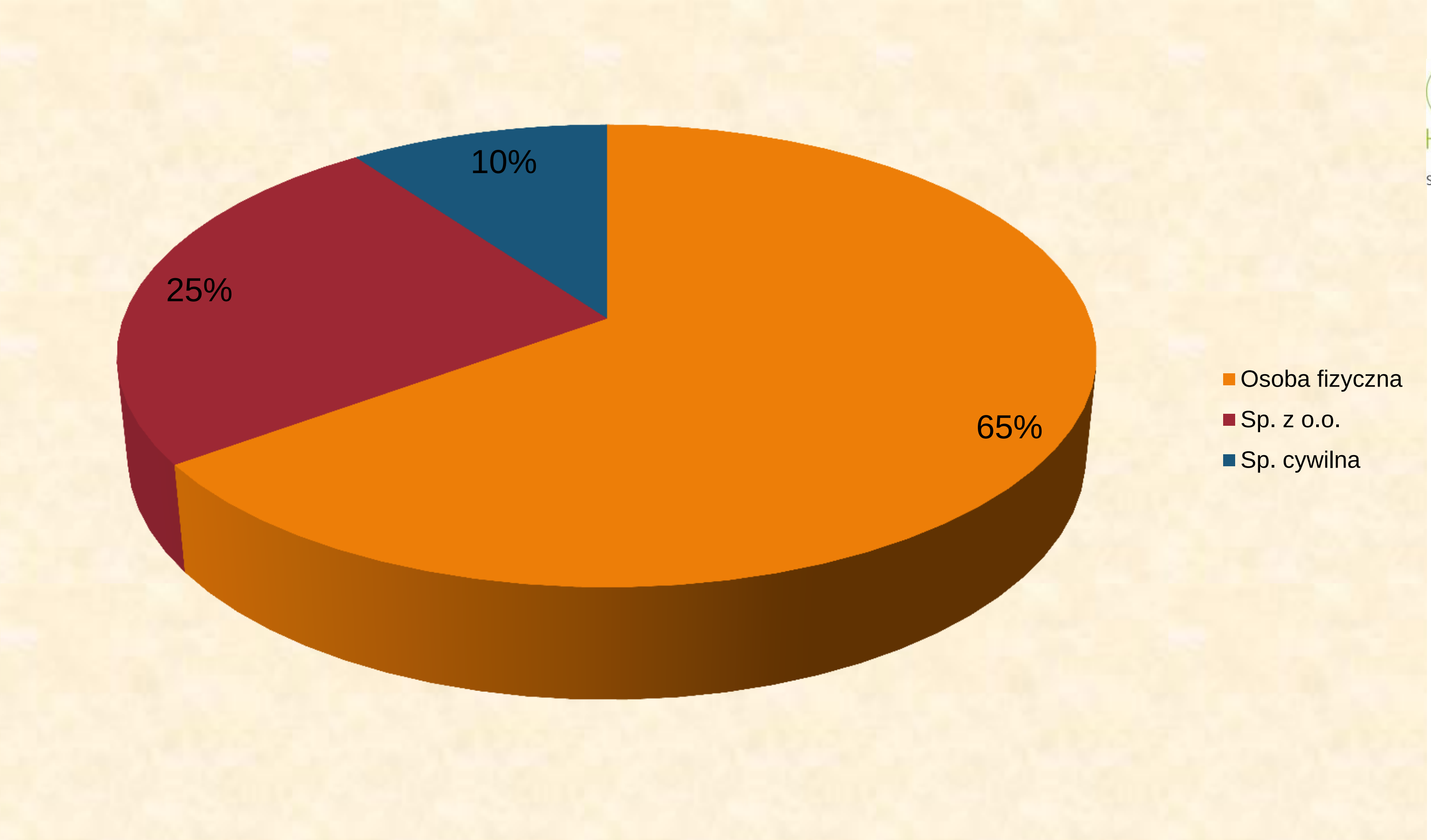
Identyfikacja danych ogólnych o przedsiębiorstwach

