

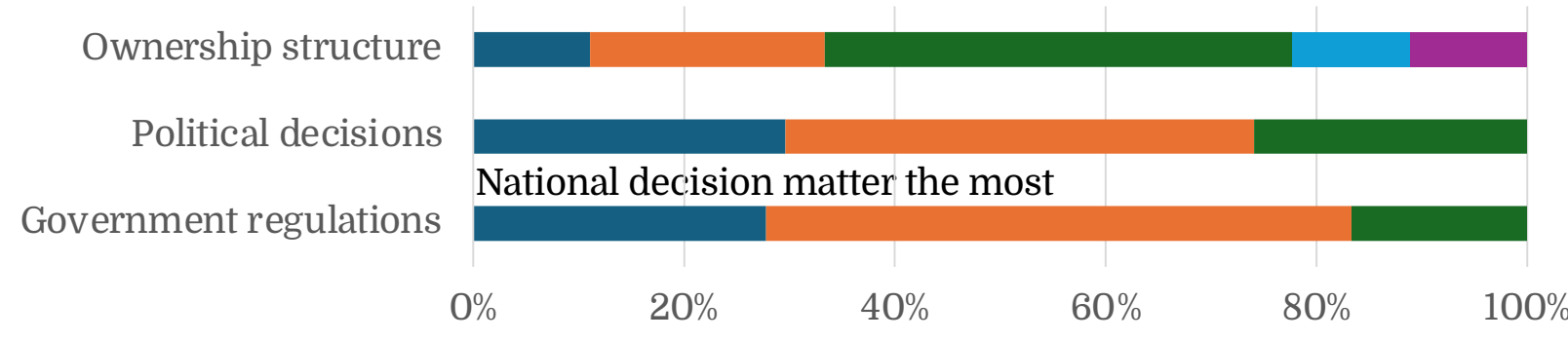
## WP 6:5 Estonia – most factors affect forest stakeholders

