

Deliverable N° 3.1

Research Stakeholders Workshop

Lead participant: European Forest Institute

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Publishable abstract: This is a strategic document that identifies and defines the research gaps for transnational research funding. A research strategic workshop has been organised to define research topics for transnational funding and provide strategic guidance to forest research coordination activities.

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1. Overview

One of the main objectives of WP3 is to develop FORESTERRA's Strategic Plan in order to define the most strategic research themes for implementing joint activities and research projects.

This deliverable presents the results of the consultation process that has been undertaken, using a bottom-up approach, in order to define the research themes for future common joint activities and transnational research funding.

The process of defining topics for joint calls has been based on (1) a bottom-up call for research ideas conducted via email, and (2) an interactive scientific workshop involving all consortium members and invited representatives of research organizations (involving all disciplines relevant to forest research) from most Mediterranean countries as well as other Mediterranean climate areas (California and Australia).

The research Stakeholders workshop, which had been planned for Month 14, was brought forward to Month 6 and took place in Tunis, Tunisia, on 13 June 2012. The FORESTERRA Project Management Team decided to change the dates in order to take advantage of the EFIMED Annual Meeting, which is the largest Mediterranean forest research gathering during the year. In this way, the FORESTERRA workshop benefitted from the presence of scientists from various disciplines from all over the Mediterranean and beyond.

The process and results of the different steps are described in the following pages.

Several ideas emphasised the need to integrate knowledge to develop adaptive measures (from restoration to management) in order to foster the resilience of forest ecosystems and the services they provide. Some focused on acquiring the scientific knowledge needed for the sustainable management of multi-purpose trees and landscapes (agro-silvo-pastoral interface) to enhance the role of non-wood products in rural development.

Other ideas were focused on issues of policy, institutional and socio-economic aspects as well as the motivation of stakeholders regarding payments for environmental services and their implication for their design. Finally, the need was established for improved and integrated knowledge on water and forest interactions at different scales. This topic was also partially addressed as a cross-cutting issue by several proposed ideas.

Based on this broad consultation and the high number of research ideas, EFIMED Scientific Advisory Group devised four main multi-disciplinary and cross-cutting research themes that could address the most important gaps in knowledge and scientific challenges identified in the call for ideas. These are:

- Understanding global change drivers, indicators and impacts on Mediterranean forest ecosystems: a Mediterranean-scale approach
- Fostering forest system resilience through managing biodiversity, from genes to communities
- Multi-purpose forest landscapes management to enhance the role of non-wood products and related ecosystem services in rural development
- Integrated watershed management for delivering forest water-related services

These themes were brought for detailed discussions and further elaboration to the Scientific Workshop organised in Tunis.

3. FORESTERRA Strategic Workshop

With over 90 participants attending the FORESTERRA workshop, there was an enhanced opportunity for scientists from across the Mediterranean region and from countries further afield to discuss the background, scope and impacts of the potential four research themes face to face, while giving more time to the development of a more informed strategic plan.

During the workshop, four cross-cutting themes were discussed in small working groups, through interactive and iterative group work. For each of the four themes, group work focused on keywords, as well as on identifying knowledge gaps regarding the understanding of the theme and on the challenges for managing and governing Mediterranean forests within these four cross-cutting themes. The programme and list of participants are shown in the annexes of this document.

After the workshop, a draft strategic document was produced, based on the working group discussions; this was disseminated to EFIMED's network of over 800 stakeholders for additional comments.

The draft document, FORESTERRA Strategic Research Themes was discussed in October 2012 by the FORESTERRA Steering Committee and the FORESTERRA Stakeholders Advisory Group in Rome. After such wide consultation process, the FORESTERRA scientific plan, which will be the basis for the call for research proposals for transnational funding planned for 2013, will be developed.

4. FORESTERRA Strategic Research Themes

Based on the call for ideas and the scientific workshop, four cross-cutting strategic themes were proposed and elaborated:

- Understanding global change drivers, indicators and impacts on Mediterranean forest ecosystems: a Mediterranean-scale approach
- Fostering forest system resilience through managing biodiversity, from genes to communities
- Multi-purpose forest landscapes management to enhance the role of non-wood products and related ecosystem services in rural development
- Integrated watershed management for delivering forest water-related services

These four themes, described below, were also discussed and fine-tuned with FORESTERRA Stakeholder Advisory group, to be an input for the development of FORESTERRA strategic plan.