Opis kolorystyki tła prezentowanych slajdów

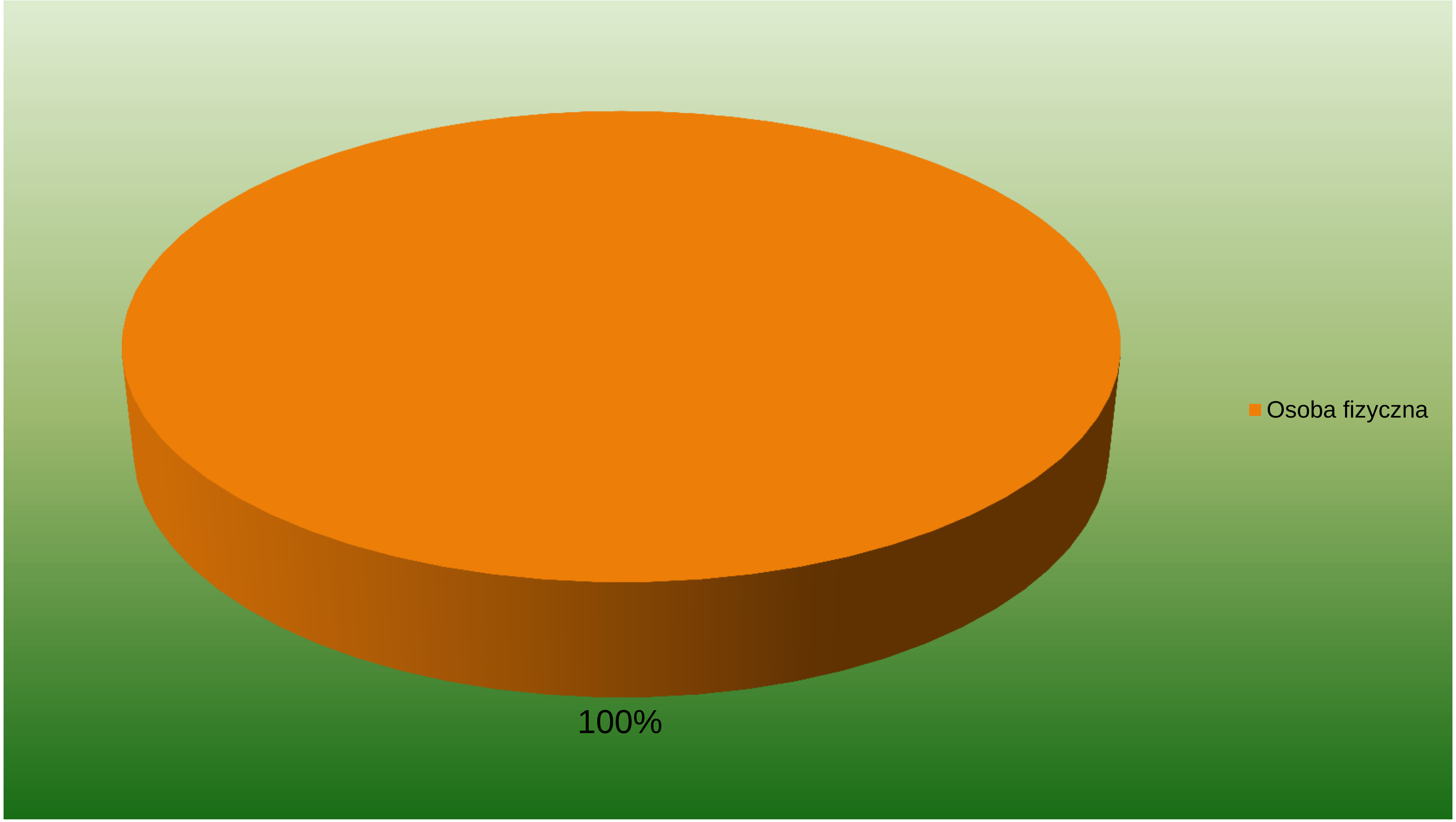
- Prezentacja – Przemysł drzewny

- Prezentacja - Zakłady Usług Leśnych

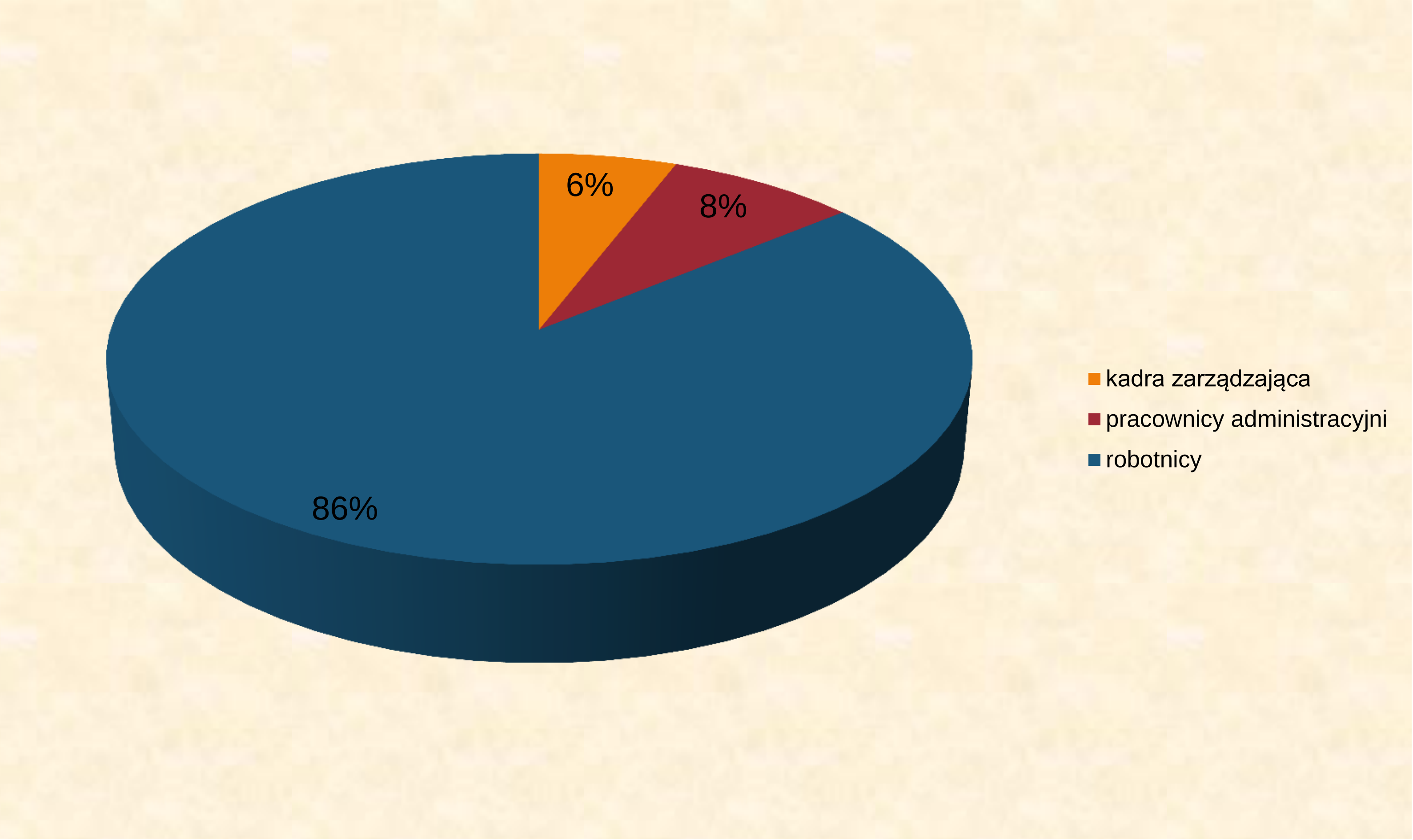
Forma prawna organizacji



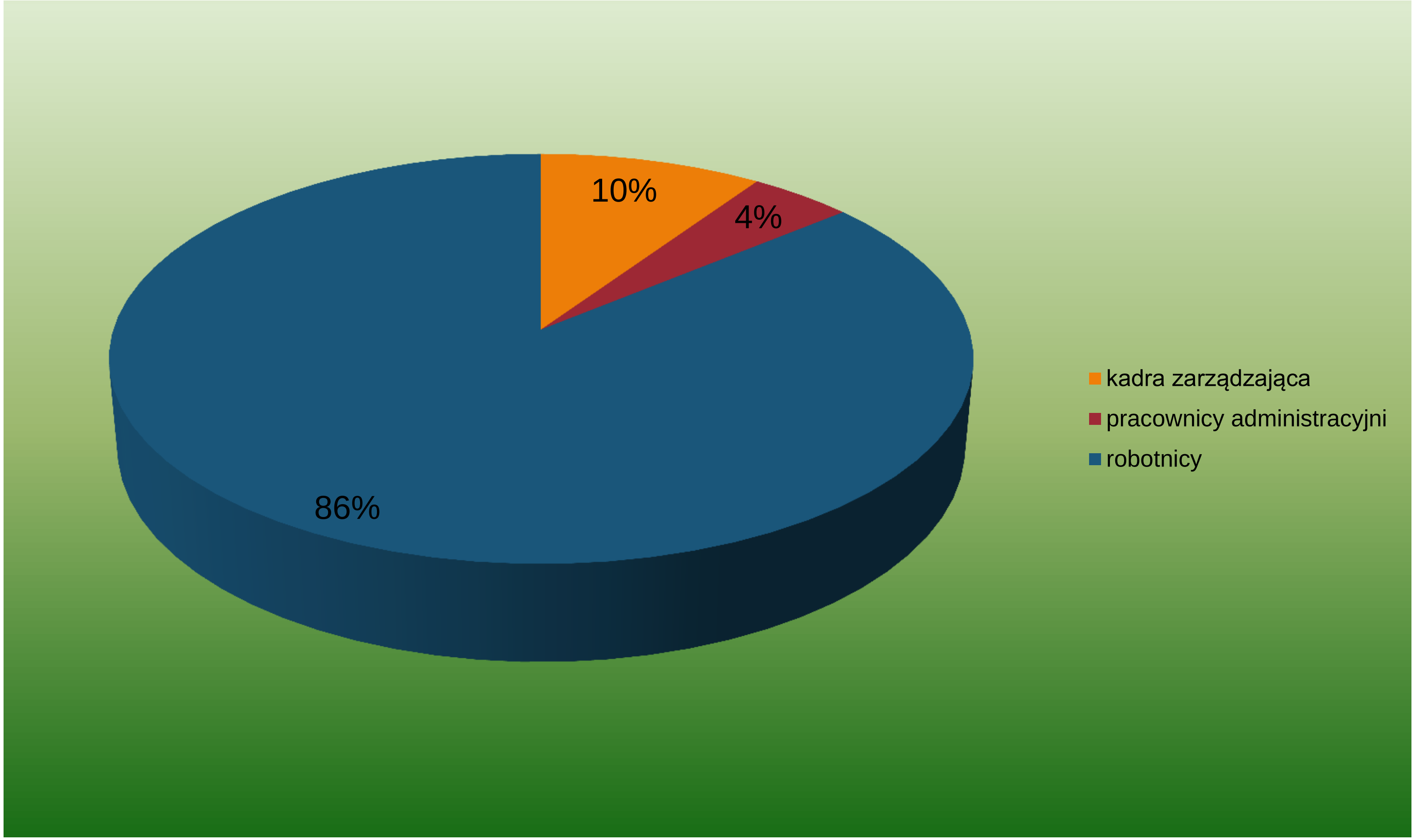
Forma prawna organizacji



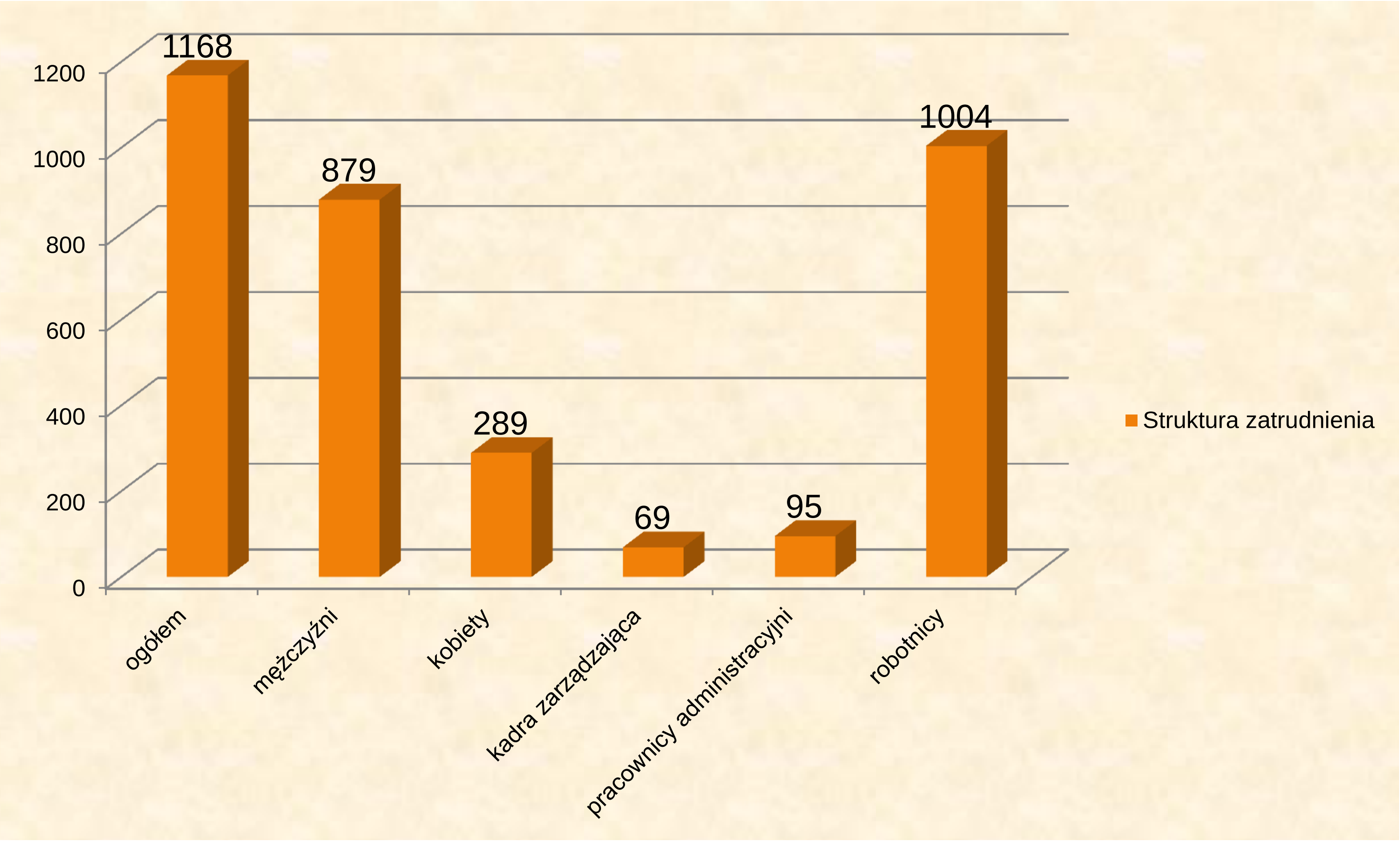
Struktura zatrudnienia



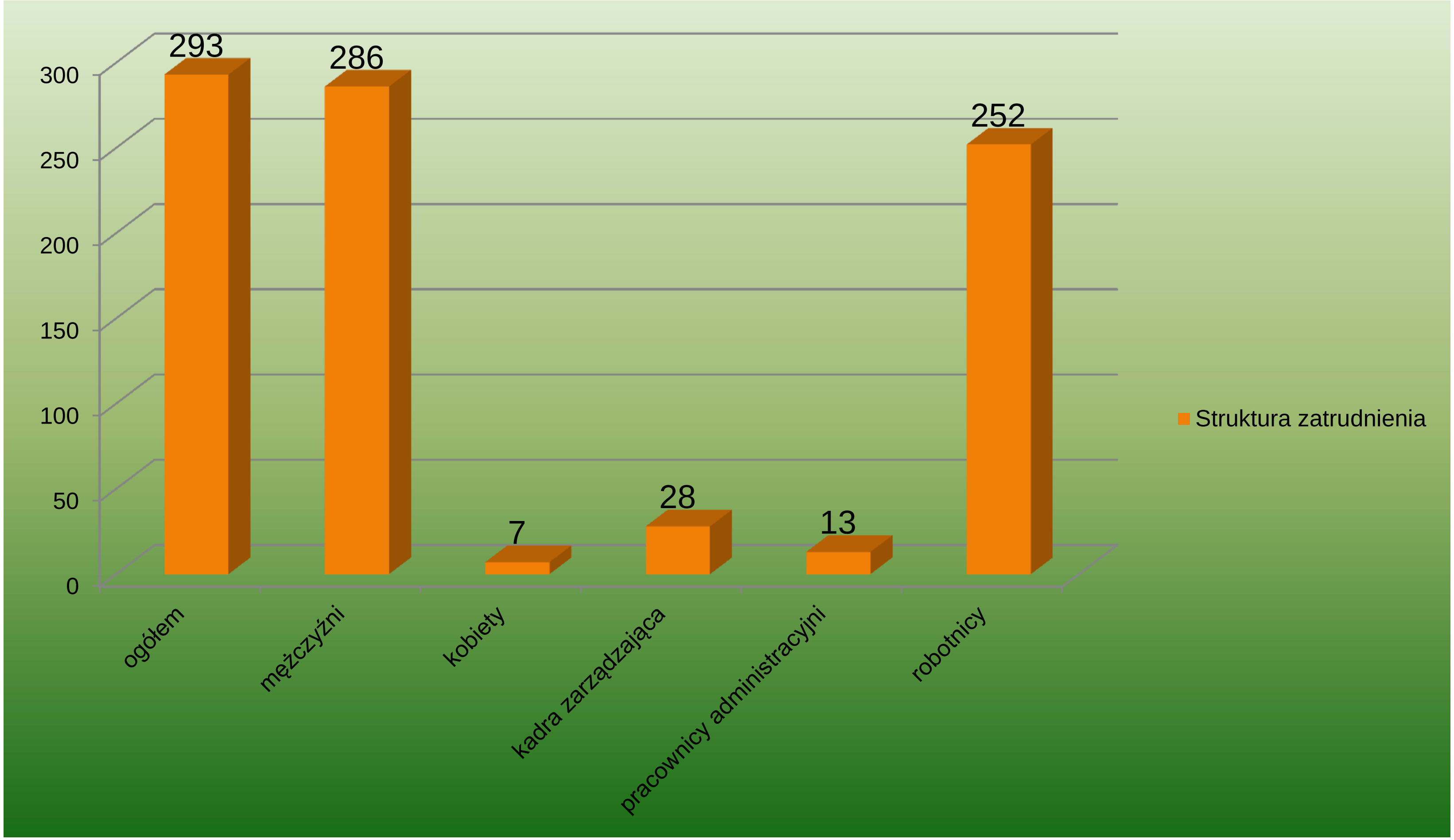
Struktura zatrudnienia



Struktura zatrudnienia



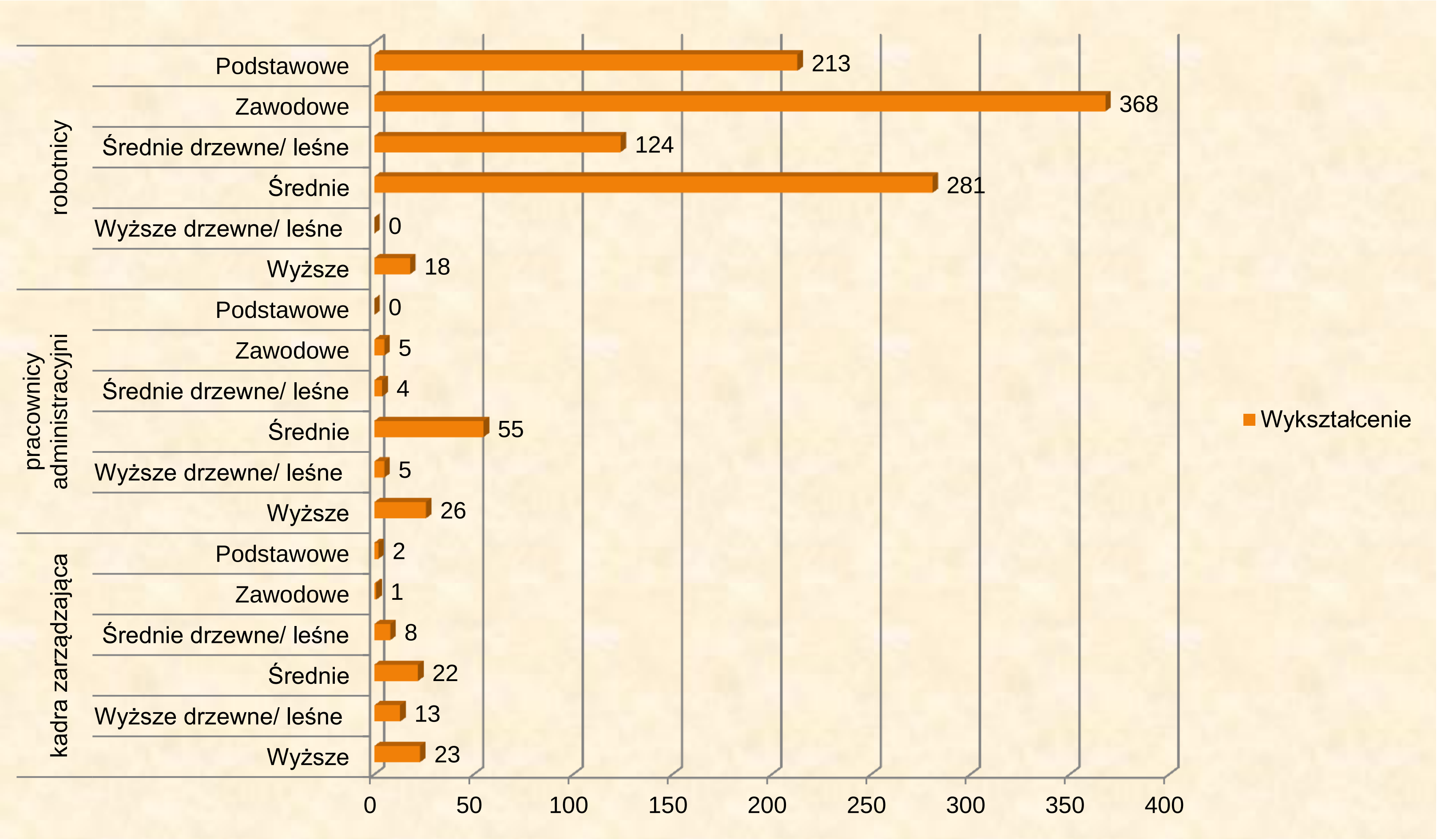
Struktura zatrudnienia



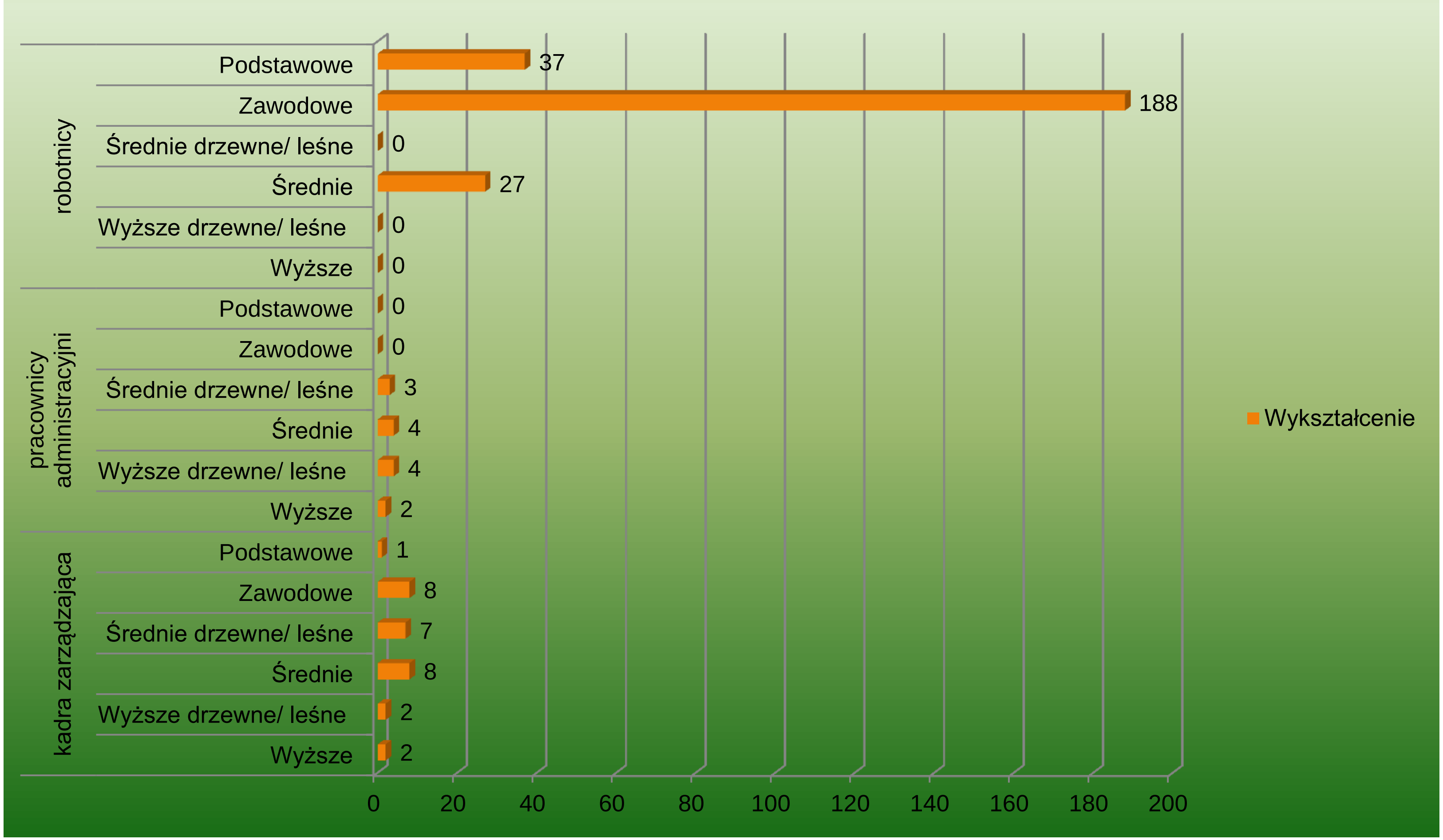
South Baltic PROGRAMME

HARDWOODS ARE GOOD
SUPPORTING ENTREPRENEURS

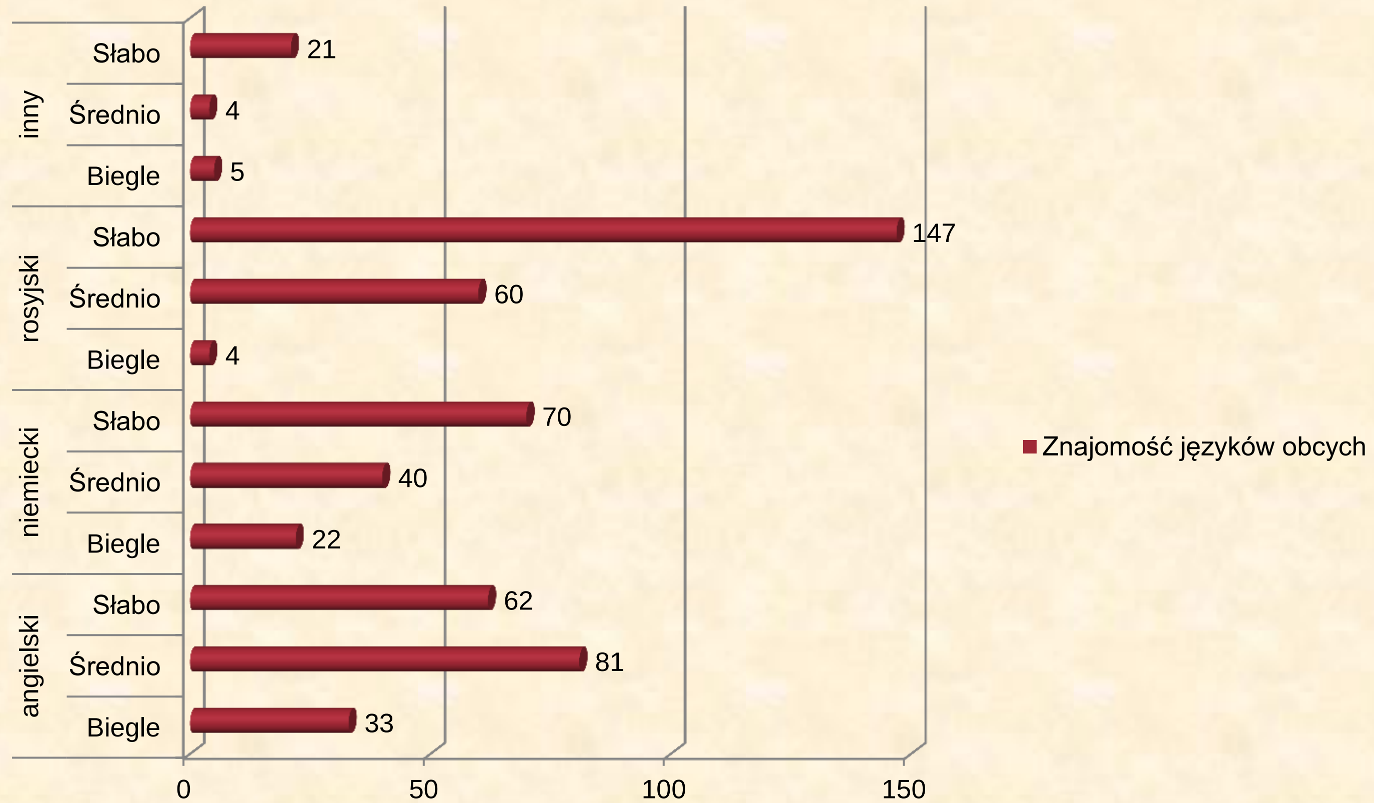
Wykształcenie