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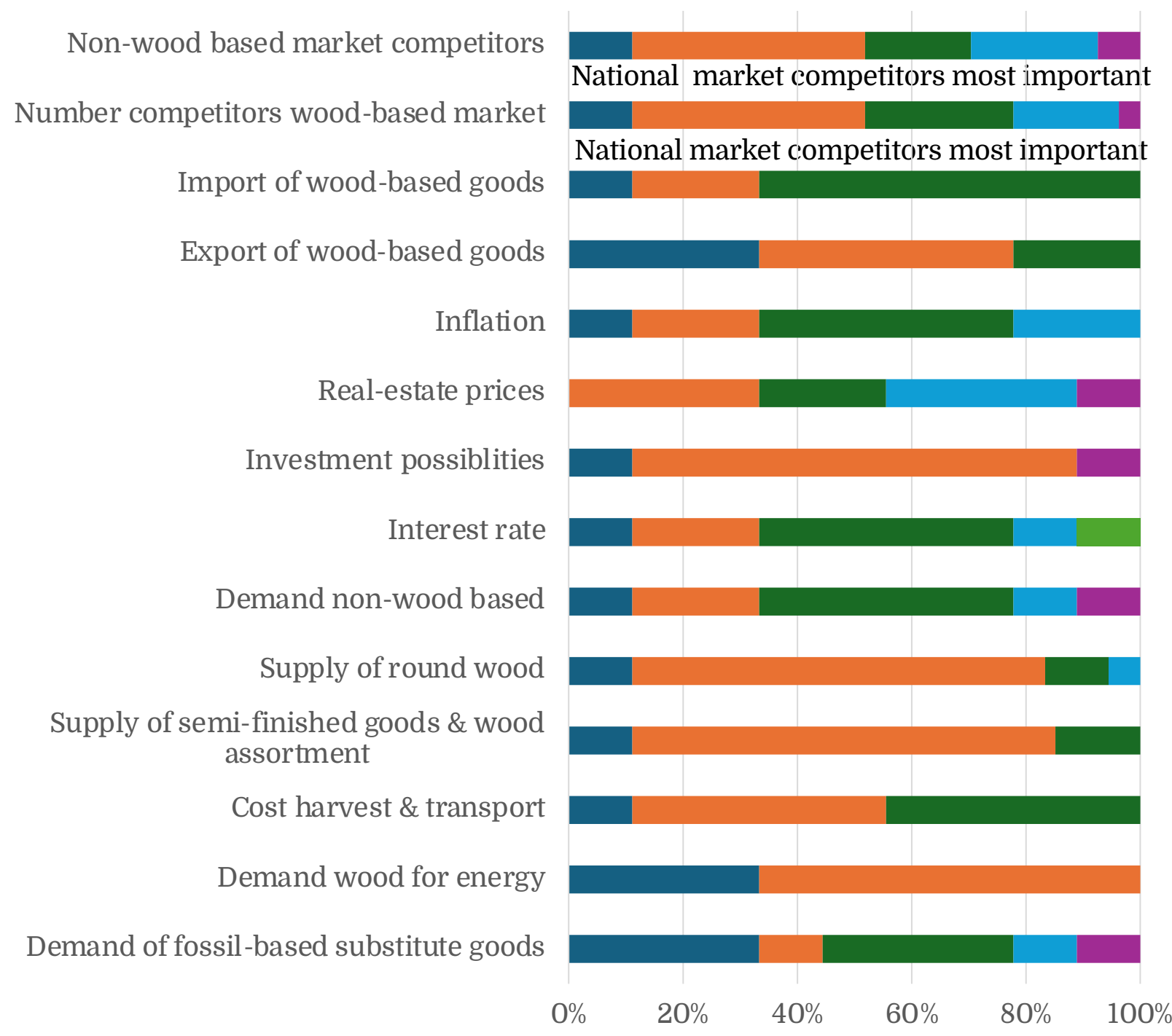
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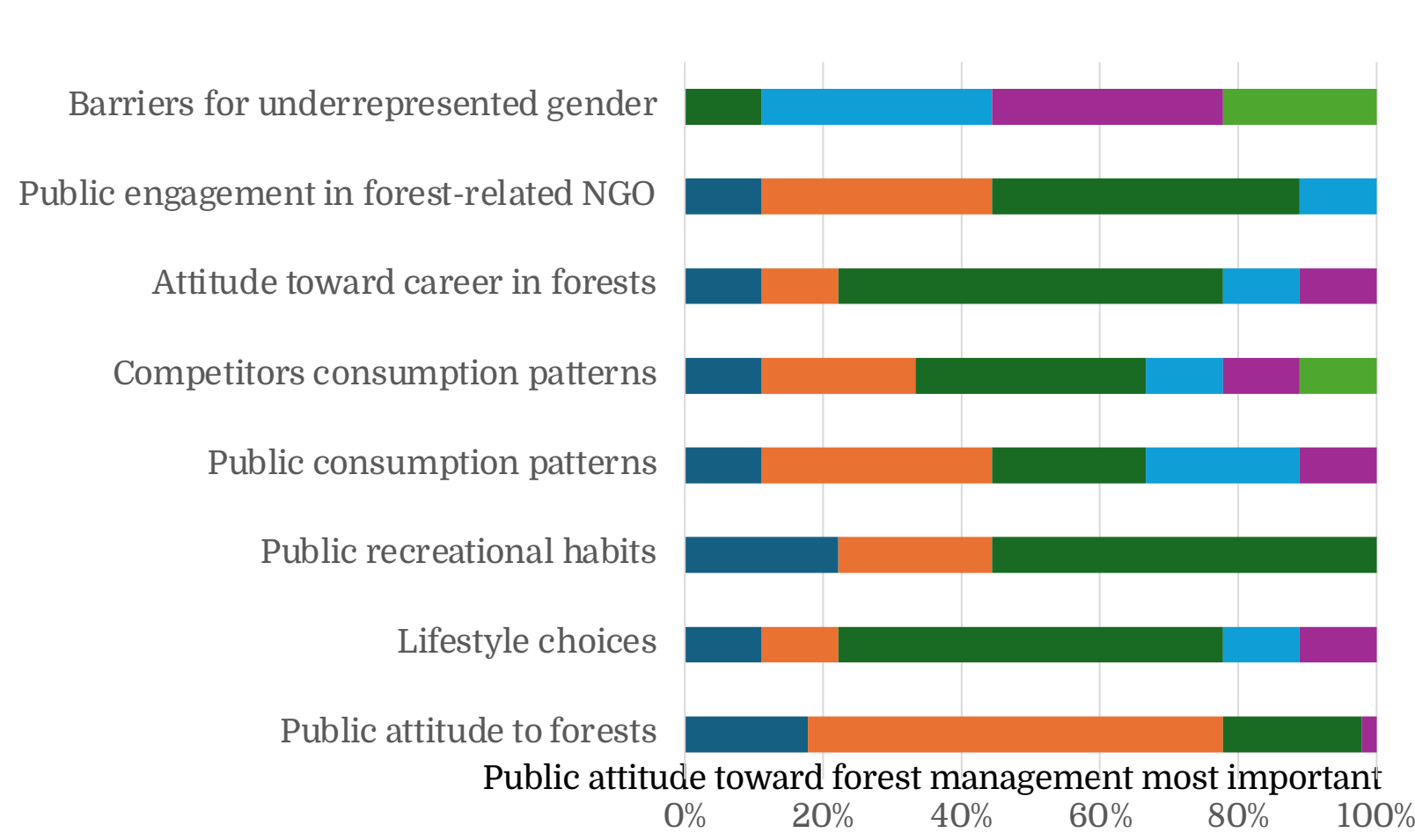
### Political sub-factors



