



MEMORANDUM OF
COOPERATION AND SUPPORT
TO ACHIEVE GOALS OF ACTION
PLAN “WOOD IS BEAUTIFUL”

MEMORANDUM O
SODELOVANJU IN PODPORI PRI
URESNIČEVANJUJ CILJEV
AKCIJSKEGA
NAČRTA “LES JE LEP”

MAY 22ND, 2018

22. MAJ 2018

Hereby acting in joint effort and support of the investment in the BSW.SI wood processing investment.

Deležniki in podporniki investicije BSW.SI v lesno predelovalno dejavnost v Sloveniji.

Gospodarska zbornica Slovenije

Dimičeva ulica 13

1000 Ljubljana

Signature/podpis:

Boštjan Gorjup, predsednik GZS _____ Datum: 22. 5. 2018

Zveza lastnikov gozdov Slovenije

Slovenska pot 5

8320 Šentrupert

Signature/podpis:

Marjan Hren, predsednik _____ Datum: 22. 5. 2018

Petrol energetska družba d.d.

Dunajska cesta 50

1000 Ljubljana

Signature/podpis:

Rok Vodnik, član uprave _____ Datum: 22. 5. 2018

BSW Timber ltd

East end

TD4 6JA

Earlston

United Kingdom

Signature/podpis:

Tony Hackney, CEO _____ Datum: 22. 5. 2018

BSW.SI d.o.o.

Šmatevž 26,

3303 Gomilsko

Signature/podpis:

Alex Brownlie, director _____ Datum: 22. 5. 2018

The above mentioned parties jointly acknowledge that the government of Republic of Slovenia adopted an action plan "Wood is Beautiful" in June 2012 as an initial framework to support and promote the Slovenian wood processing industry with the following goals:

- Creation of market for wood, wood products and services.
- Increase in forest felling and care, according to the forest management plans.
- Increasing the quantity and processing of timber on the higher difficulty levels, with new technologies.
- New jobs and growth in value added per employee in the wood processing industry.

Zgornji deležniki ugotavljajo, da je vlada Republike Slovenije junija 2012 sprejela akcijski načrt "Les je lep" kot osnovni strateški dokument za promocijo in podporo slovenski lesno predelovalni panogi z naslednjimi cilji:

- **Vzpostavitev učinkovitega trga za les, lesne proizvode in storitve.**
- **Povečanje obsega sečnje in izboljšanje upravljanja z gozdom skladno z načrti.**
- **Povečanje količine doma predelane hlodovine na zahtevnejših nivojih in z novimi tehnologijami.**
- **Ustvarjanje novih delovnih mest in povečevanje dodane vrednosti na zaposlenega v lesno predelovalni panogi.**

Slovenia is the third most forested country of the EU (after Finland and Sweden) and has an increment of about 9 million m³ of timber annually. Due to irregular and even interrupted forest-timber processing chain Slovenian wood is not utilized sufficiently resulting in the Slovenian wood being exported, while the domestic wood processing industry collapsed. Examples of good practices suggest that in an appropriate value chain a value of one cubic meter (m³) of timber could multiply 100-fold from forest to finished wood products sold, such as wooden house or even more if the wood is used for high-tech products. In the well-managed forest products sector every 100 m³ of processed wood accounts for one new job.

With current felling levels still lagging the optimal and possible, the Slovenian woods are struggling to keep the excellent quality and health for which they are renowned.

Slovenija je po gozdnatosti tretja država v EU in ima letni prirastek okoli 9 milijonov m³ hlodovine. Zaradi neoptimalnega upravljanja z gozdom in prekinjeno gozdno – lesno verigo se slovenski les ne izkorišča optimalno, izvažajo se kot hlodovina, medtem ko je propadla domača lesno predelovalna industrija. Primeri dobre prakse kažejo, da se v ustrezni vrednosti verigi lahko vrednost 1m³ hlodovine v končnem produktu lahko postotni (npr. v montažnih hišah ali visokotehnoloških produktih).