Wykształcenie



Znajomość języków obcych



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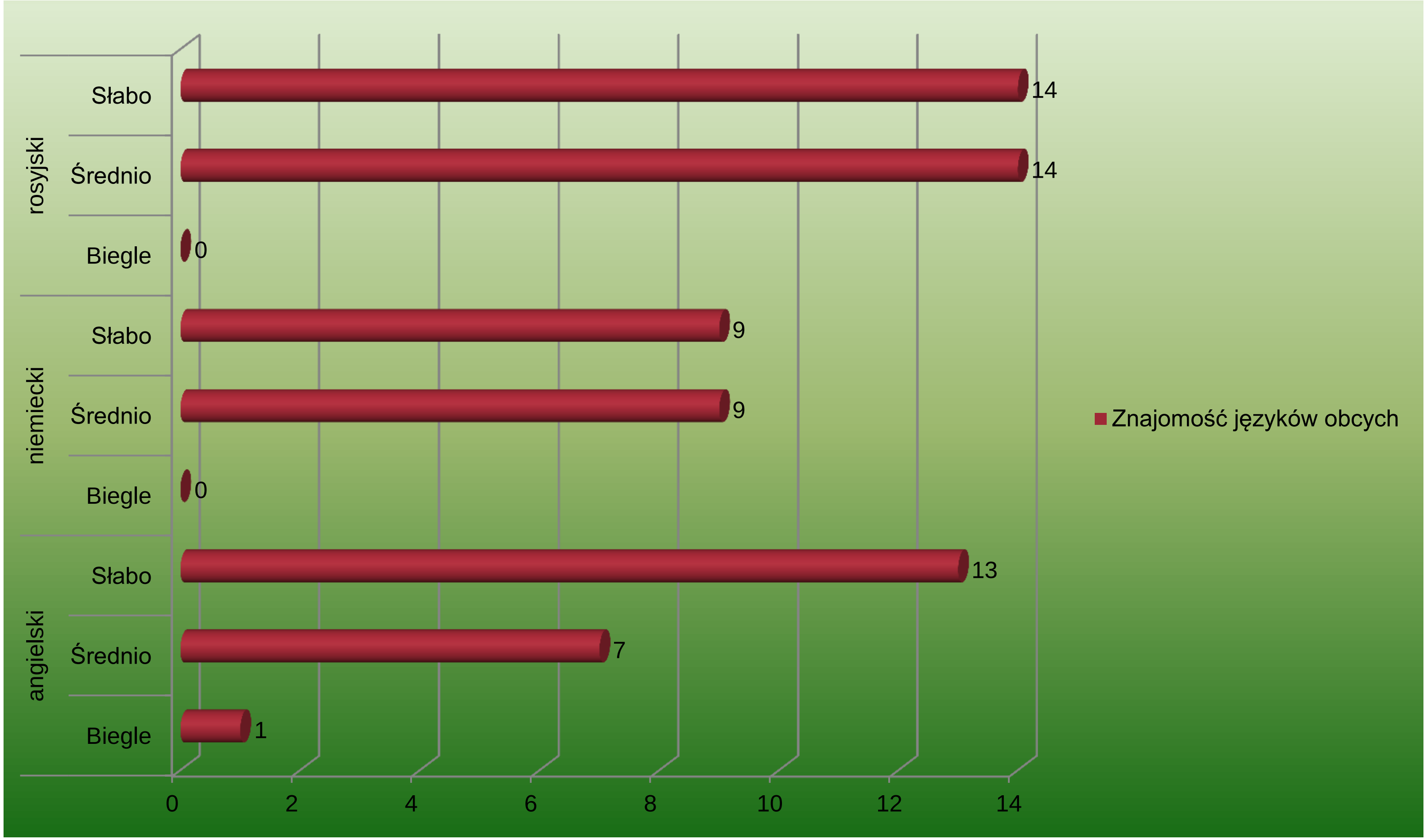
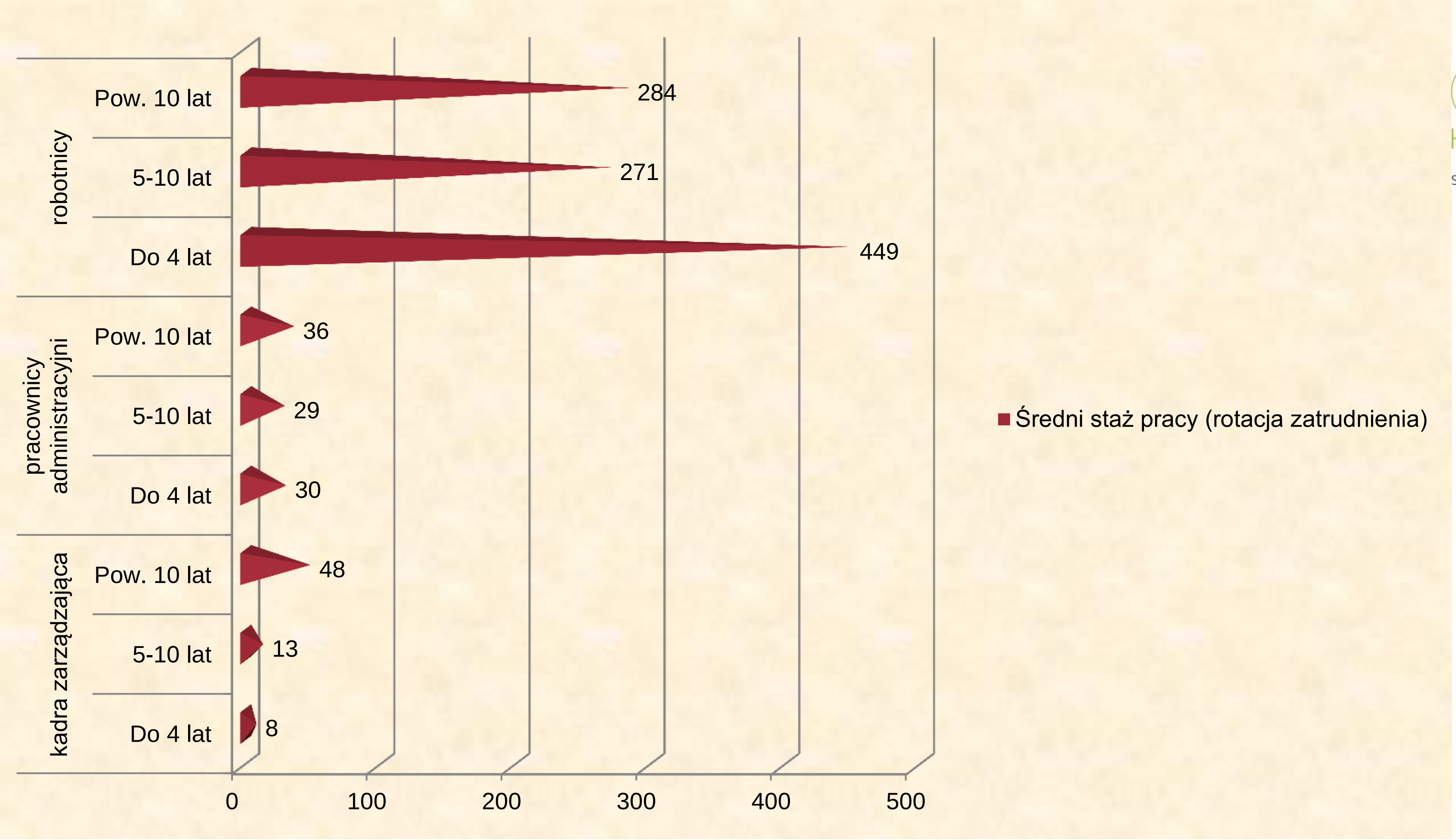


Państwowe Gospodarstwo Leśne
Lasy Państwowe

Średni staż pracy (rotacja zatrudnienia)



South Baltic PROGRAMME

HARDWOODS ARE GOOD SUPPORTING ENTREPRENEURS

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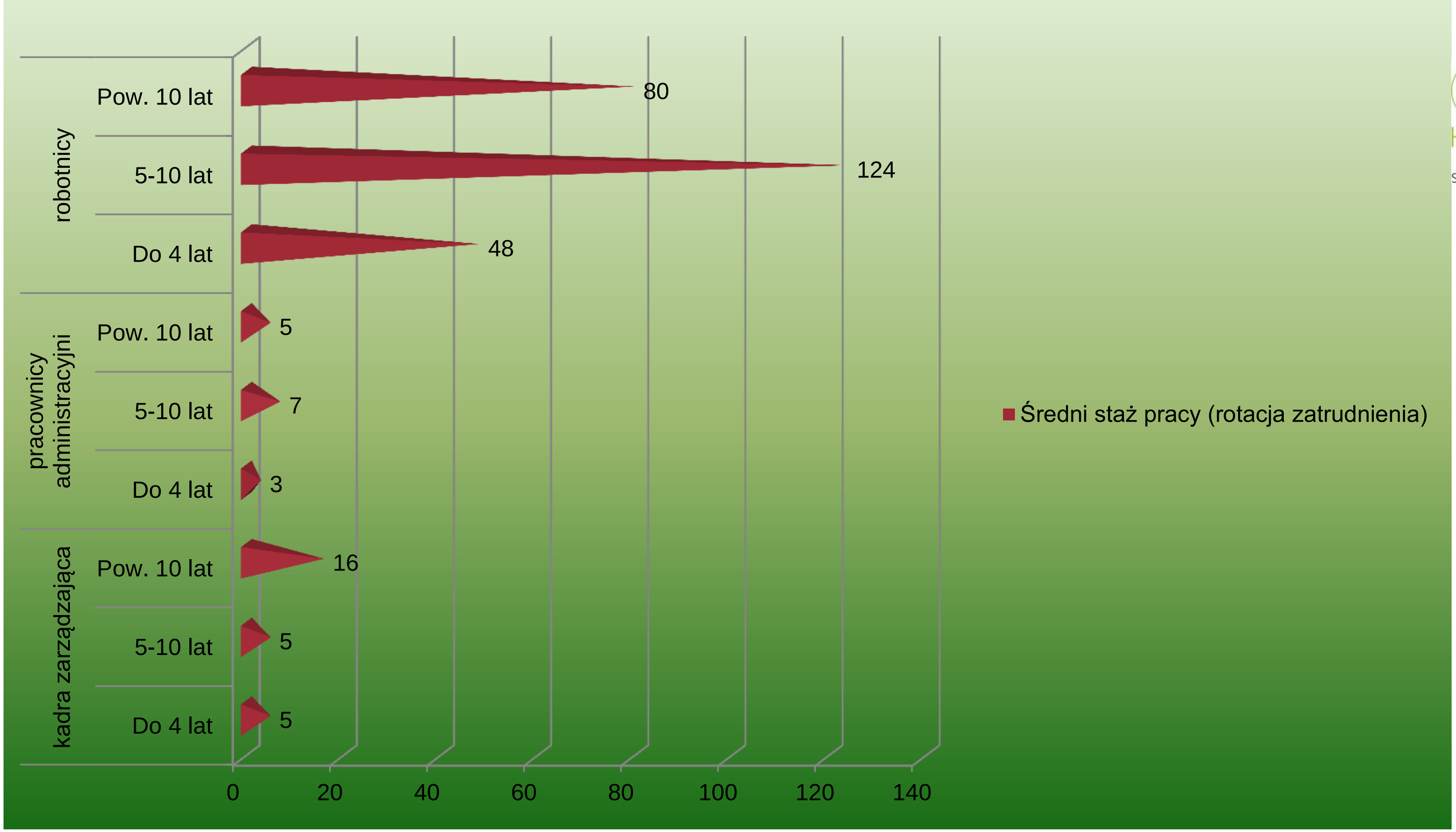
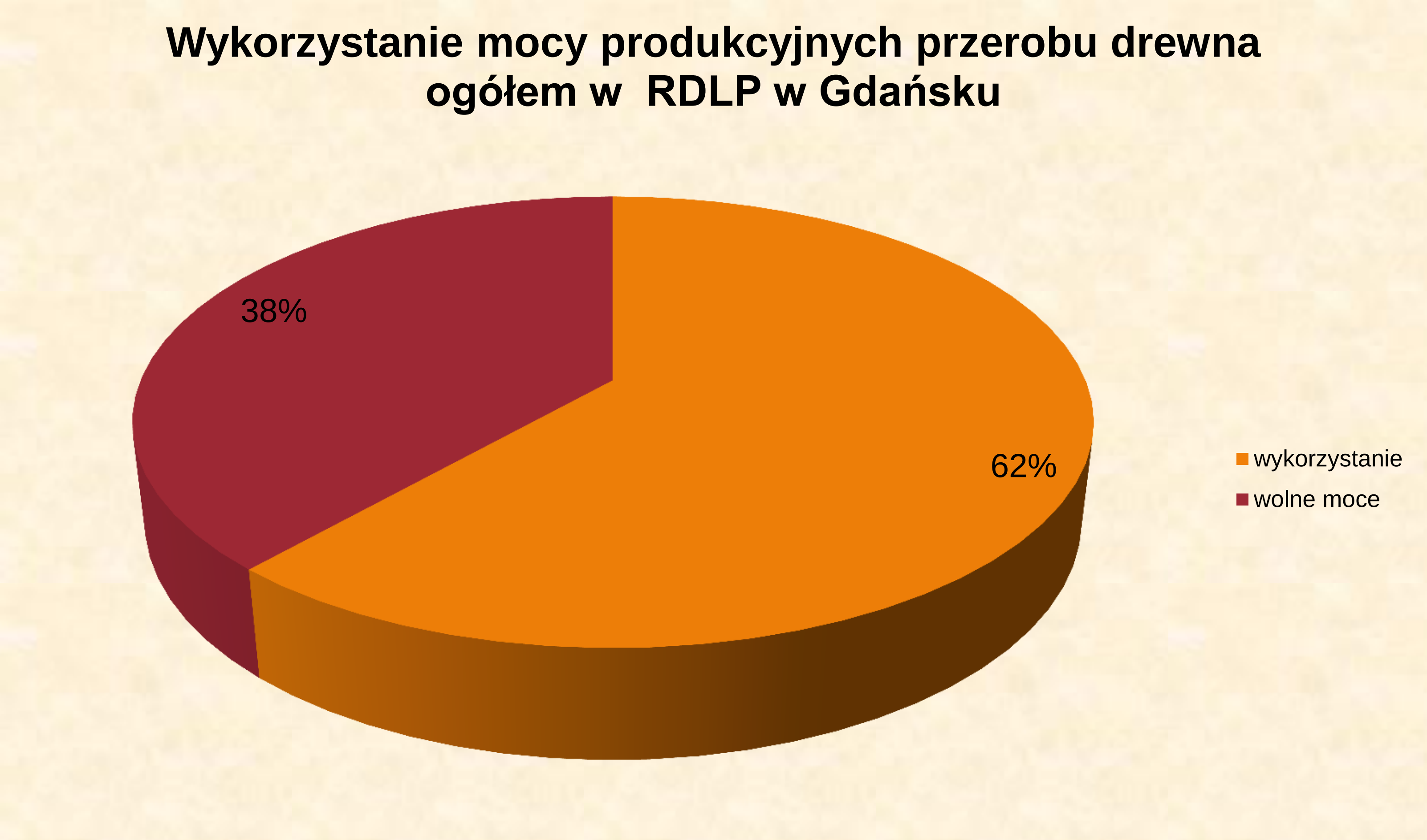


Przerób/pozyskanie drewna



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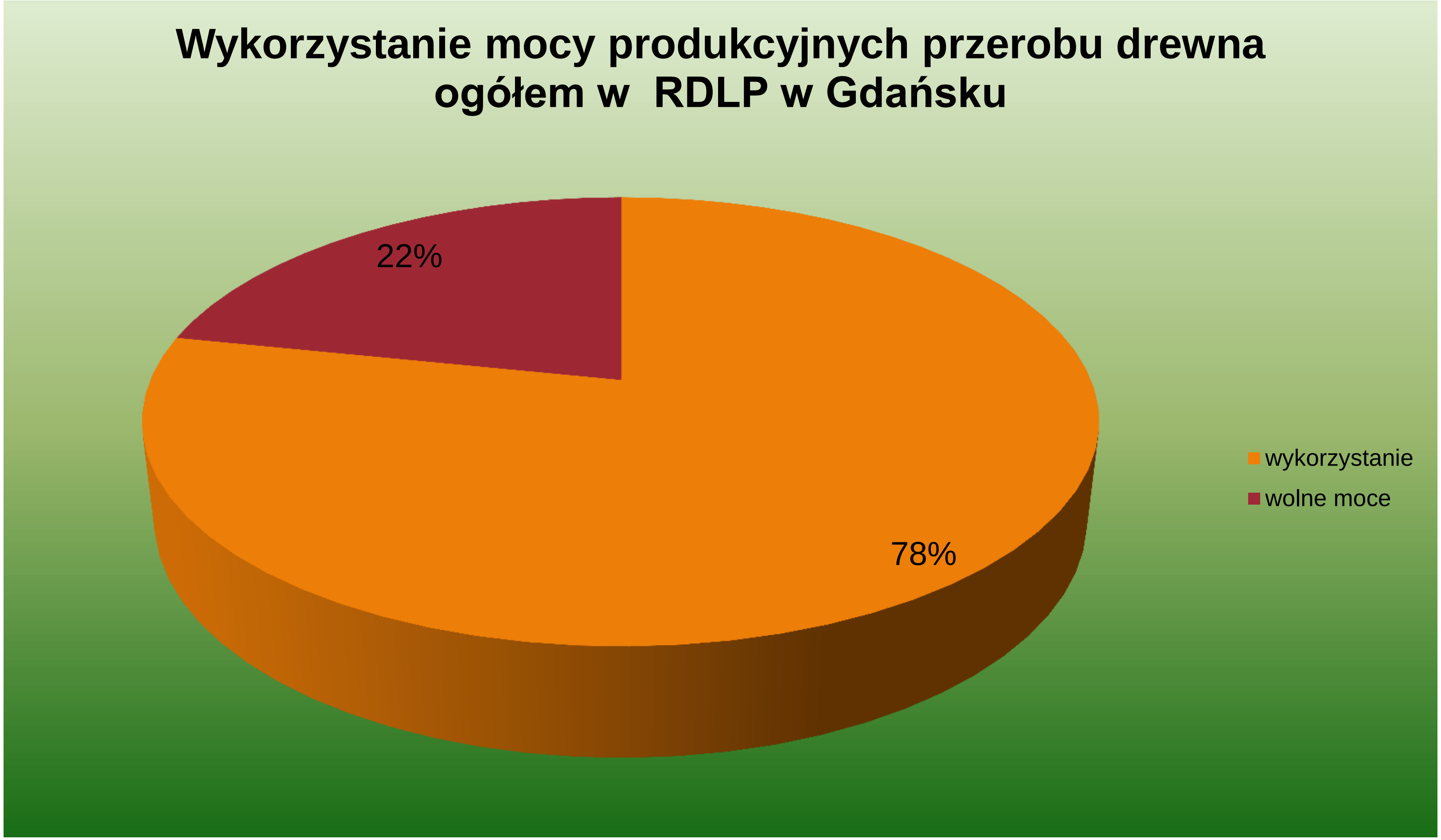

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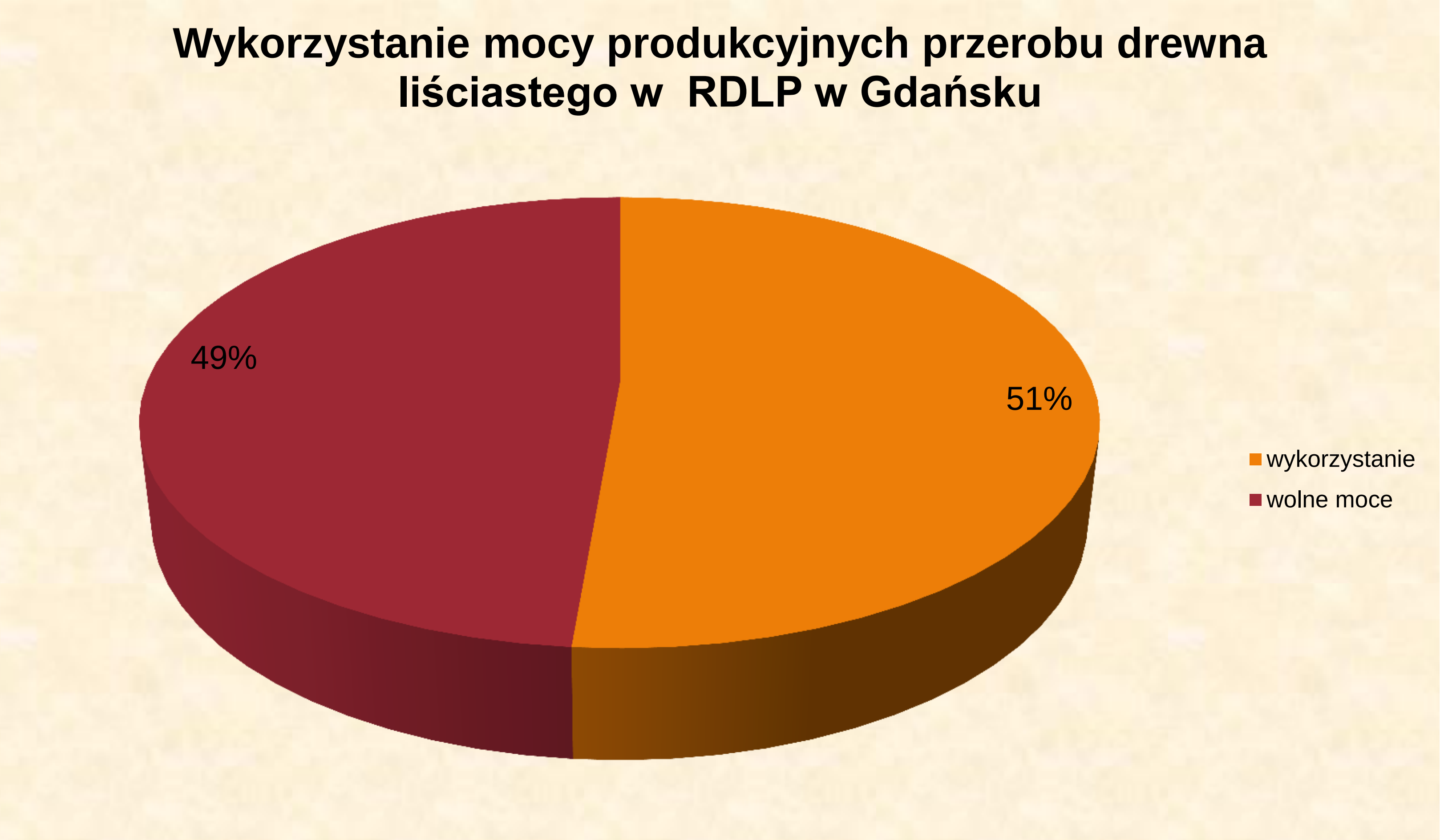