### Economic sub-factors



### Social sub-factors



### PESTEL analysis builds upon discussions with stakeholders

In Estonia, stakeholders are affected by all PESTEL factors on sever or major levels. However, economic and technical factors are also mentioned as insignificant.

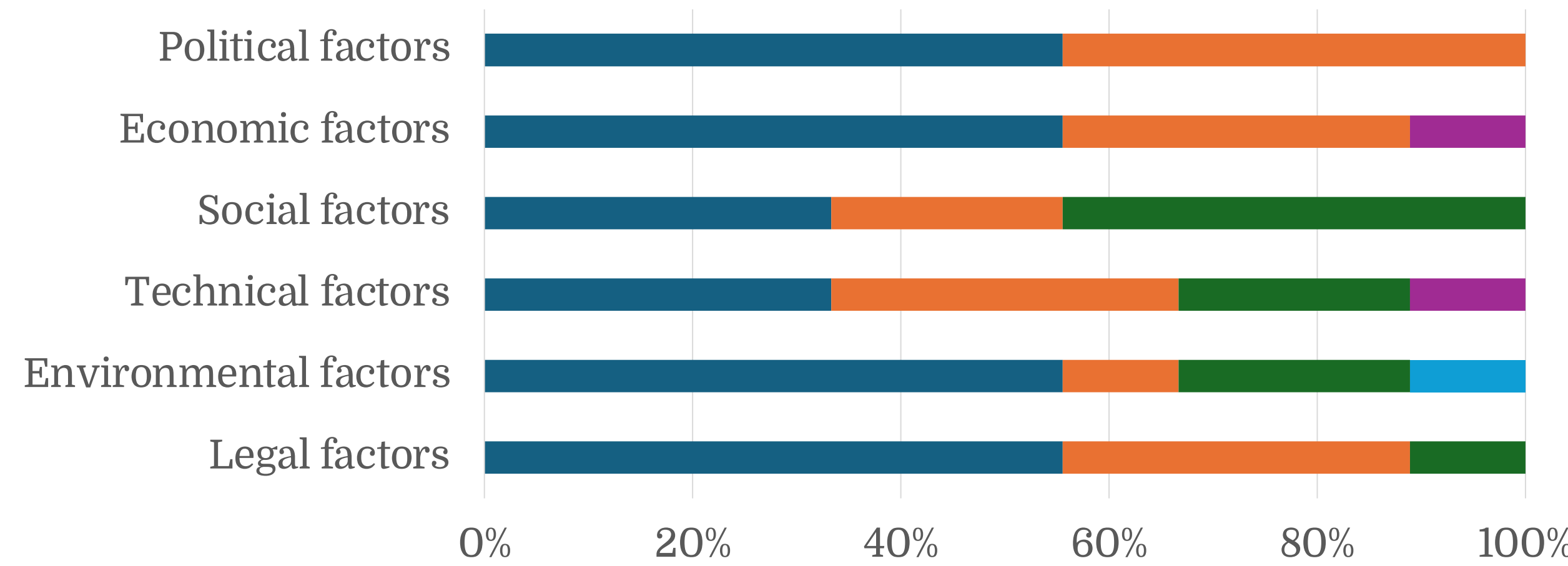
The political factor is the factor having largest effects on the stakeholder's activities, and the sub-factor show that government regulations are the most important together with political decisions on national level.

Demand for energy and export of wood-based goods are influential economic subfactors together with demand for fossil-based substitute goods.