4.1. Understanding global change drivers, impacts & indicators on forest ecosystems: a Mediterranean-scale approach (Global Change)

Justification

The Mediterranean Basin is considered to be very vulnerable to global change impacts (including urbanization, climatic, environmental, socio-economic and land-use changes) because its ecosystems are threatened by drastic and rapid changes and complex interactions among multiple drivers. Global change is putting at stake important forest goods and services: wood and non-wood production; biodiversity, including genetic resources; water resources; and carbon budget. However, different parts of the Mediterranean Basin are impacted by different and contrasting processes depending on their socioeconomic situation and demographic trends. For example, forest degradation, overgrazing and intense use of available forest resources is a dominant trend in the southern Mediterranean regions, whereas in the north, forestry activities are being abandoned and natural forestation is increasing, at least in the uplands. In this context, determining the expected impact of global change on forest ecosystems and the goods and services they provide in different parts of the Mediterranean Basin poses an enormous challenge. Such information is crucial for developing adaptive strategies, from forest management to forest policy level, to ensure that Mediterranean forests will continue to deliver relevant services. This is particularly important in hot spots, where the impact of global change drivers is predicted to be particularly large, and complex interactions among drivers lead to situations in which different policies may have conflicting effects on different ecosystem services. Long-term monitoring through a large observational network is essential to gather the information needed to orientate proper management. It is crucial to promote the institutional changes needed to face the above-mentioned challenges.

Scope

This project requires a pan-Mediterranean regional scale, a truly multidisciplinary approach (climatology, ecophysiology, demography, geography, ecology, fire research, modelling, economics, governance, etc), and different scientific tools, including remote sensing, long-term monitoring networks, socio-economic data, integrated modelling.

Objectives

- (i) to understand, analyse and map the main global change drivers, impacts (including main risks and abiotic risks) and indicators relevant for the sustainability of forest ecosystems and their goods and services at the Mediterranean Basin scale;
- (ii) to forecast future impacts and vulnerability of forest ecosystems and their goods and services at local and Mediterranean scale based on increased understanding of
 - climate: the need for downscaling and improvement of climate models
 - main biotic and abiotic forest disturbances
 - human demography, socioeconomic development, social values and perception (e.g., urbanize society) as well as land-use trends
 - biological/ecological traits and adaptive capacity of species and genotypes
 - forest distribution (shift in species, the role of invasive species, species migration vs. adaptation)
 - dynamical tendencies in the community and related structural and compositional changes
- (iii) to identify main risks and hotspot areas requiring special attention at Mediterranean scale, including forest fire risk;
- (iv) to identify the most sensitive and vulnerable types of forest community in the Mediterranean area.
- (v) to develop an integrated Mediterranean level forest information system (including interactive data-bases, mapping tools, etc.) as basis for developing new adaptive strategies and policies, and

identifying needed changes in management policies and restoration needs for minimizing impacts of global change on forest ecosystems in the Mediterranean Basin.

Expected Impact

A Mediterranean-scale integrated understanding of DPSIR (Driving Forces-Pressures-State-Impacts-Responses) to global change as a basis for developing new strategies, policies and governance models to enhance the sustainability of forest ecosystem services, from cross-sectoral policies to integrated land management. This will also contribute to the FAO initiative on drylands restoration (<http://www.fao.org/forestry/aridzone/77777/en/>) and the state of Mediterranean forests.