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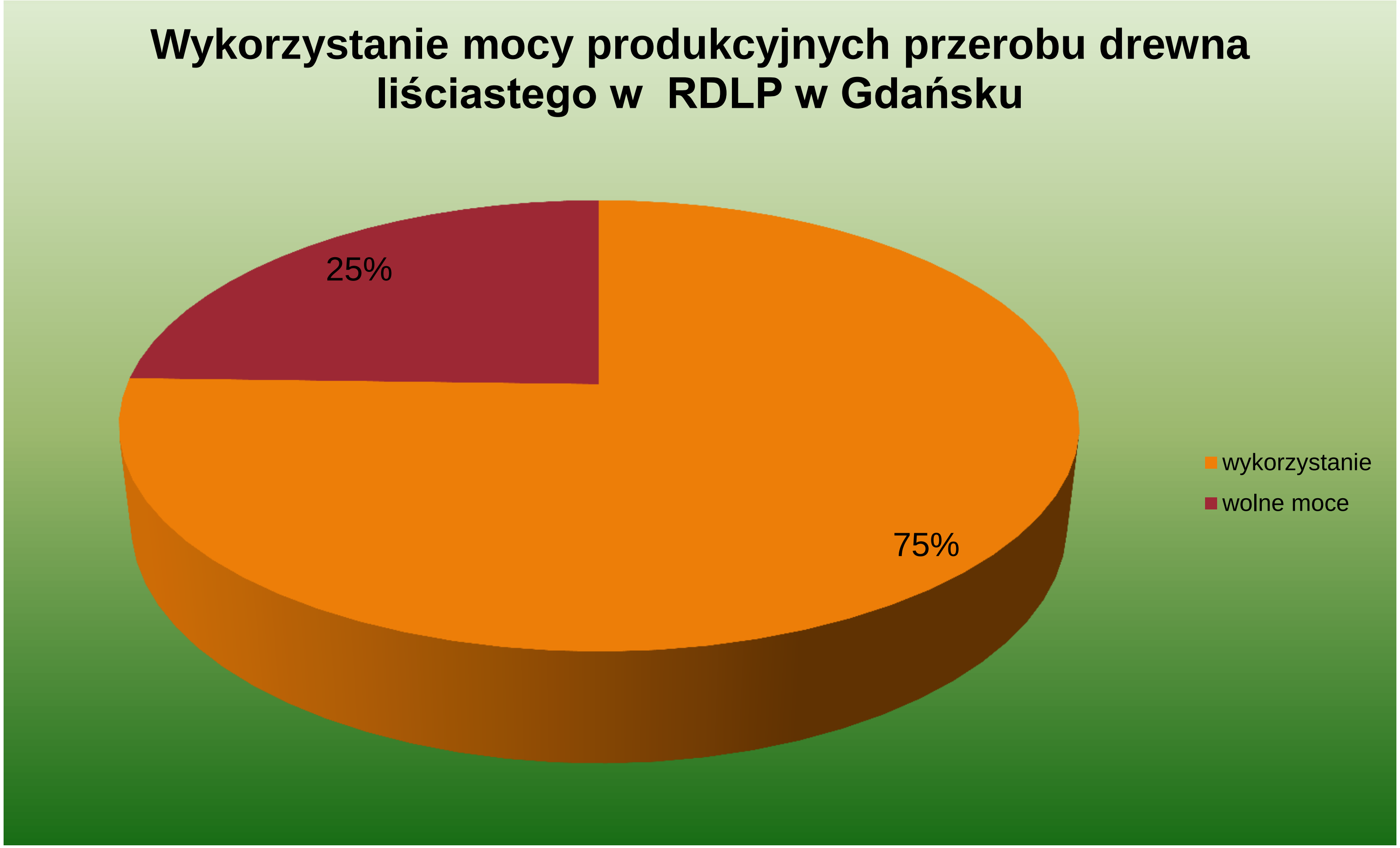

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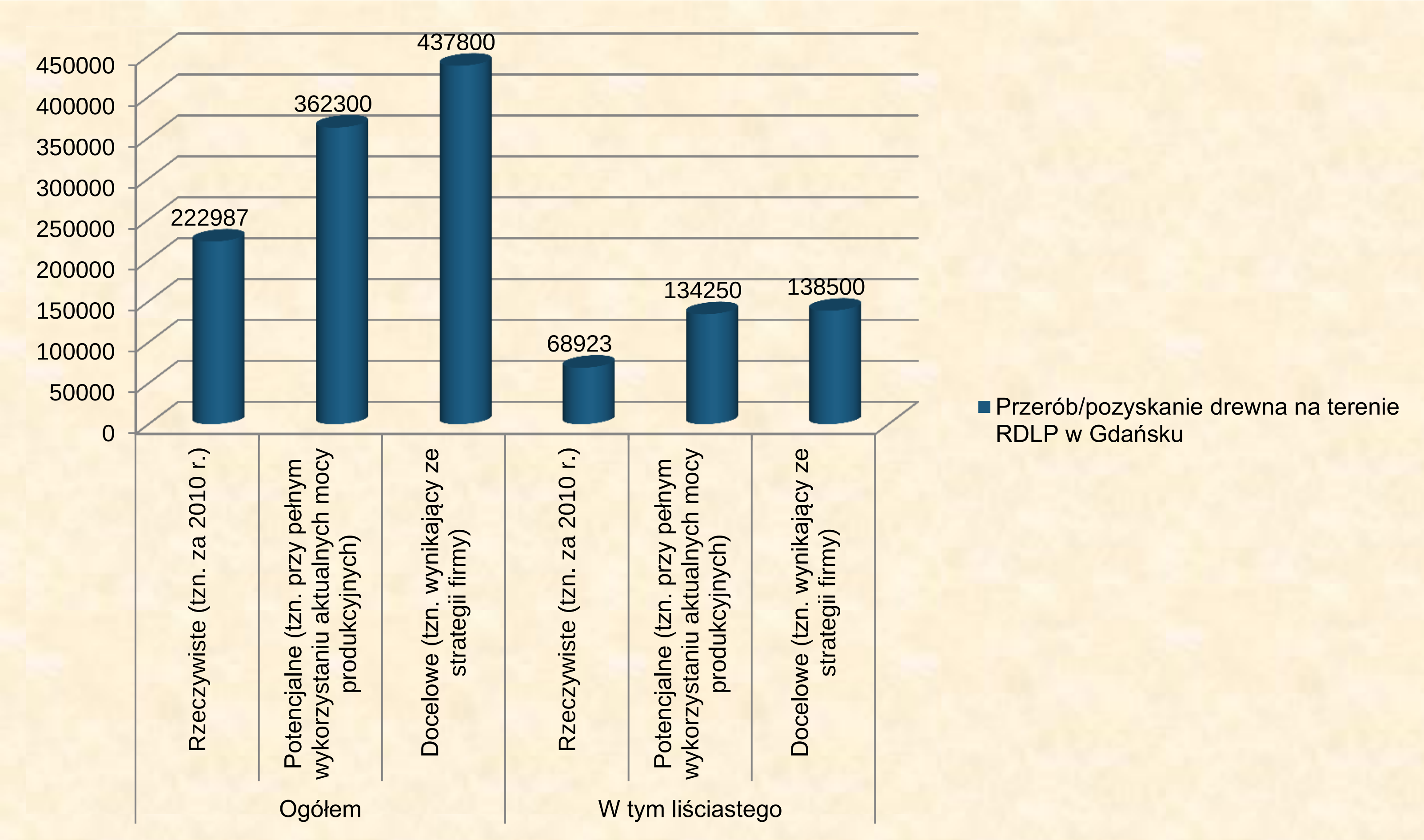

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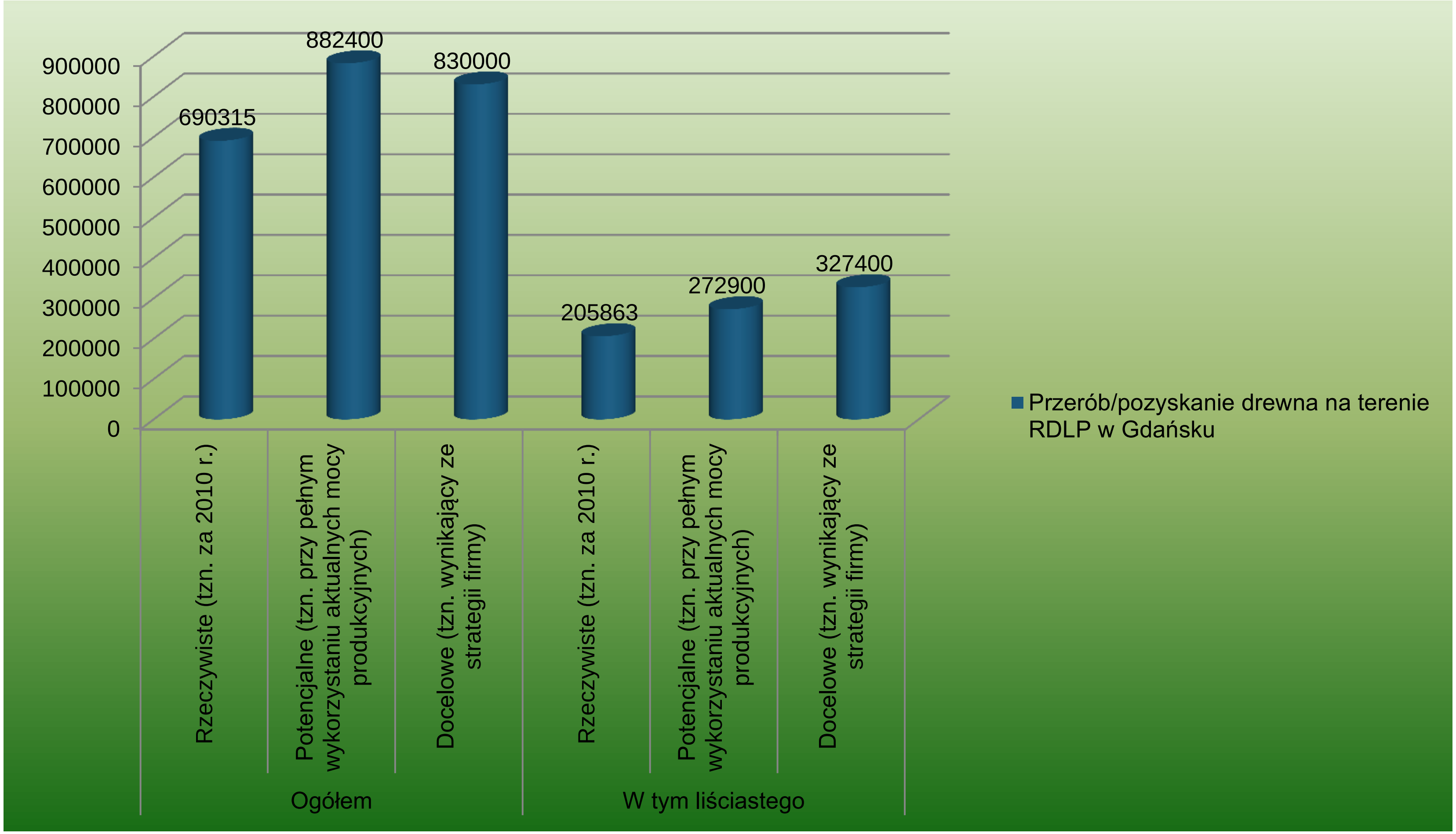
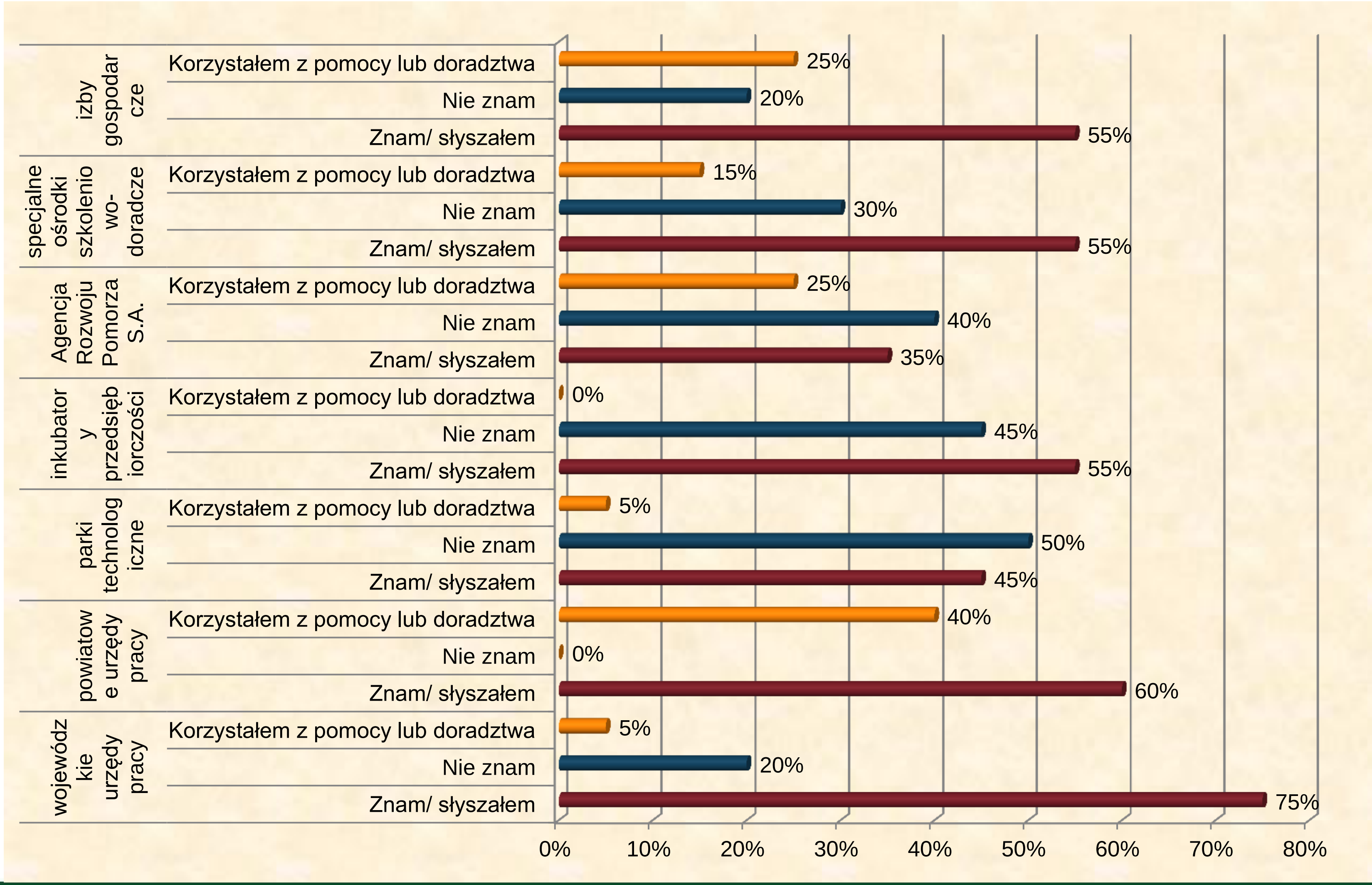
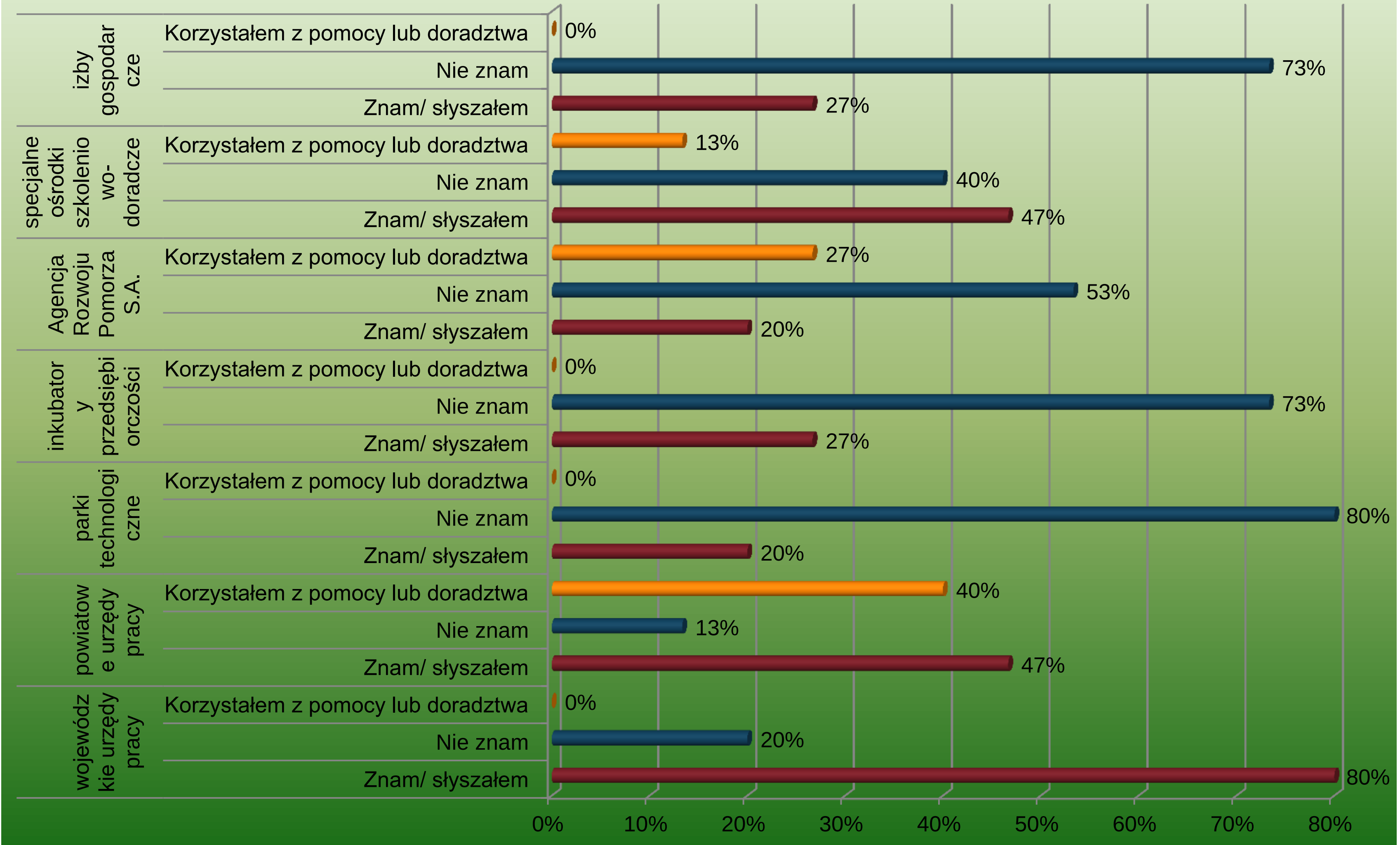