V dobro upravljeni gozdno lesni verigi vsakih 100 m³ predelanega lesa pomeni eno delovno mesto.

Zaradi padajočega obsega sečnje, ki zaostaja za možnim in optimalnim obsegom, je vedno težje ohranjati odlično kakovost in zdravje, po čemer so slovenski gozdovi poznani.

Vision: Forest management is implemented in a sustainable manner, taking into account and ensuring all its functions. Wood is recognized as a vital strategic raw material in Slovenia, forestry and wood processing sector are a vital part of the economy and industry in Slovenia.

Overarching objective 1: Create a market for forest products.

Overarching objective 2: Increase in timber felling to at least 6.5 million m³ (gross) in 2020.

Overarching objective 3: Increasing the amount of domestically processed round wood from 1.7 million m³ (net) in 2010 to 3.3 million m³ in 2020.

Overarching objective 4: Value added per employee in the wood processing industry in 2020 achieves a comparable industry-level in the EU 27.

Vizija: Sonaravno upravljanje z gozdom v Sloveniji upošteva vse dejavnike v gozdu in zagotavlja delovanje vseh funkcij in živih bitij v njem. Za Slovenijo je les prepoznan kot strateško pomembna surovina, s tem pa sta strateška tudi upravljanje z gozdom in gozdno – lesna veriga.

Cilj 1: vzpostavitev trga za gozdne proizvode.

Cilj 2: povečanje poseka na vsaj 6,5 milijonov m³ bruto v letu 2020.

Cilj 3: povečanje obsega doma predelane hlodovine iz 1,7 milijona m³ neto na 3.3 milijona m³ do leta 2020.

Cilj 4: doseganje primerljive dodane vrednosti na zaposlenega v panogi z EU 27.

The government has as one of the supporting steps to realizing of the action plan “wood is beautiful” in March 2016, established a centralized forestry company SIDG – Slovenian State Forests with the purpose to consolidate the forestry function for state owned forests and at the same time offering the service also to the private forest owners. This step directly supports the goal of increased felling and centralized forest management as well as gives the option to increase the share of domestic production and value added creation.

Vlada Republike Slovenije je kot enega pomembnejših korakov uresničitvi akcijskega načrta “Les je lep” marca 2016 ustanovila podjetje Slovenski državi gozdovi – SIDG, z namenom konsolidacije upravljanja z državnimi gozdovi ter možnostjo izvajanja potrebnih storitev tudi v zasebnih gozdovih. Ta korak neposredno podpira cilj povečane sečnje in upravljanja ter daje možnost povečanja deleža domače proizvodnje in ustvarjanja dodane vrednosti.

Under operational goals the action plan “Wood is beautiful” states the following:

- 3 big saw mills for coniferous timber in capacity from 300-500 Km³.
- 5 smaller facilities (50-100K m³) for deciduous timber.
- Increase of timber cut from actual 4 mil. m³ to 6,5 mil. m³ in 2020.

- Creating of market for (additional) processed wood by public orders for new buildings (already in power – subsidies for wooden windows, doors, etc.), also insulation of older houses in public use
- Heating by biomass use.
- Power creation by biomass use.
- Further potential for wood products in infrastructure (highway sound barriers, riverbanks, traffic,...).

The signing parties hereby note that they are active in the forest products business and use wood as part of their business activities on a daily basis.