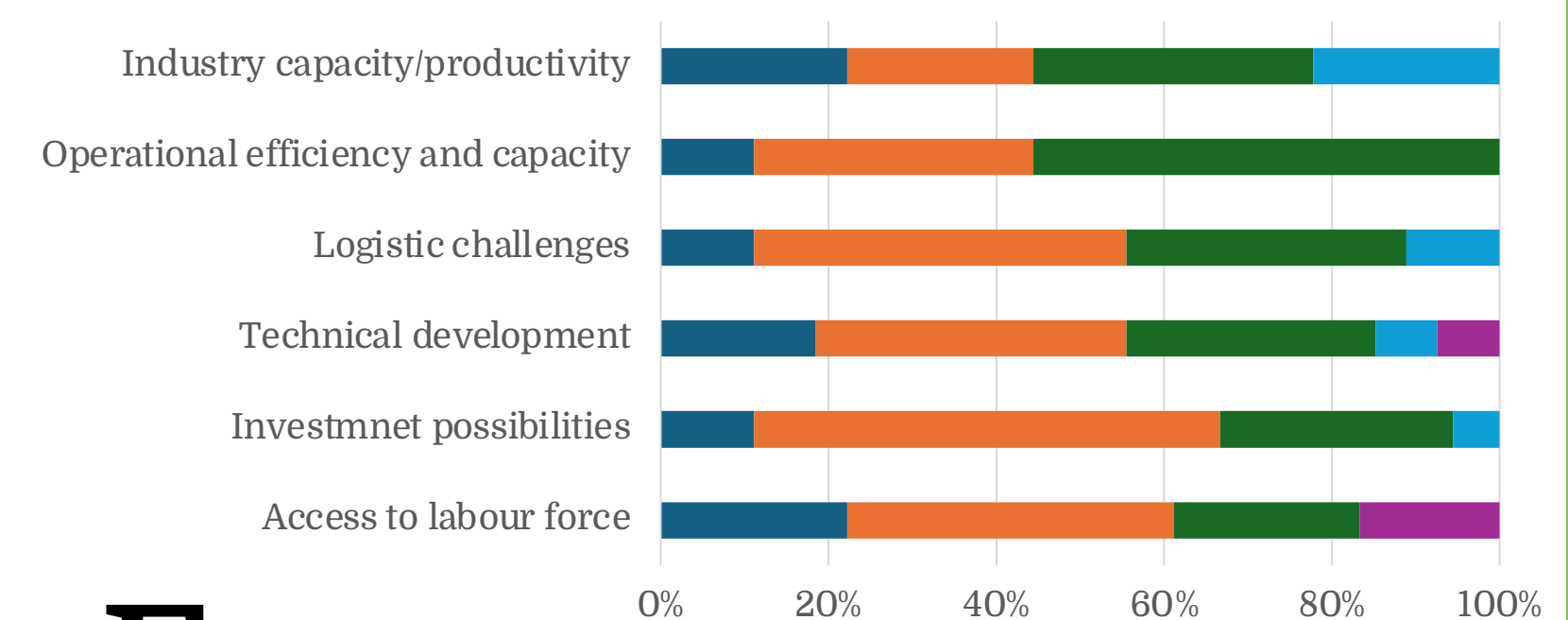
Among the environmental sub-factors, carbon storage policy are important to stakeholders. Additionally, effects and occurrence of nature disasters are important factors.

The social sub-factors that are most often stated by stakeholders to have little or no effect. Barriers for underrepresented gender has insignificant or no effect. Also, public or competitors' consumption patterns have low effect.