Określenie warunków funkcjonowania przedsiębiorstw i ich interakcji z otoczeniem

Wsparcie wyspecjalizowanych instytucji zewnętrznych



Wsparcie wyspecjalizowanych instytucji zewnętrznych



Korzystanie ze środków pomocowych z UE

- **Programy inwestycyjne**
- Przemysł drzewny - 6 (726,6 tys. zł)
- Zakłady usług leśnych - 6 (380 tys. zł)

- **Programy szkoleniowe**
- Przemysł drzewny - 2 (kwot nie podano)
- Zakłady usług leśnych - 3 (30 tys. zł)

- **Programy wspierające typu analizy, promocje, targi i inne**
- Przemysł drzewny - 6 (kwot nie podano)
- Zakłady usług leśnych - 0

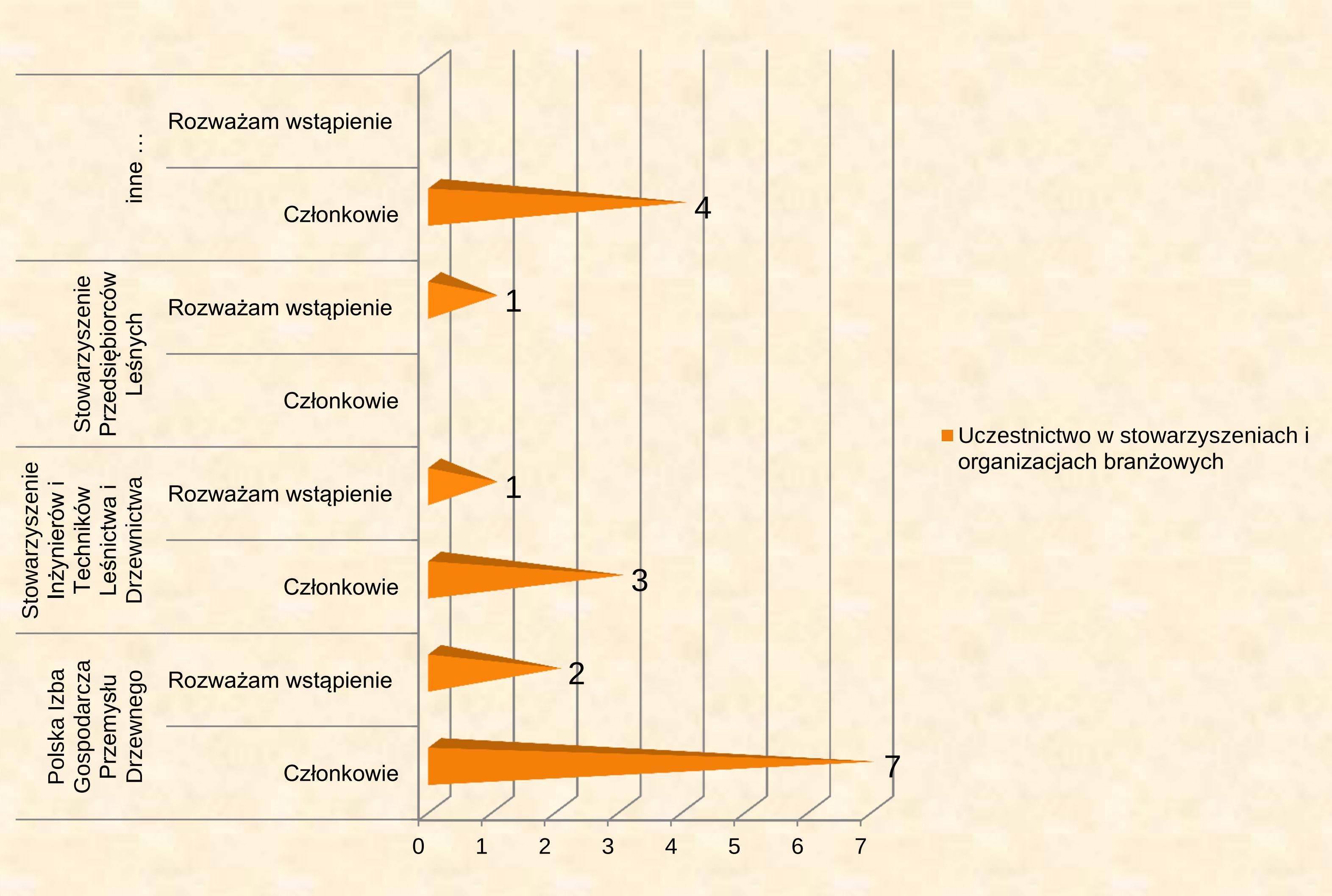
Dotychczasowe nie zakończone sukcesem aplikacje o środki pomocowe z UE

- **Programy inwestycyjne**
- Przemysł drzewny - 4 (5 mln zł)
- Zakłady usług leśnych - 1 (120 tys. zł)

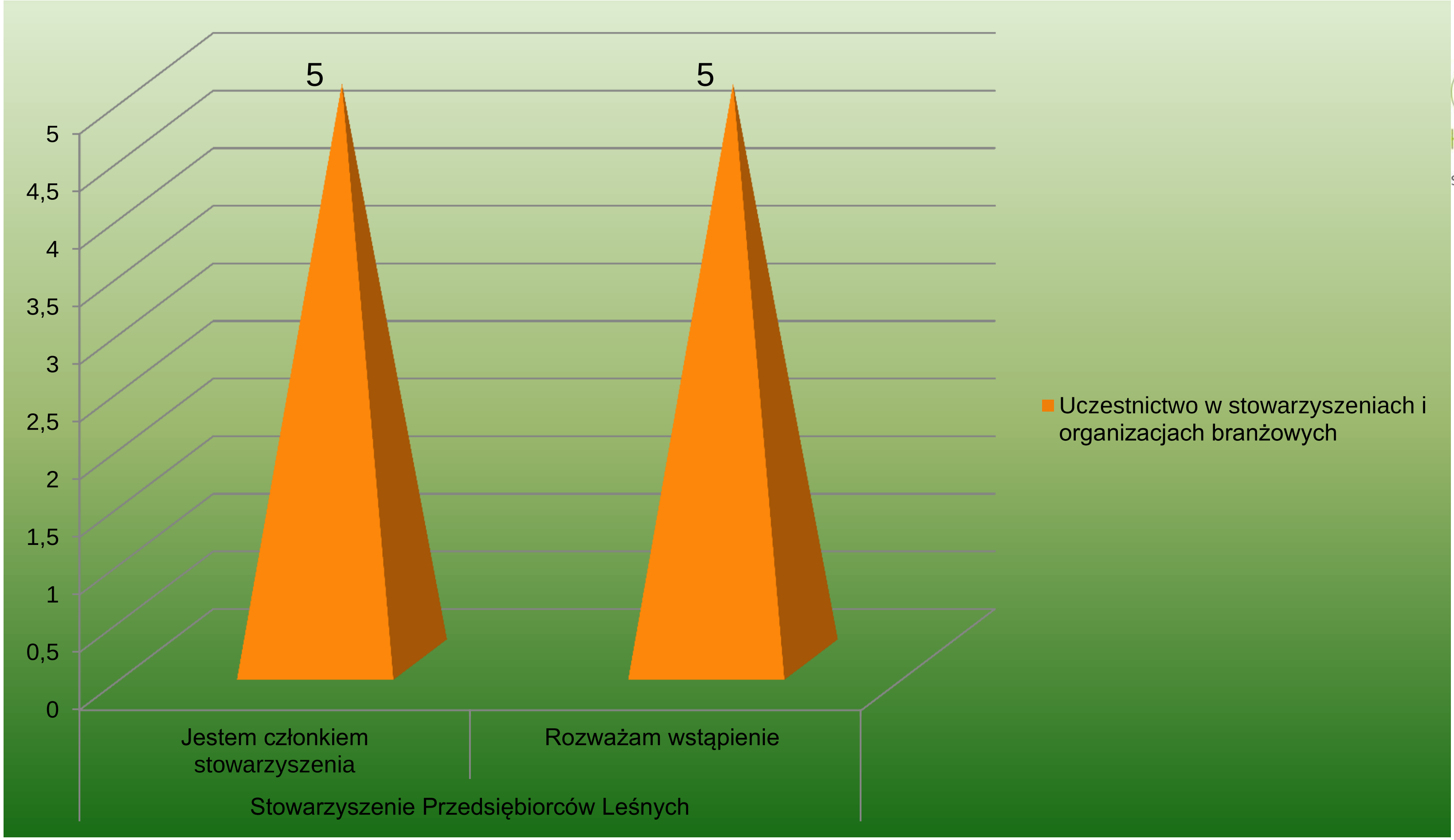
- **Programy szkoleniowe**
- Przemysł drzewny - 0
- Zakłady usług leśnych - 0

- **Programy wspierające (typu analizy, promocje, targi i inne)**
- Przemysł drzewny - 3 (200 tys. zł)
- Zakłady usług leśnych - 0

Uczestnictwo w stowarzyszeniach i organizacjach branżowych



Uczestnictwo w stowarzyszeniach i organizacjach branżowych



Wykorzystanie nowoczesnych technologii wg statystyk UE

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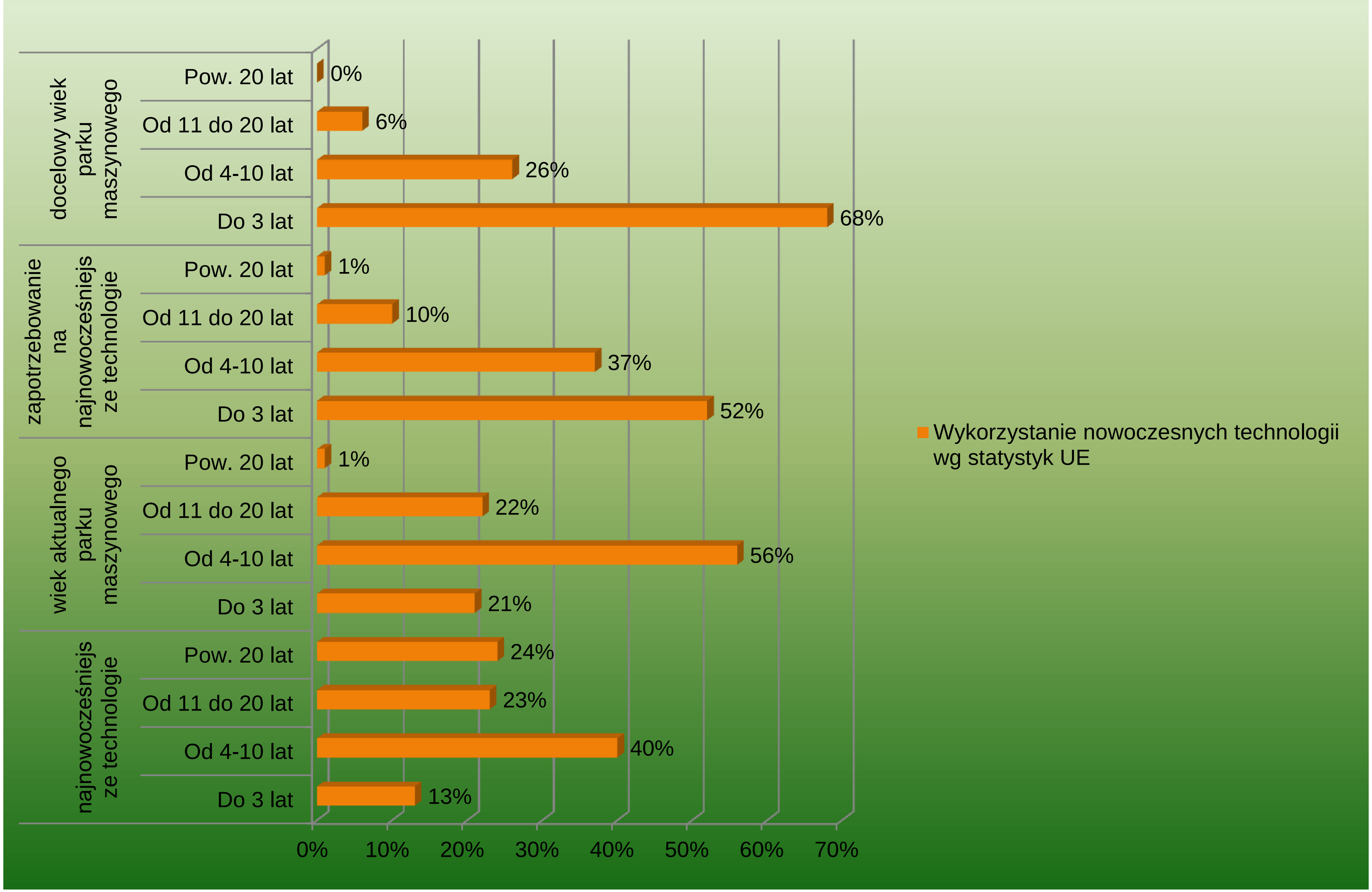
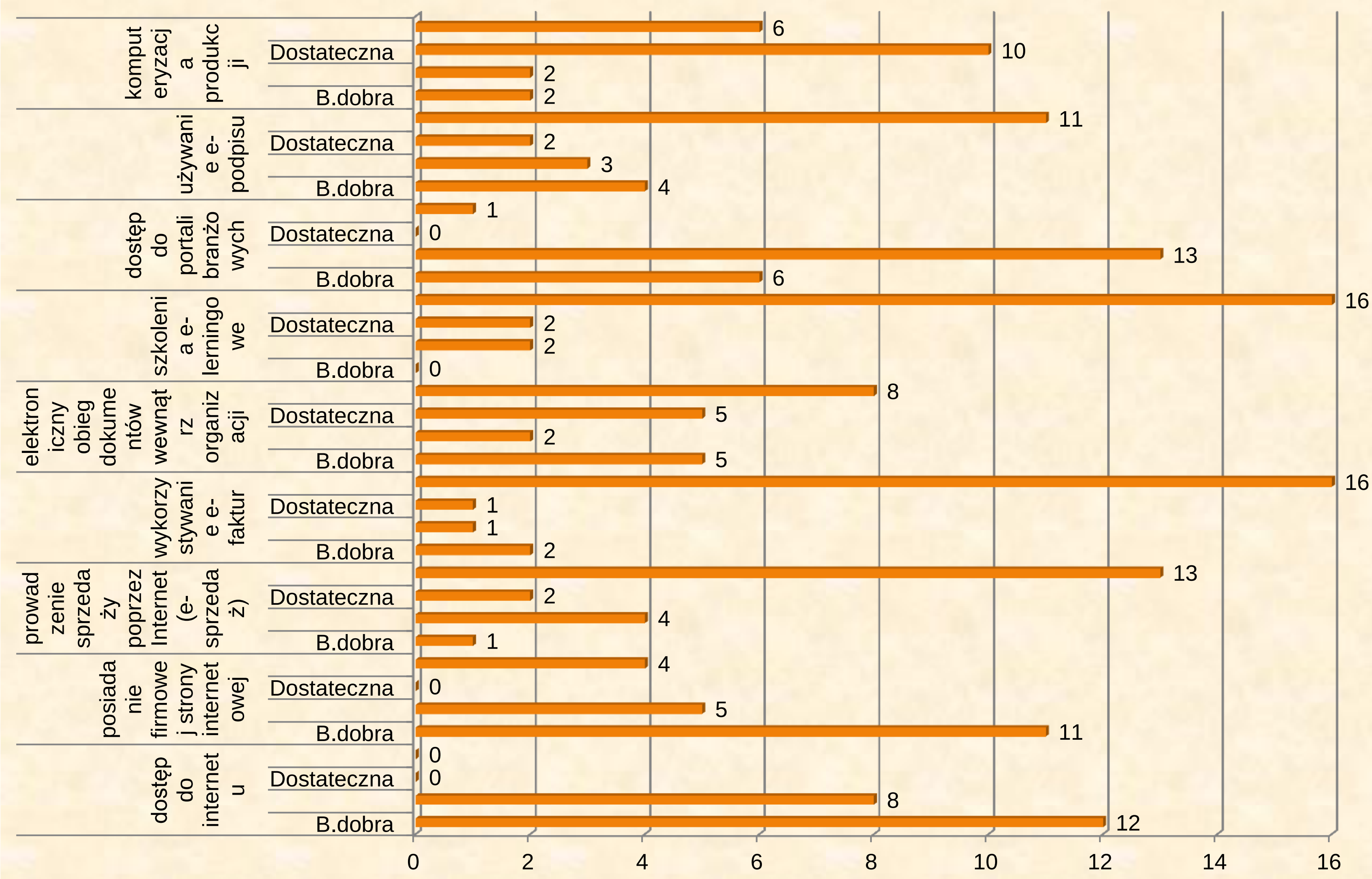
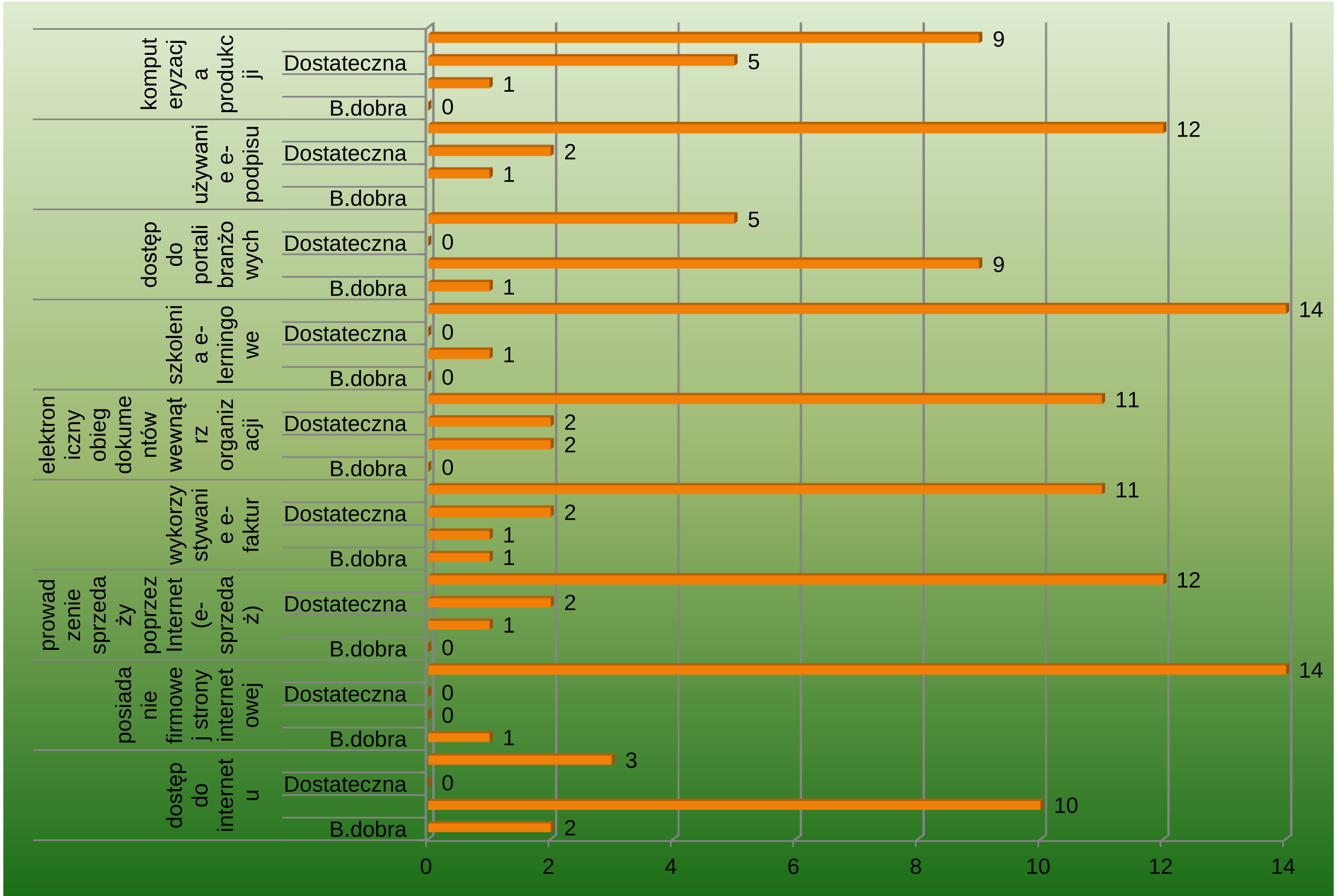