Kot opreativne cilje akcijski načrt "Les je lep" navaja naslednje:

- ***3 velike žage za iglavce s kapaciteto 300 – 500 km³.***
- ***5 manjših žag 50 – 100K m³ za listavce.***
- ***Povečanje poseka iz sedanjih 4 mil. m³ na 6,5 mil. m³ v letu 2020.***
- ***Ustvarjanje trga za predelan les v okviru Sistema javnih naročil za stavbe (že v praksi za energijo – subvencije za lesena okna, vrata ...) kot tudi za izolacijo starejših stavb v javni lasti***
- ***Proizvodnja toplotne energije iz biomase.***
- ***Dodatni potencial za les v infrastrukturi (protihrupne ograje, nabrežja, promet ...).***

Podpisniki tega memoranduma ugotavljajo, da so že posredni ali neposredni udeleženci v gozdno – lesni verigi kot proizvajalci, ponudniki storitev ali članstva v njihovih družbah in/ali organizacijah ali uporabljajo les v vsakodnevni dejavnosti.

The Chamber of Commerce and Industry of Slovenia (CCIS) provides essential services for enterprises operating in Slovenia, and it is the ideal local partner for foreign investors. The CCIS was founded more than 160 years ago and now has 7,000 member companies of all sizes and from all regions. It is a non-profit, non-governmental, independent business organization representing the interest of its members and is Slovenia's most influential business association. CCIS unites under its roof 24 industry associations and 13 regional chambers, representing all sectors of Slovenian Economy.

CCIS is member of the Economic and Social Council in Slovenia. It has the status of a representative Chamber of Commerce and is thus partner for the government in preparing legislation and policy strategies. It is member in numerous government bodies, boards and committees, supporting them with know-how and expertise. CCIS a social partner organization and signatory party of more than 20 branch collective agreements.

Gospodarska zbornica Slovenije (GZS) zagotavlja osnovne storitve podjetjem, ki delujejo v Sloveniji in je idealen lokalni partner za tuje investitorje. GZS je bila ustanovljena pred več kot 160 leti in ima zdaj 7.000 družb članic vseh velikosti in iz vseh regij. Je neprofitna, nevladna, neodvisna poslovna organizacija, ki zastopa interese svojih članov in je najmočnejša poslovna zveza Slovenije. GZS združuje 24 združenj oziroma branžnih zbornic in 13 območnih oziroma regionalnih zbornic. ki zastopajo vse sektorje slovenskega gospodarstva.

GZS je članica Ekonomsko-socialnega sveta v Sloveniji. Ima status reprezentativne gospodarske zbornice in je tako partner za vlado pri pripravi zakonodaje in političnih strategij. Je članica številnih

državnih organov in odborov, ki jih podpira s strokovnim znanjem in izkušnjami. GZS je organizacija socialnih partnerjev in podpisnica več kot 20 kolektivnih pogodb v panogi.

The Forest Owners Association of Slovenia (ZLGS) was founded in 2006 and it represents 29 local forest owners' societies and about 4,000 forest owners. The association is important in promoting proper forestry among the private individuals and also presents an important partner in off-take agreements of logs and also of sawn timber. With members of association being close to the planned sawmill site in Gomilsko the potential in excess of 200,000 m³ and even more when acting through brokers. With the desire for achieving a competitive price with stable payments and long-term relationship the association is looking to be a reliable partner in projects.

Združenje lastnikov gozdov Slovenije (ZLGS) je bilo ustanovljeno leta 2006 in predstavlja 29 lokalnih društev lastnikov gozdov ter okoli 4.000 lastnikov gozdov. Združenje je pomembno pri spodbujanju ustreznega gospodarjenja z gozdovi med posamezniki in predstavlja tudi pomembnega partnerja pri sporazumih pri odkupu hlodovine in žaganega lesa. Člani združenja je blizu lokacije načrtovane žage v Gomilskem imajo dobavni potencial, ki presega 200.000 m³ letno, in še več s poslovanjem preko posrednikov. Z željo po doseganju konkurenčne cene s stabilnimi plačili in dolgoročnim odnosom se združenja zdi pomemben in zanesljiv partner v projektih.

Petrol is the leading energy provider in Slovenia and also growing in sector of wood remains based products for heating, which became its strategic future development goal and is already actively present in the wood processing industry. In addition to that Petrol has recently established itself as a leading energy solutions providers also in efficient use of energy and refurbishment of buildings with energy optimization. Within this Petrol is looking for options to increase the use of wood and wood pre-fabricated facade panels. With large distribution network in Slovenia and in CEE region Petrol can establish itself also in the area of distribution of biomass heating products.