4.2. Fostering forest system resilience through managing biodiversity, from genes to communities (Biodiversity)

Justification

The Mediterranean area is a biodiversity hotspot with a history of diverse land use and management practices. Bio-diverse ecological systems are expected to be more resilient to disturbance than simplified ones. However, little is known about the functional response and evolution of this diversity in Mediterranean forests confronted with rapid social and environmental changes. Basic research on functional and evolutionary processes in the context of a fluctuating and changing environment, in particular for trees as long-lived sessile organisms and keystone species of the forest ecosystem, is greatly needed. Similarly, the socio-economic drivers and their impact on biodiversity in Mediterranean forests need better understanding. Integrating knowledge about these processes and forest management is required to forecast future scenarios and evaluate impacts on Mediterranean forest ecosystem services. Finally, there is a need to integrate this knowledge further with policy and economics in order to develop a comprehensive and dynamic socio-ecological approach to the resilience of Mediterranean forests in a global-change context, considering various temporal and spatial scales.

Scope

An interdisciplinary effort is required, combining expertise in environmental sciences, ecology, genetics and population biology, forest management, governance and economics. The approach will combine experimentation (in situ measurements and controlled experiments) and modelling efforts, to elucidate the role of biodiversity at different levels (from genes to communities) in fostering forest resilience and preserving ecological functioning and ecosystem services. A thorough understanding of the impact of forest management to foster the adaptive capacity of Mediterranean forest as well as policy and economic instruments to finance and promote adaptive forest management models that enhance the functional and evolutionary potential of Mediterranean forests is required.

Objectives

- (i) to advance knowledge, on different temporal and spatial scales, on the functional, structural and evolutionary response of Mediterranean forests as affected by environmental (including the intensification of forest disturbances, especially forest fires), land-use and socio-economic changes;
- (ii) to develop new adaptive forest management models and tools that take into account the role and dynamics of forest biodiversity (from genes to forest communities, including their associate myco - and vascular flora) at local and landscape levels;
- (iii) to contribute to the development of economic valuation, financing mechanisms and appropriate policy frameworks that will support the conservation of biodiversity resources and the implementation of adaptive forest management.

Expected impact

To improve understanding and technological know-how in fostering functional and evolutionary processes that affect adaptability and resilience of Mediterranean forests through new silvicultural practices and landscape management. Mechanisms to integrate biodiversity in economic evaluations and governance decisions will contribute to the effective preservation of biodiversity hotspots, such as Mediterranean forests, and will safeguard their ecosystem services for future generations.

4.3. Multi-purpose forest landscapes management to enhance the role of non-wood products and related ecosystem services in rural development (Multipurpose landscapes)

Justification

Forests, silvo-pastoral and agroforestry systems in the Mediterranean region are not only important because of their high ecological value, but also due to their contribution to human welfare in the region. Although their wood production capacity is relatively limited when compared to forests in other European regions, they are highly appreciated for the provision of non-wood forest products and services. Non-wood forest products (NWFP), such as cork, fodder, mushrooms, fruits, pharmaceutical and aromatic plants, can contribute significantly to local or national economies and to rural development. For example, in the southern Mediterranean area, it is estimated that grazing provides almost three times as much benefit, per hectare, as wood forest products. Another example is cork, which in Portugal accounts for 35% of the estimated total benefits obtained from forests. Furthermore, the importance of these non-wood goods has often resulted in the development of Mediterranean-specific agro-forest systems, where different uses are combined to improve the limited production potential of the ecosystems.

However, present social, environmental and economic developments are creating new challenges for land managers in terms of how to optimise the production of different non-wood products, without jeopardising the ecological stability of the ecosystems. In this respect, new management approaches, innovation systems and policy frameworks are required in order to improve production potential in a sustainable way and also better to commoditize and market the relevant NWFPs and ecosystem services.

Scope

It is expected that the project will take a broad, interdisciplinary approach, combining research in the fields of forest management and planning, landscape ecology, range management and animal production, innovation, marketing, and institutional aspects. Such an integrated approach should guarantee that all aspects of the Mediterranean forest and agro-silvo production systems are considered when developing innovative solutions that will help to optimise the benefits these systems provide to societies, and in particular to rural communities.