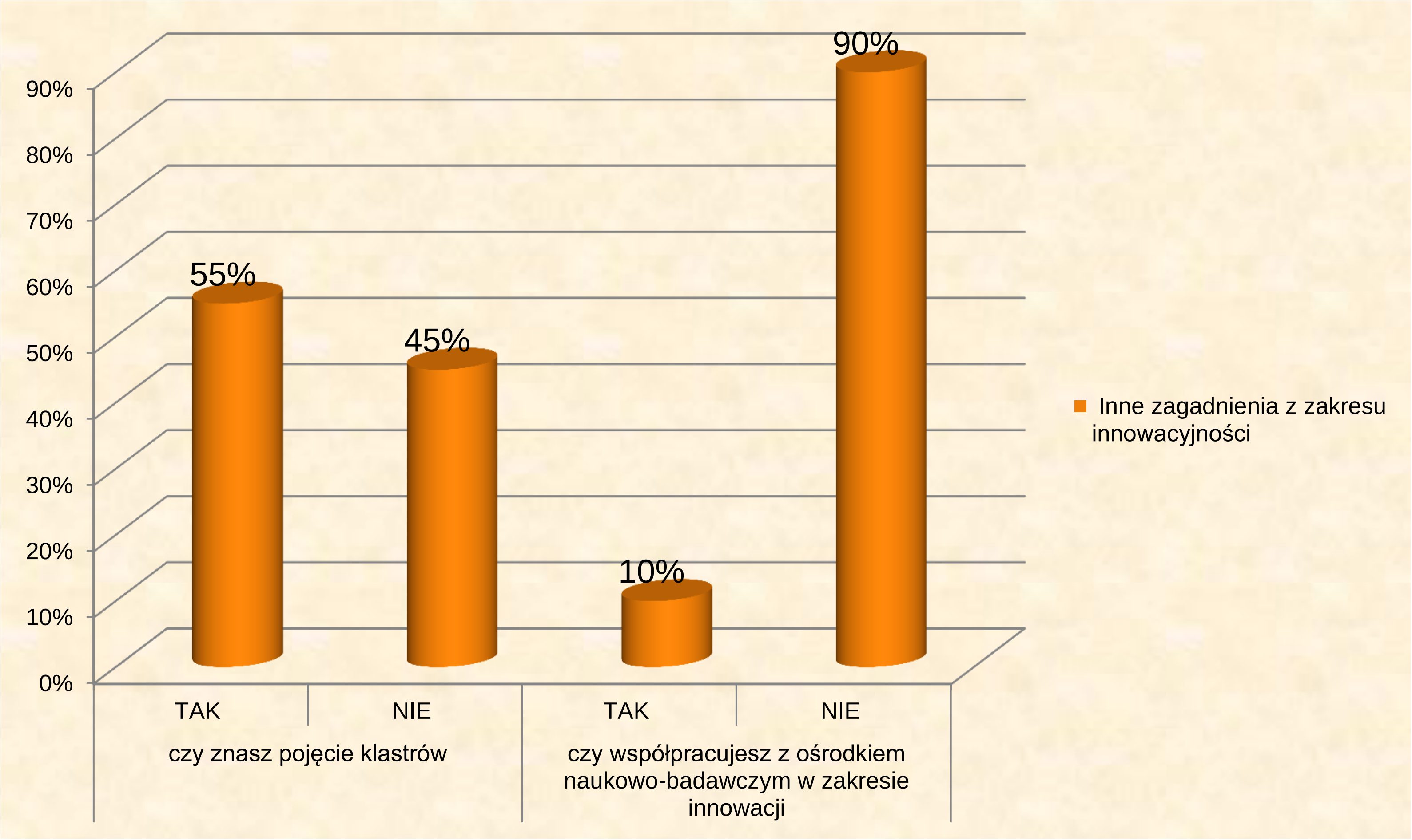
Wykorzystanie technologii ICT



Wykorzystanie technologii ICT



Inne zagadnienia z zakresu innowacyjności



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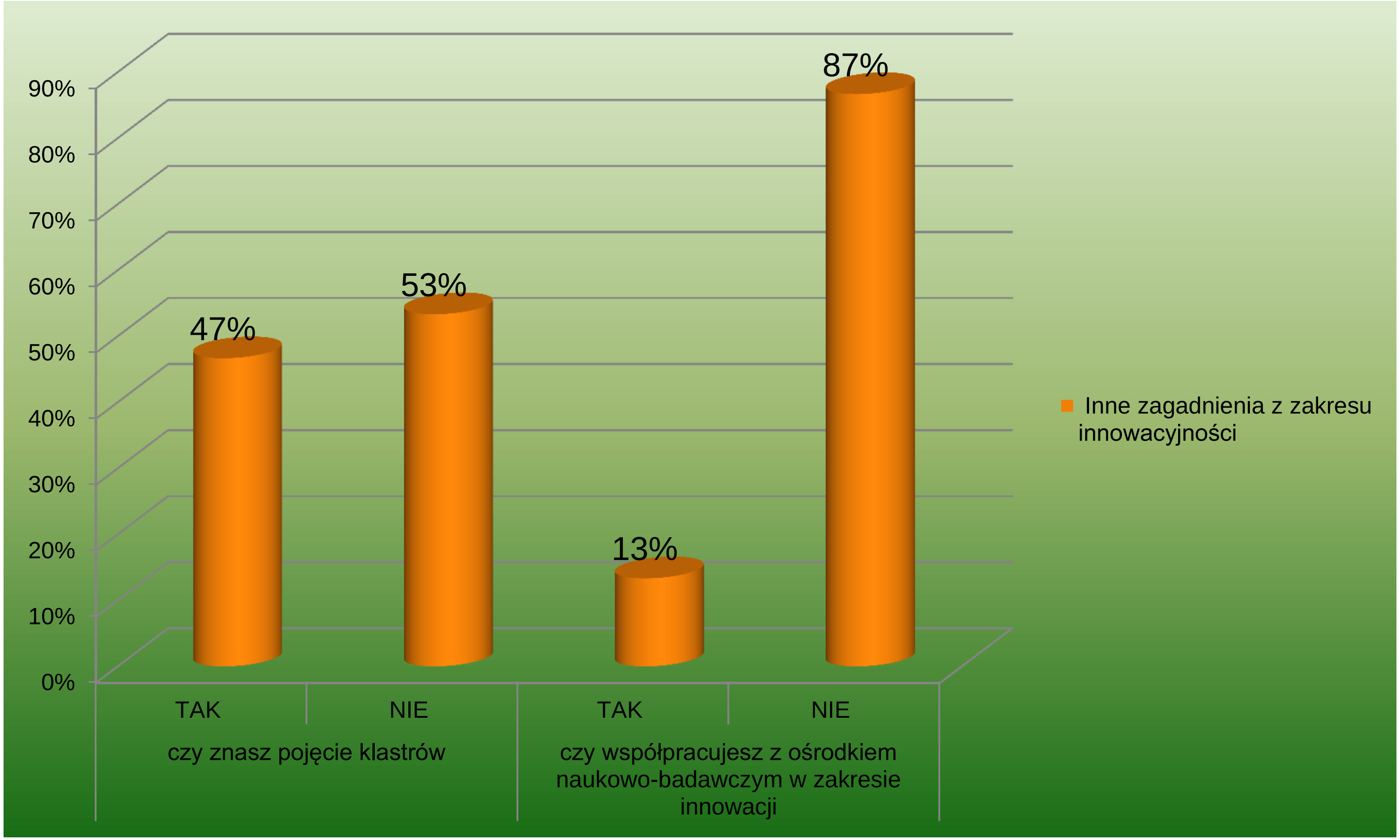

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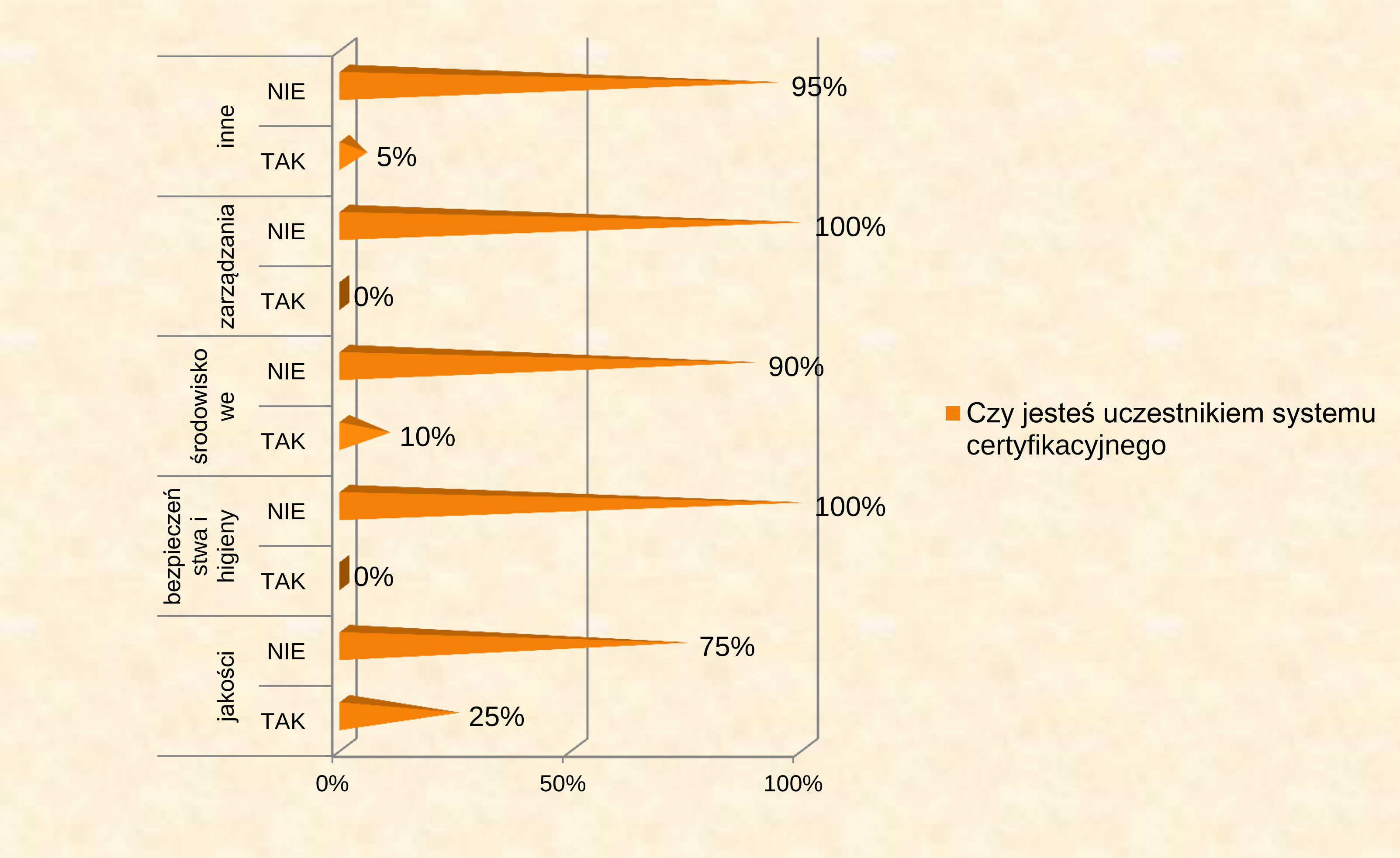