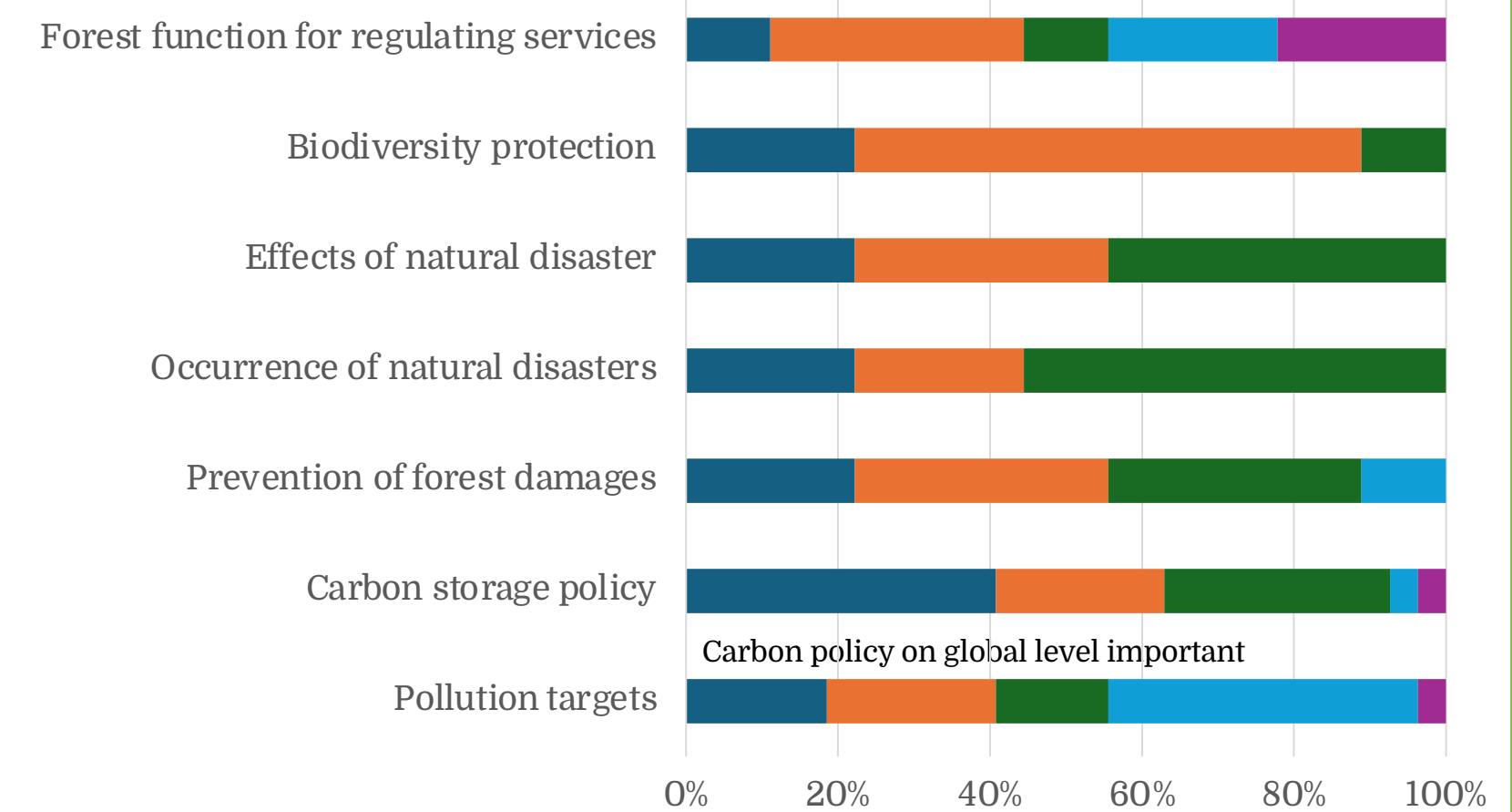
### Factors affecting stakeholders in Estonia