Objectives

Specific objectives of the call are:

- (i) to generate new knowledge on the production potential and trade-offs of specific Mediterranean forest-based ecosystems, regarding wood and relevant non-wood forest products and ecosystem services;
- (ii) to generate new knowledge and tools to understand and optimise forest management (including the use of prescribed burning) regarding the joint production of wood and NWFPs from multi-purpose landscapes, and taking into account biodiversity conservation objectives;
- (iii) to provide wider understanding of the potential markets for non-wood forest products (including grazing potential and eco-tourism related to NWFPs), including the role of public and private actors in supporting the innovation processes for new products based on consumers' preferences;
- (iv) to understand better the structure, relationships and preferences of different stakeholder groups (including differences from southern and northern regions), and to develop approaches to include stakeholder preferences in the forest management planning process, estimation of trade-offs and facilitation of potential conflict resolution amongst stakeholders;

- (v) to analyse the capacity for institutions (e.g., policies, regulations, policy instruments, property rights, cultural norms and traditions) to enhance the role of NWFPs in rural development (considering differences in the north and the south) and to analyse and enhance the market value chains of non wood products. Also to analyse product diversification as an adaptation strategy to the environmental and socio-economic context.

Expected impact

The project will help to define strategies for the production and commoditization of NWFPs. The project will be instrumental in diversifying traditional land management activities and fostering competitiveness and innovative socio-economic activities in rural communities in the Mediterranean region. Furthermore, it will generate new multipurpose forest and landscape management to improve the production potential of Mediterranean forest ecosystems regarding NWFPs. Finally, it will result in new ways for stimulating cooperation between forest owners as well as new financing mechanisms to increase forestry investments regarding NWFPs.

4.4. Integrated watershed management for delivering forest water-related services (Water)

Justification

In a Mediterranean context, water is a high-value strategic resource. Due to climate change, demographic pressure and related land use changes, quality water is becoming increasingly scarce and is already a potential source of conflict. Forests can play an important role in the regulation of Mediterranean water resources. Understanding forest-water interactions on different scales is a prerequisite for sustainable and equitable management of water resources, and as such for developing adequate tools and policies to enhance water-related ecosystem services. Despite this, water and forest management policies, strategies and plans are generally developed and implemented by sector, without considering the interrelated implications between these two resources. The time has come to design new management strategies, along with tools and policies to support decision making, that effectively integrate knowledge from different scales and disciplines to ensure that forest management and planning takes into account impacts on the water cycle.

Scope

The project will generate new cross-disciplinary, multi-scale research aiming at developing new knowledge for a socio-eco-hydrological approach to forest-related water resources management. Building blocks from meteorology, hydrology, silviculture, forest operational science, economics, and governance will be integrated into a multi-scale approach from forest to landscape level, while additionally offering insights at pan-Mediterranean level.

Objectives

This call aims at the development of new management tools, economic incentives and governance models for optimizing water-related forest ecosystem services (green and blue water flows, water quality) and minimizing water-related risks (droughts, floods, pollution). This requires integrating knowledge on the hydrology of forest ecosystems and the modelling of scenarios on how changes in climate and land use alongside forest management affect water yield and quality.

Specific objectives of the call are:

- (i) to increase understanding of the trade-offs between water-related and other forest ecosystem services at different scales;
- (ii) to review and scale up the estimated effects of trees and forests on evapo-transpirative cooling, micro- and meso-climate, and rainfall;
- (iii) to design forest-to-basin level management models (including e.g. tree species choice, landscape composition and configuration) that contribute to drought adaptation, water harvesting, water productivity, and water quality;
- (iv) to improve understanding of economic instruments (Payment for Ecosystem Services – PES, and PES-like instruments) and policies;
- (v) to develop governance models that support fair access and sustainable use for forest water resources;
- (vi) to analyse the issue of water use in restoration and forestation projects and programmes in the Mediterranean.

Expected impact

This research will have an impact on the implementation of improved integrated management strategies that link forests-to-basin level decisions aimed at optimising the effects of forestry on the water cycle, while understanding the trade-offs with other ecosystem services. It will also promote the development of adequate economic instruments (water pricing and markets, PES-like instruments), governance models and legal frameworks to finance and promote the sustainable use of water-related forest ecosystem services in an equitable manner.