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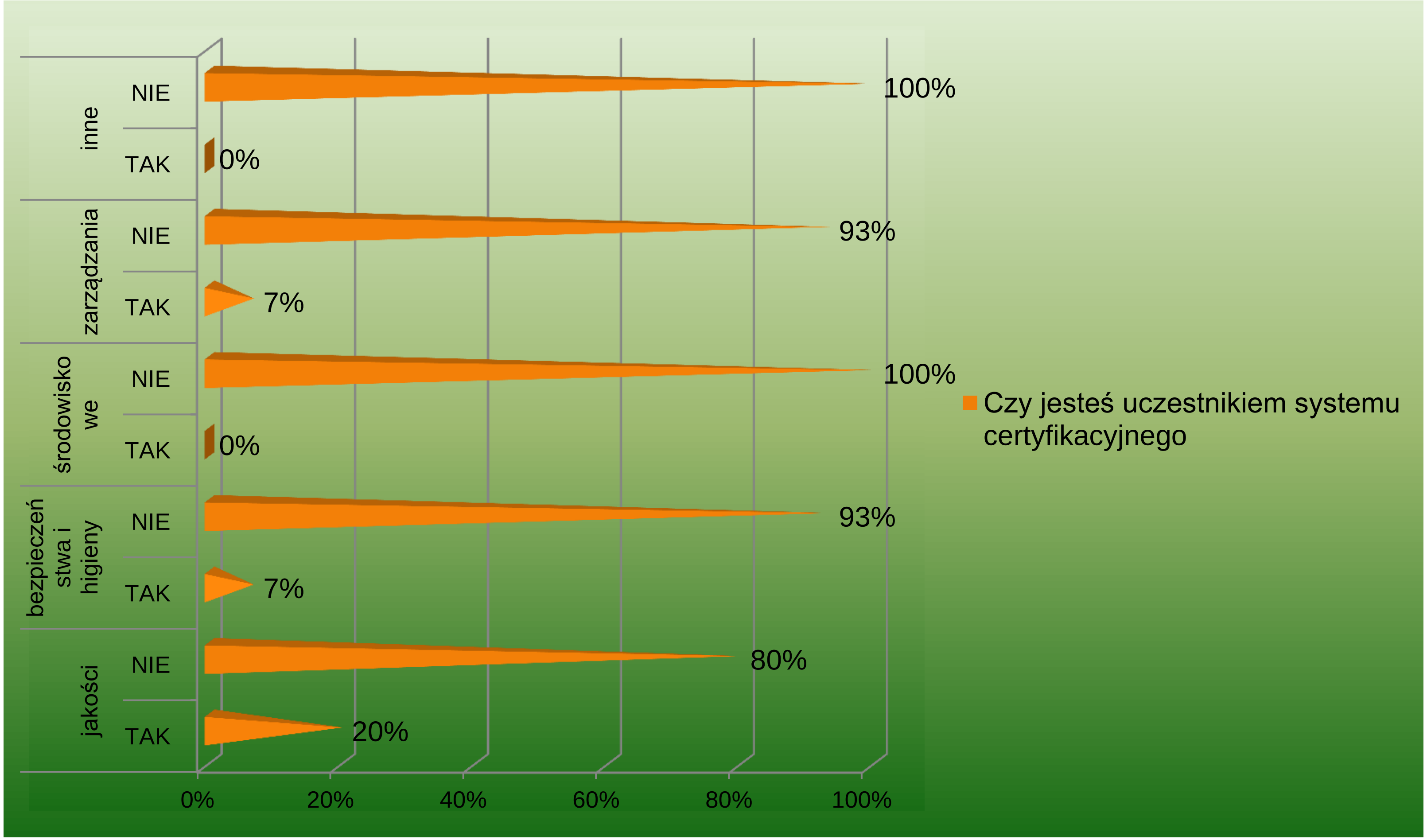
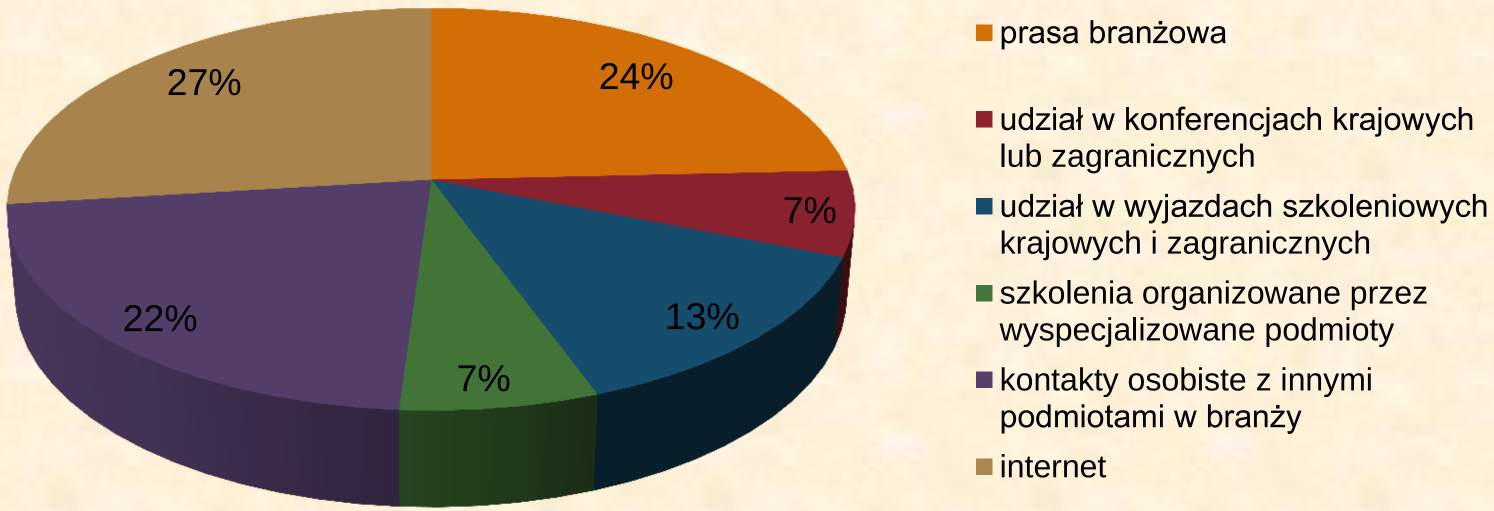
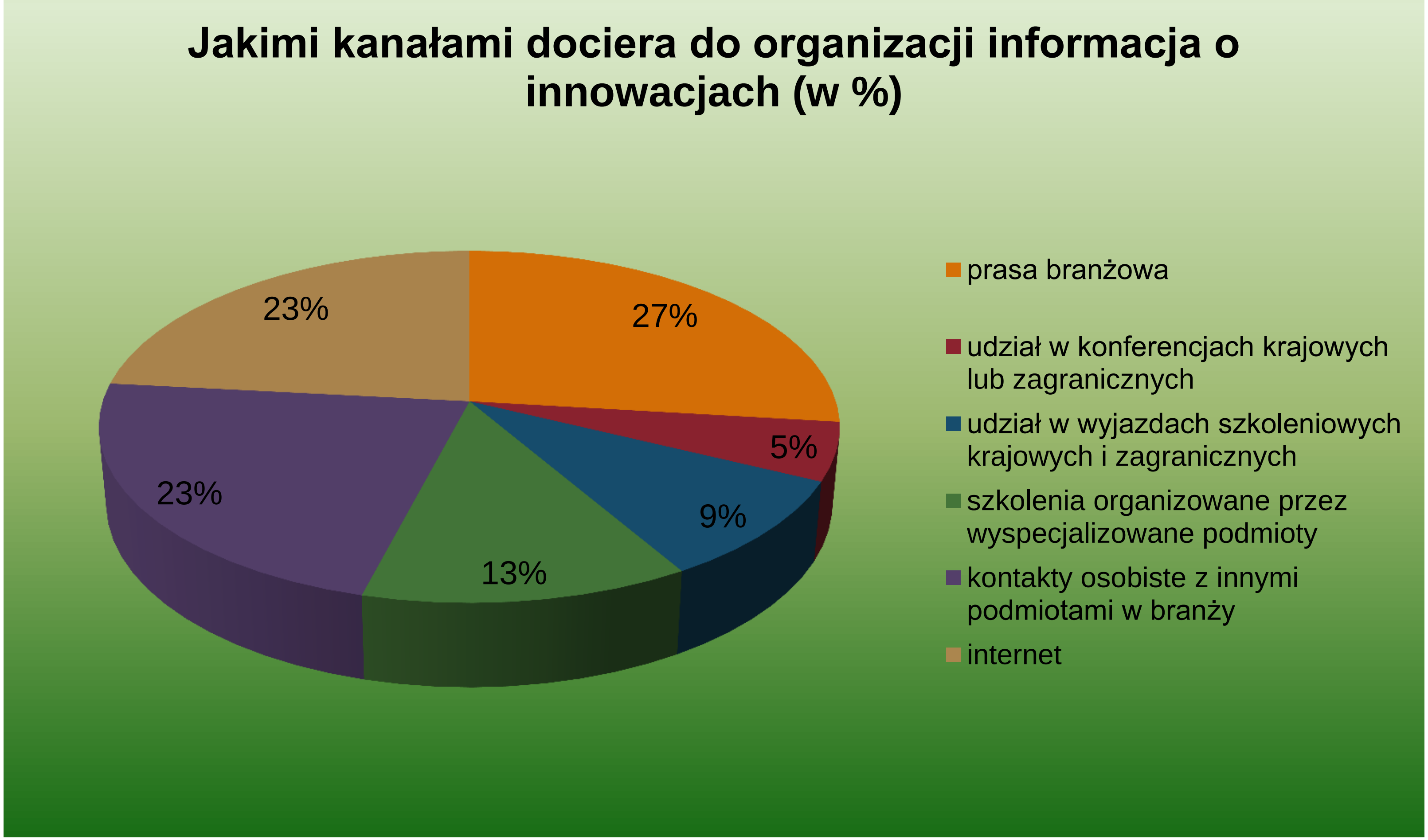


Inne zagadnienia z zakresu innowacyjności

Jakimi kanałami dociera do organizacji informacja o innowacjach (w %)

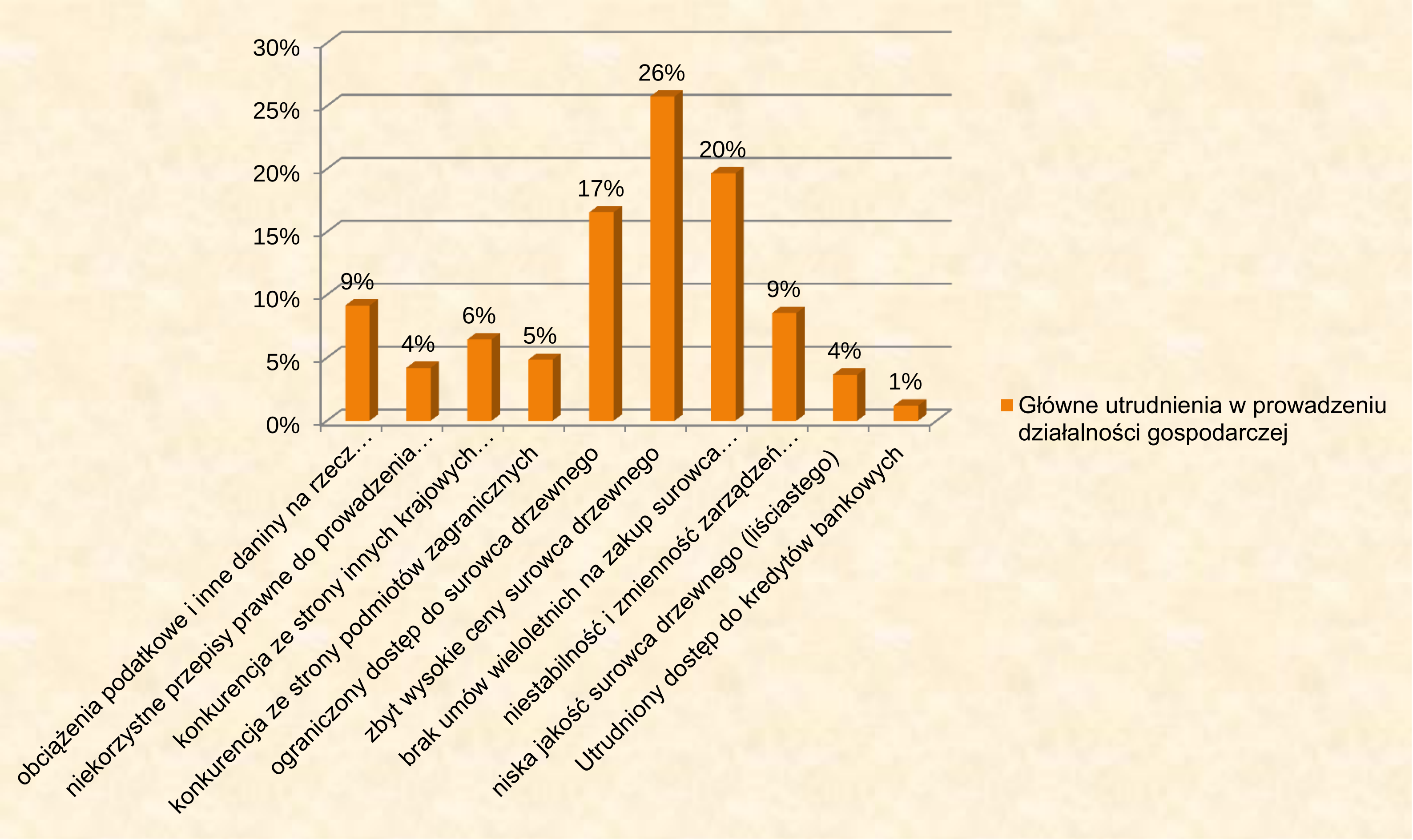


Inne zagadnienia z zakresu innowacyjności

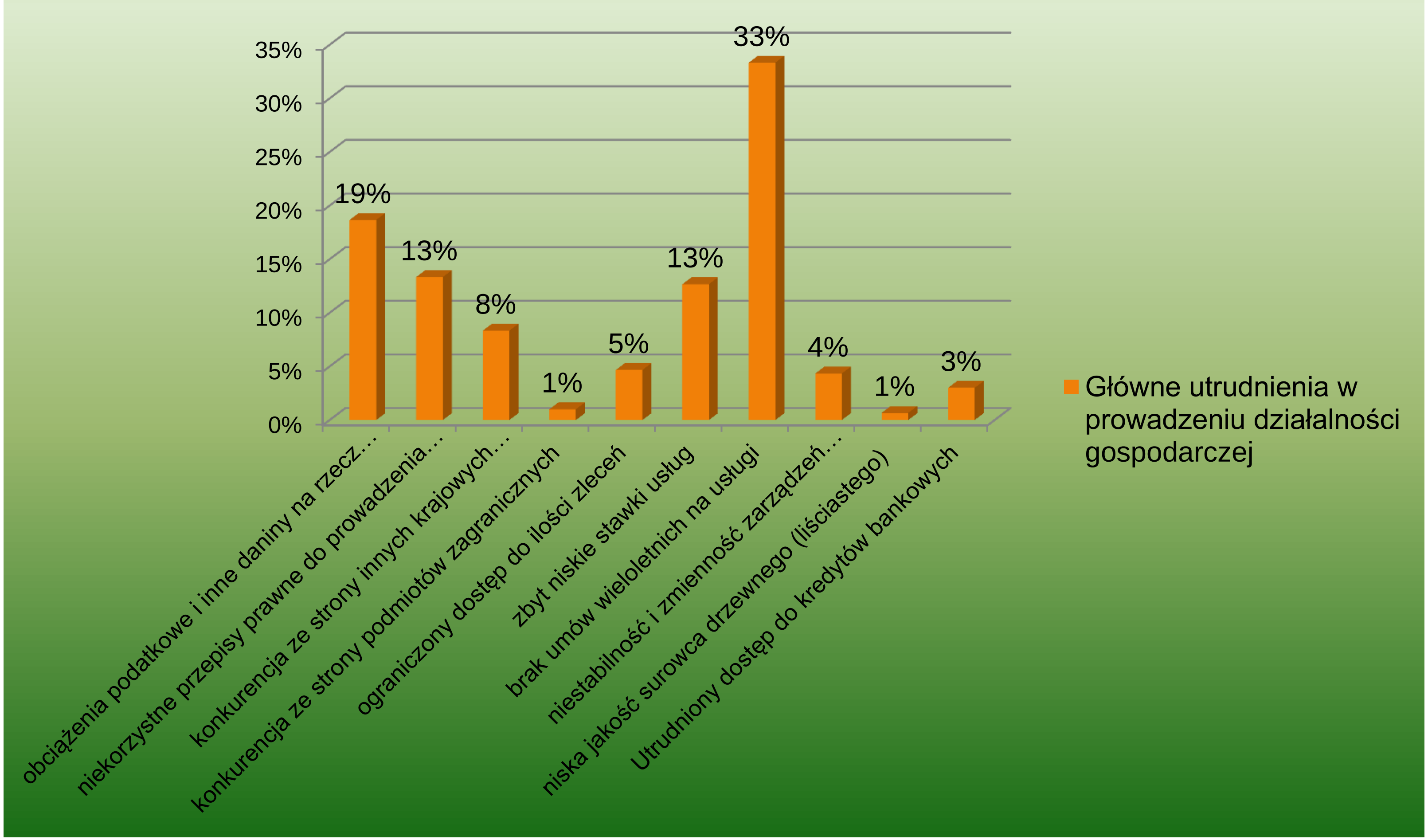


Identyfikacja barier w prowadzeniu działalności gospodarczej

Główne utrudnienia w prowadzeniu działalności gospodarczej



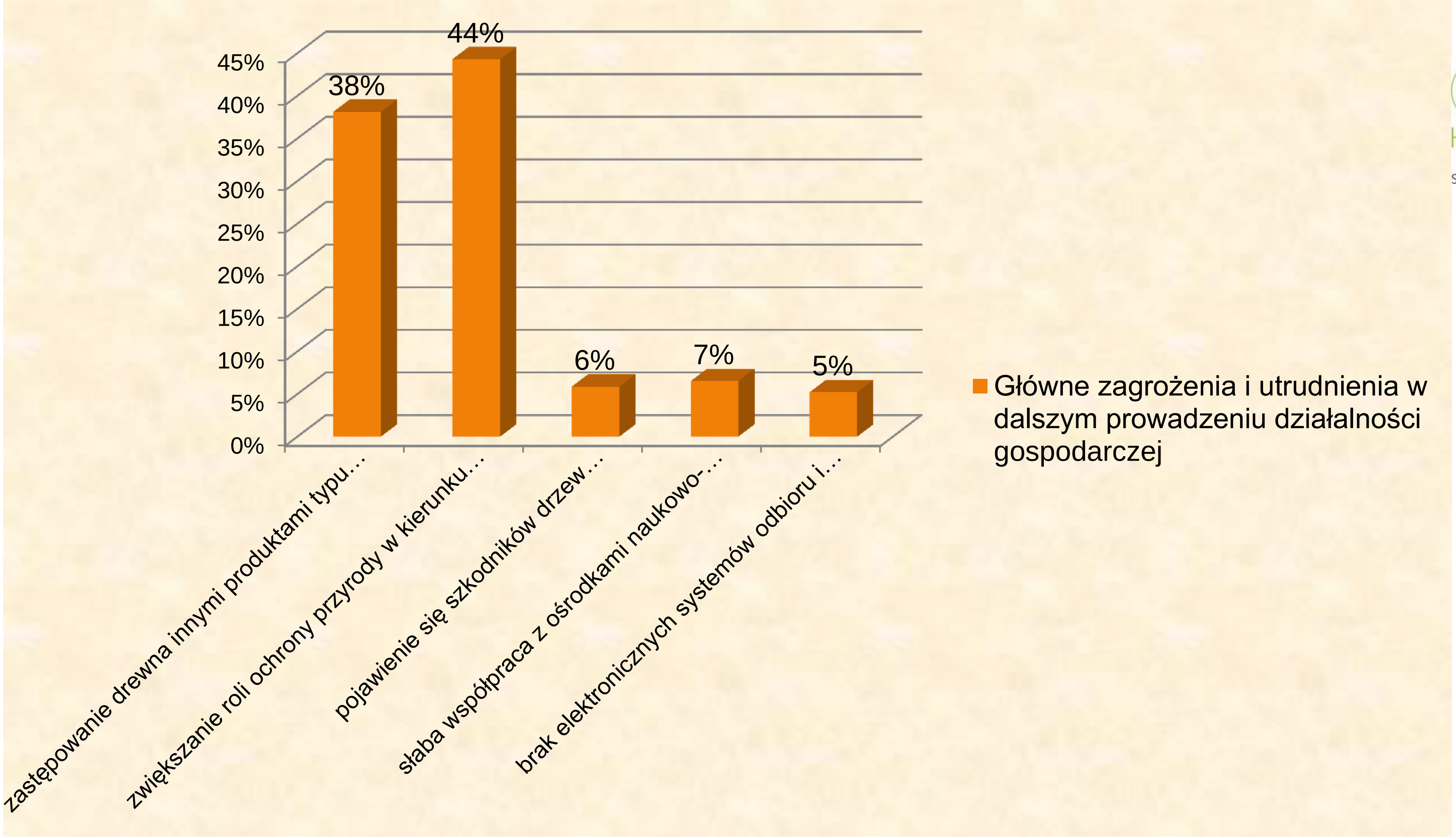
Główne utrudnienia w prowadzeniu działalności gospodarczej