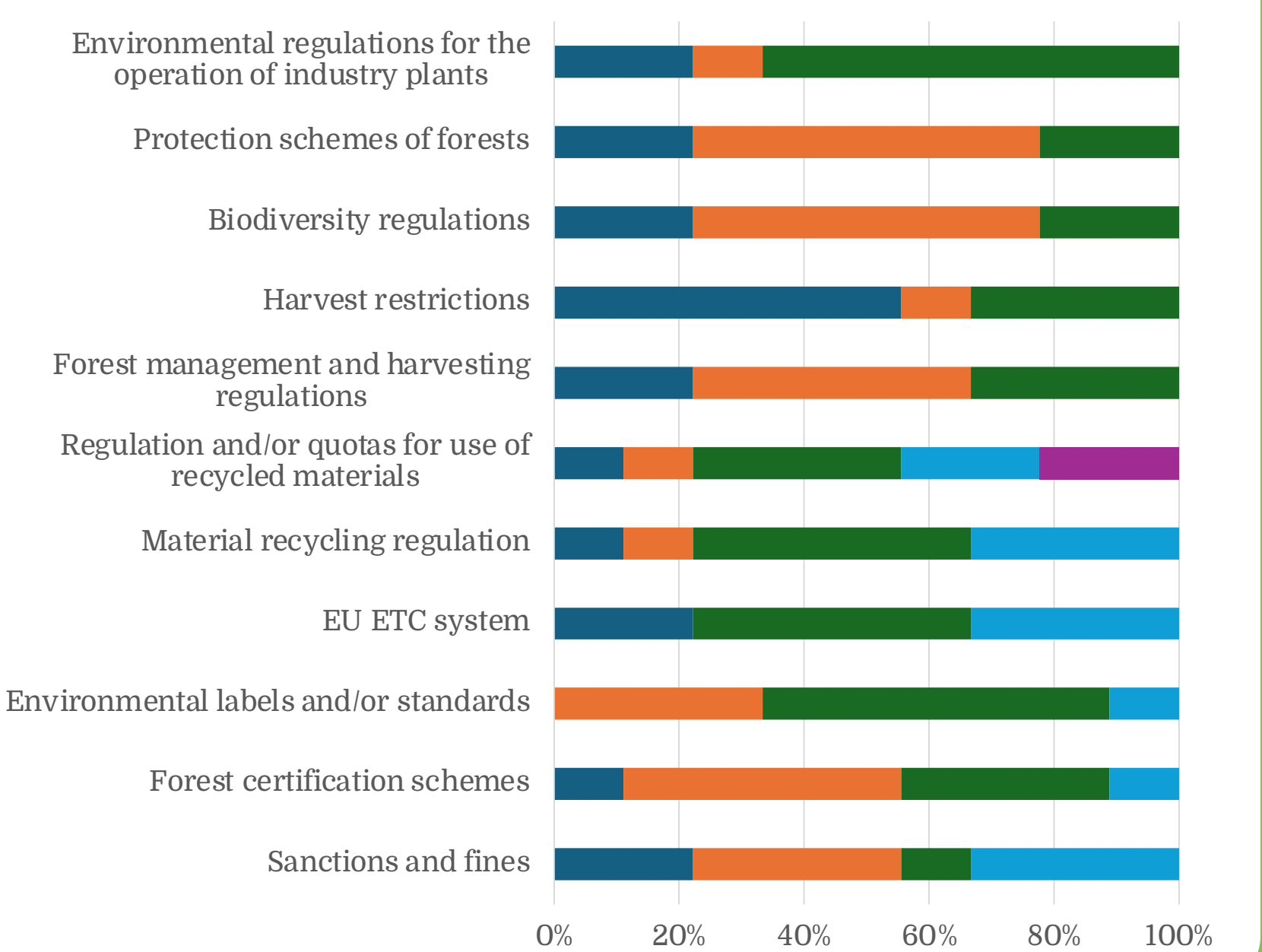
### Technical sub-factors



### Environmental sub-factors



### Legal sub-factors



■ Sever effect ■ Major effect ■ Moderat effect ■ Minor effect ■ Insignificant effect ■ No effect

### Scenarios in Estonia

From the PESTEL four scenarios was developed describing possible future developments of the forest and forest wood value chain in Estonia. A common view of the four storylines are that climate is a primary focus together with the development of biobased society and technical innovation along the wood value chain.

**Vision:** Strong regulation to promote protection of forests for carbon storage and biodiversity protection.

**Attitudes:** eco-awareness is high in society, promoting nature conservation and protection, recreation is important.

**Wood-value chain market development:** low demand for wood-based products, supply increase moderately

**Industrial development:** declining wood-based industry due to less supply.

**Labor:** high competition of skill labor, increase forest-related education.

**Vision:** balancing conflicting demands of forests

**Attitudes:** priority of timber production and recreation, preserving forests as well as supporting wood value chain.

**Wood-value chain market development:** short-term shortage of timber due to Russian market limitations, high price of wood, fuel wood for energy important

**Industrial development:** status quo in technological development, wood-processing industries increase.

**Labor:** shortage of qualified labor.

**Vision:** green transition using intensified forest management and strong industrial development, shifting forest ownership.

**Attitudes:** support of green transition supported by strong forest management

**Wood-value chain market development:** increase supply due to ownership shifts, increase of supply for wood-based and non-wood-based goods and services.

**Industrial development:** status quo in technological development, wood-processing industries increase.

**Labor:** lack of skilled workers, especially experts.

**Vision:** Society in green transformation in a strong forest sector.

**Attitudes:** support forest wood value chain and the green transition using the forest, balancing conservation, and timber harvest.

**Wood-value chain market development:** high demand for timber, supply however decreasing long-term due to forest's age structure.

**Industrial development:** development of technology enables innovation-based industry to develop in a high degree of digitalization.

**Labor:** attractive sector and with education the supply of skilled labor cover the needs of the industry.