Annex 1. Programme of Strategic Workshop

- 09:00 **Welcome** by Hamed Daly, INRGREF, Habib Amamou, President IRESA and Marc Palahí, EFIMED
- 09:15 **5 years of EFIMED: towards a Mediterranean forest research area** by Marc Palahí , EFIMED
- 09:35 **Discussion**
- 09:45 **FORESTERRA ERA-NET** by Rocío Lansac, Ministry of Economy and Competitiveness of Spain
Moderator: Marco Marchetti, University of Molise, Italy
Discussion
- 10:40 **FORESTERRA strategic activities (WP3)** by Marc Palahi, EFIMED
Presentation from other Mediterranean Climate Areas
Chairman: Marc Palahi, EFIMED
Australia by Jerry Vanclay, Southern Cross University
California by Keith Gilles, University of California - College of Natural Resources of Berkeley
- 11:30 **Synthesis of the call for ideas and Introduction to FORESTERRA workshop on strategic activities** by Bart Muys, EFIMED
- 11:50 **FORESTERRA workshop:** parallel sessions organized by topics
- 14:20 **FORESTERRA workshop:** parallel sessions organized by topics
- 16:00 **Wrap up session**

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Annex 3. Pictures of Strategic Workshop



Photo 1. FORESTERRA workshop. Parallel sessions (Abigail García)



Photo 2. FORESTERRA workshop (Abigail García)

Annex 4. Programme of Steering Committee and Stakeholders Advisory Group

Day 1 - 18th of October

Venue: *Unità di ricerca per la climatologia e la meteorologia applicate all'agricoltura (CRA-CMA), Via del Caravita 7^a, Rome*

Session 1: Opening & Progress of the WPs

(Chair: Serenella Puliga, MIPAAF)

09.00 – 09.05	Welcome & opening remarks (Luigi Perini, CRA)
09:05 – 09:15	Coordinator's welcome & meeting objectives (Rocío Lansac, MINECO)
09.15 – 09.45	Mapping research activities: analysis and discussion of WP2 questionnaires and thinking ahead to Task 3.1, Definition of joint activities (Giuseppe Scarascia, CRA)
09.45 – 10.30	Progress of the other WPs <ul style="list-style-type: none">• WP4 progress and outlook (Jean-Charles Valette, INRA)• WP6 progress and outlook (Joana Pinheiro, FCT)• WP7 progress and outlook (Dunixi Gabiña, IAMZ)
11.00 – 13.00	Mapping research activities and thinking ahead: Poster Session (Giovanni Di Matteo & Sofia Bajocco, CRA)

Session 2: Introduction of SAG members & Strategic Activities (WP3)

(Chair: Rocío Lansac, MINECO)

14.00 – 14.30	Brief self-introductions by the Stakeholders Advisory Group members
14.30 – 15.30	Presentation of FORESTERRA strategic themes (Robert Mavsar, EFIMED)
15.30 – 16.00	Presentation of JPI "Water challenges for a changing world": objectives, strategy and possible synergies (Enrique Playán, MINECO)
16.30 – 18.00	General discussion of FORESTERRA strategic themes and of possible relationships with other ERA-NETs and JPIs (Robert Mavsar, EFIMED)

Day 2 - 19th of October

Venue: Castelporziano Presidential Estate and Natural Reserve

09.15 – 09.30 Introduction to the Castelporziano Forest (Ervedo Giordano, Scientific Committee of Castelporziano Reserve)

Session 3: Steering Committee

In parallel: Stakeholders Advisory Group meeting (Chair: Yves Birot)

(Chair: Rocío Lansac, MINECO)

09.30 – 10.00 WP1 administrative issues. Internal report (Victoria Sanz, EFIMED)

10.00 – 10.45 Steering Committee wrap up and summary (Robert Mavsar, EFIMED)

10.45 – 11.00 Way forward (next meeting date and next steps) (Rocío Lansac, MINECO)

Session 4: SAG feedback and closing

(Chair: Giuseppe Scarascia, CRA)

11.00 – 11.30 Feedback from the SAG. Conclusion of the meeting (Yves Birot, SAG)

11.30 – 13.30 In-field discussion of management and conservation of Mediterranean coastal forests: the case of the Castelporziano Natural Reserve (Giorgio Calzolari & Aleandro Tinelli, Presidenza della Repubblica)

Annex 5. Participants of Steering Committee and Stakeholders Advisory Group

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