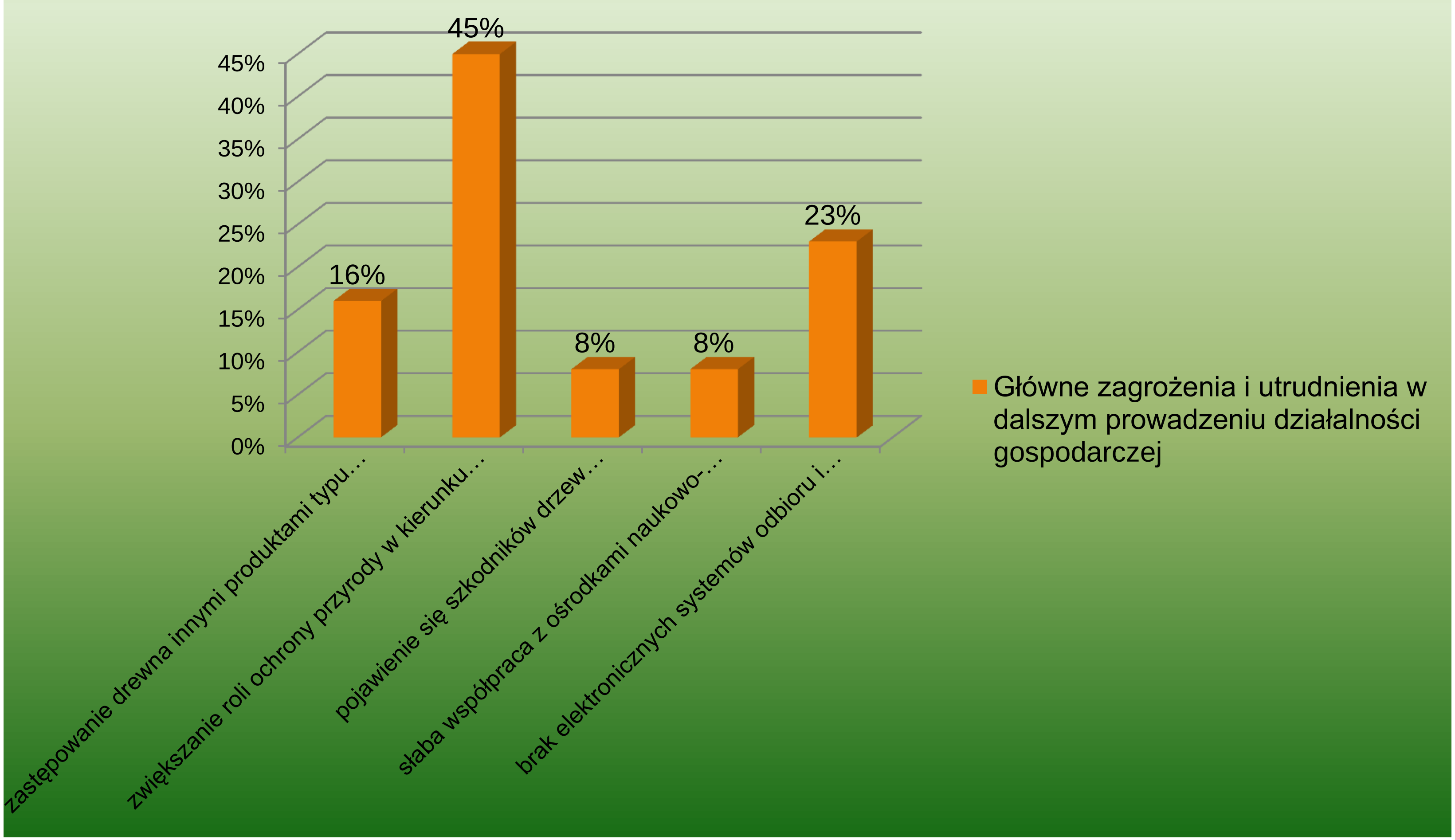
South Baltic PROGRAMME

HARDWOODS ARE GOOD SUPPORTING ENTREPRENEURS

Główne zagrożenia i utrudnienia w dalszym prowadzeniu działalności gospodarczej

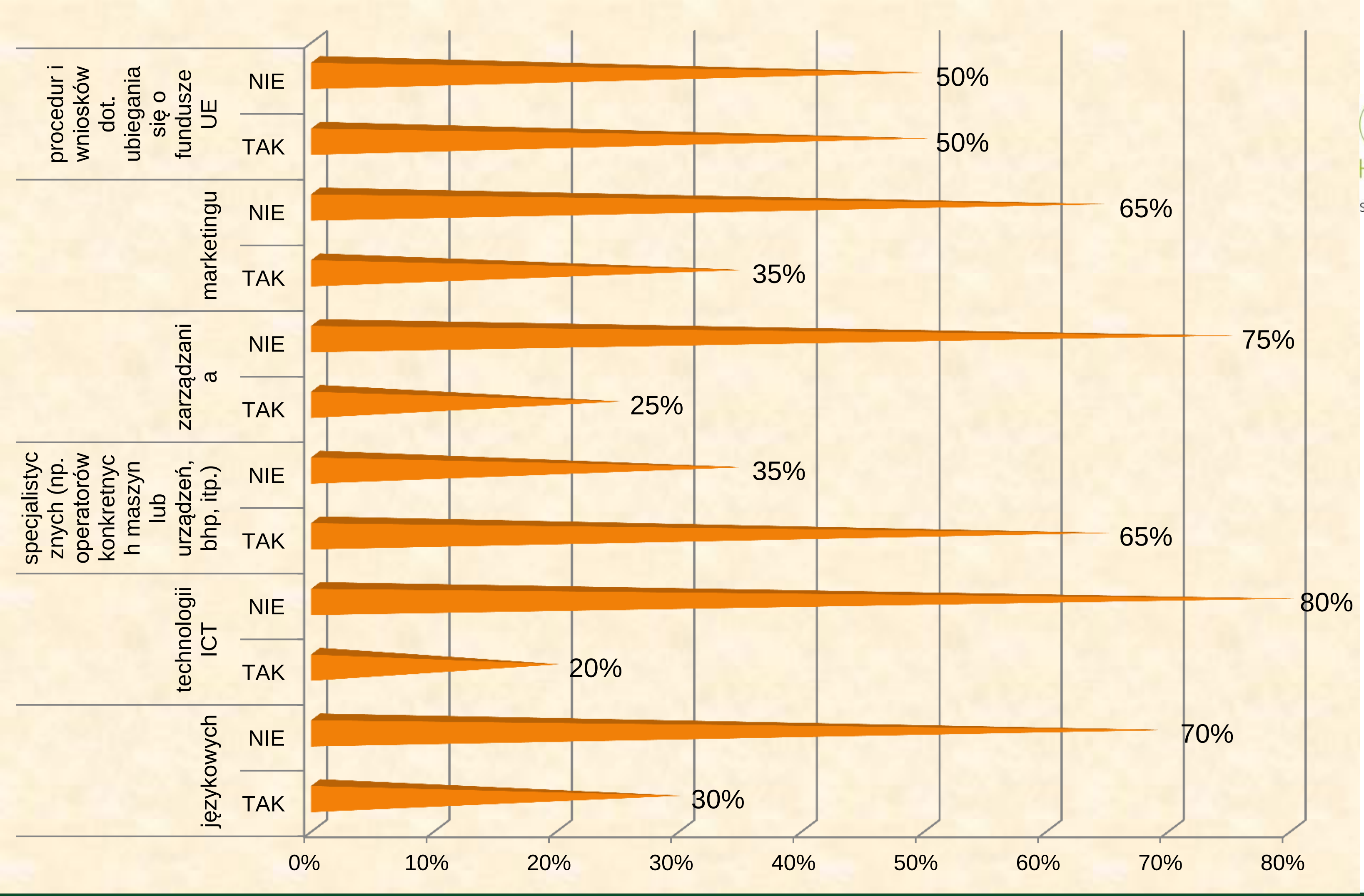


Główne zagrożenia i utrudnienia w dalszym prowadzeniu działalności gospodarczej

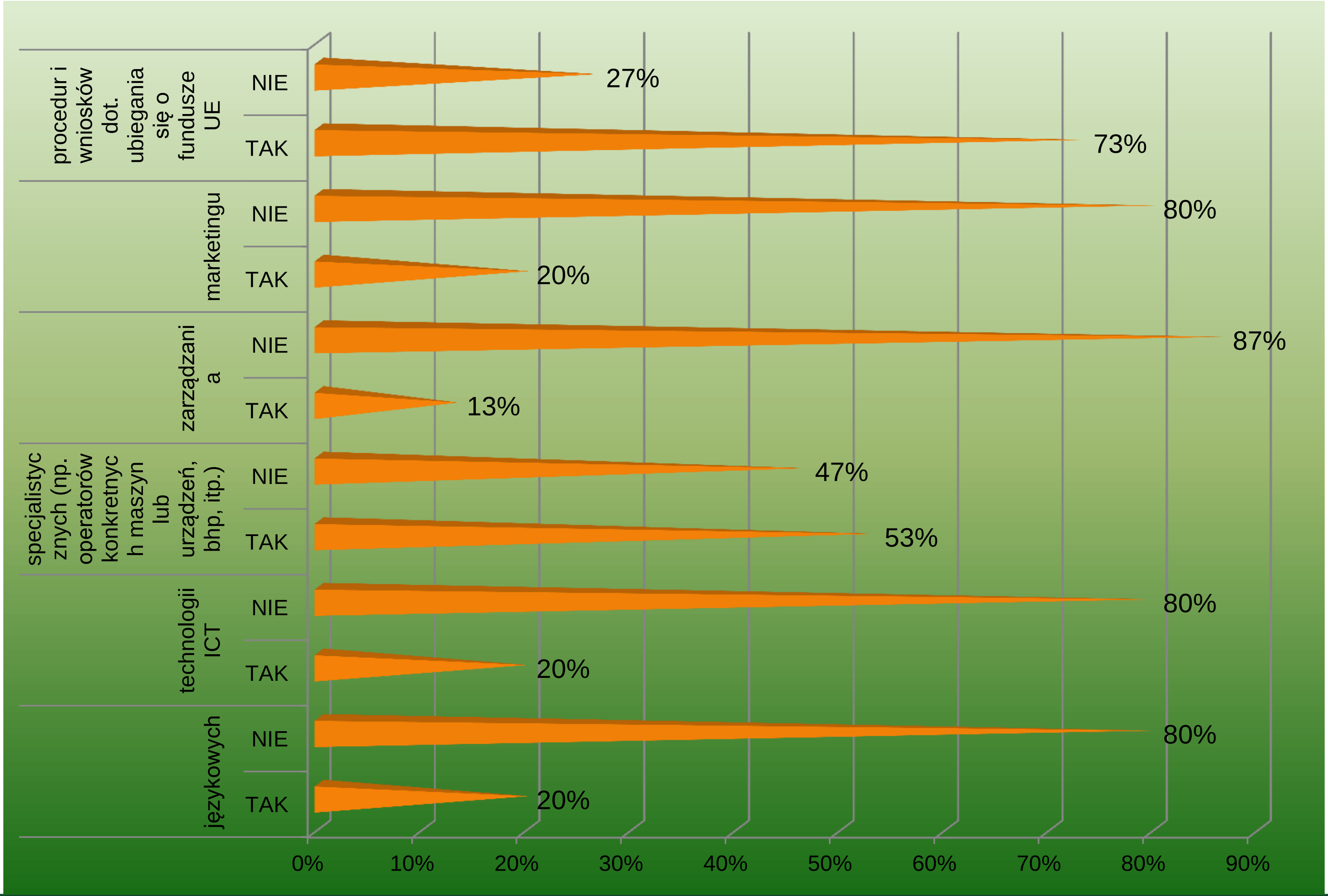


Identyfikacja potrzeb przedsiębiorstw

Potrzeby szkoleniowe



Potrzeby szkoleniowe



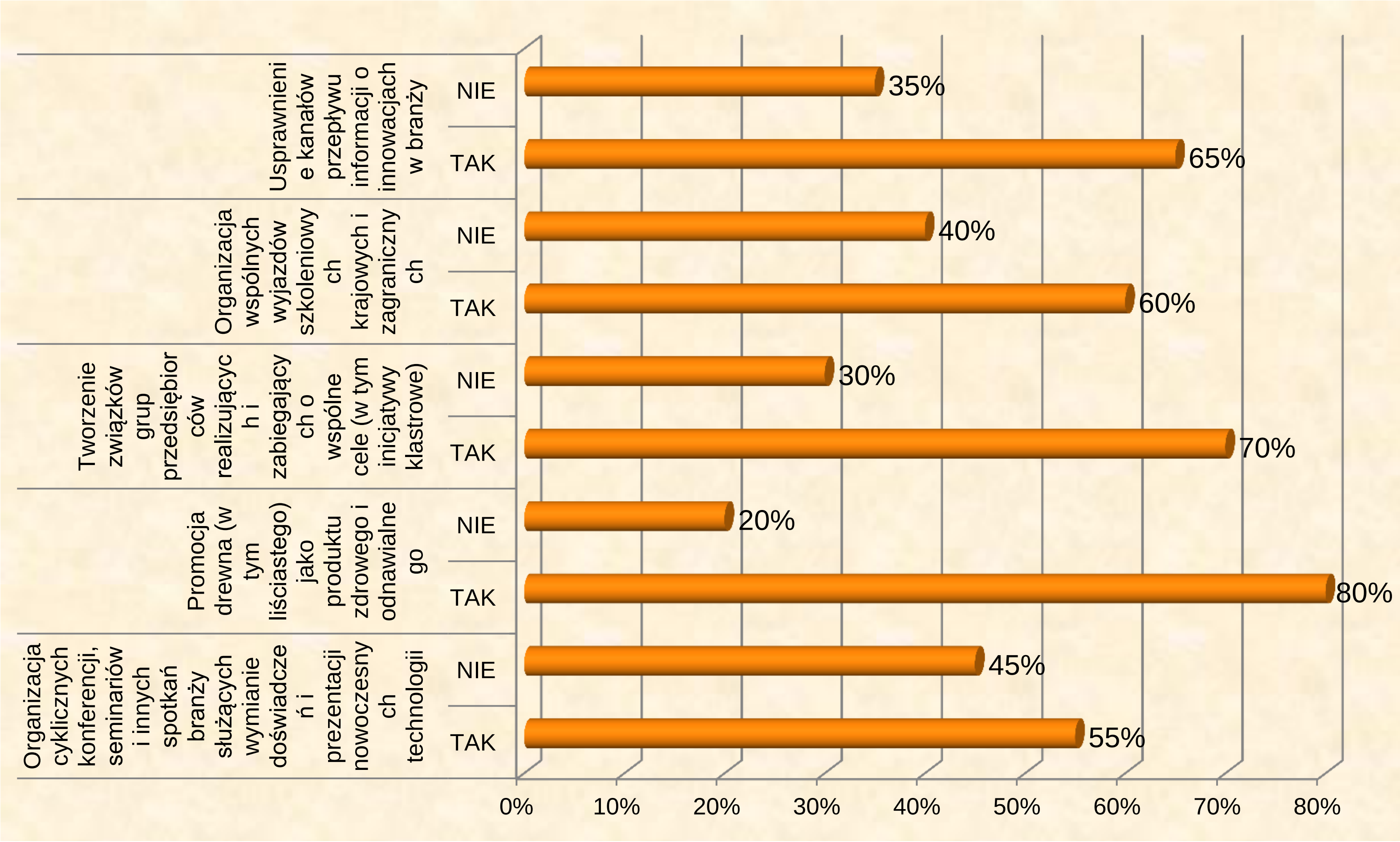
Zapotrzebowanie na środki pomocowe z UE

- **Programy inwestycyjne**
- Przemysł drzewny - 11 (1,1 mln zł)
- Zakłady Usług leśnych - 17 (5 mln zł)

- **Programy szkoleniowe**
- Przemysł drzewny - 8 (29 tys. Zł)
- Zakłady Usług leśnych - 14 (100 tys. zł)

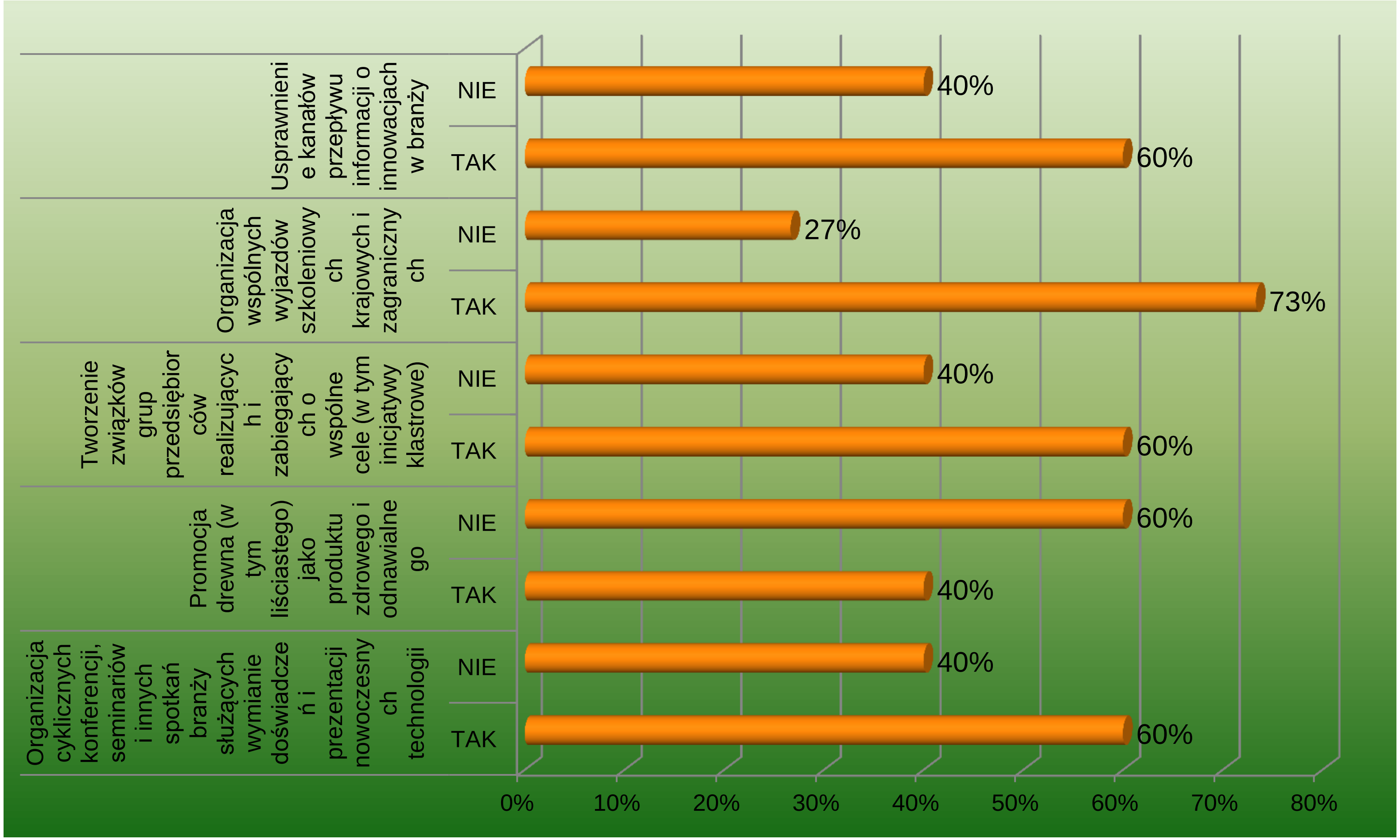
- **Wspierające typu analizy, promocje, targi i inne**
- Przemysł drzewny - 1 (10 tys. zł)
- Zakłady Usług leśnych - 2 (10 tys. zł)

Inne potrzeby organizacji



Państwowe Gospodarstwo Leśne
Lasy Państwowe

Inne potrzeby organizacji



Thank you for your attention

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mob. +48 694 493 721

Państwowe Gospodarstwo Leśne
Lasy Państwowe

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fax +48 58 30 21 125