Petrol je vodilni ponudnik energetske storitve v Sloveniji in raste tudi na področju energetske rabe lesa, ki je postala njen strateški razvojni cilj in je že aktivno prisoten v lesnopredelovalni industriji. Poleg tega se je Petrol pred kratkim uveljavil kot vodilni ponudnik energetske rešitve tudi pri učinkoviti rabi energije in energetske prenove stavb. V okviru tega iščejo možnosti za povečanje uporabe lesa in predfabriciranih fasadnih oblog. Z veliko distribucijsko mrežo v Sloveniji in na območju Srednje in Vzhodne Evrope se lahko Petrol uveljavi tudi na področju distribucije izdelkov za ogrevanje na biomaso.

BSW Timber Limited are a company with almost 170 years history in private ownership and are the largest UK sawmilling group. With revenues of 300 million GBP and presence in 8 locations the group employs more than 1300 people. The scale and also product range has enabled the Group to establish itself as a global player and as such rightly positioned to invest in Slovenia to develop its wood industry to operate as a global force.

In addition, BSW industry knowledge and expertise in sawmilling, value added products, forestry management and harvesting, especially since the latest acquisition of **Tilhill** gives the Group the unique opportunity to develop a strategic partnership with Government, SIDG d.o.o. and other players in the

wood processing chain from forestry and forest management to products with high value added as well as other indigenous sawmillers to help enhance their performance.

BSW has a stated objective to work with other Slovenian sawmill companies through trade and cooperation to support and add value to Slovenian saw products from other mills as well as its own.

Furthermore, BSW has an objective to increase the % of added value sawn timber produced in Slovenia and taken to global markets that BSW currently supplies from its other mills. It is understood by BSW that this increased added value volume will be sourced from its own sawmill planned here in Slovenia and by partner trading with other domestic sawmills in Slovenia.

Through its planned sawmill investment in Slovenia, BSW aims to create a "cluster" effect of other value adding businesses developing within Slovenia that BSW will be able to support through secure supply of quality timber product produced at the BSW planned mill.

Finally, BSW wishes to develop a forestry and timber sourcing arm with local Slovenian management and know-how to establish greater management services, timber marketing and harvesting support for the Slovenian private forest owners.

Podjetje BSW Timber Limited je podjetje v zasebni lasti s skoraj 170-letno zgodovino in je največja britanska lesna skupina. S prihodki v višini 300 milijonov GBP in prisotnostjo na osmih proizvodnih lokacijah skupina zaposluje več kot 1300 ljudi. Obseg in tudi paleta izdelkov sta Skupini omogočila, da se uveljavi kot globalni igralec in se kot tak upravičeno pozicionira, vlaga v Slovenijo in razvija lesno industrijo ter deluje kot globalna igralec.

Industrijske izkušnje in strokovno znanje BSW v žagarstvu, nadaljnji predelavi, upravljanju gozdov, sečnji in spravilu, še posebej po zadnjem prevzemu podjetja Tilhill, dajejo skupini edinstveno priložnost za razvoj strateškega partnerstva z vlado, SIDG in drugimi subjekti v gozdno lesni verigi od gozdarstva do izdelkov z visoko dodano vrednostjo ter pomoč domačim žagarjem pri tehnoloških spremembah in povečanju njihove učinkovitosti ter tudi pri plasmaju polizdelkov in izdelkov preko lastnih, široko razvejanih prodajnih kanalov.

BSW bo tako sodeloval z drugimi slovenskimi žagami in lesno-predelovalnimi podjetji za konkretno povečanje dodane vrednosti slovenskemu lesu.

BSW namerava dodati svoji ponudbi lesa in lesenih polizdelkov na svetovnem trgu tudi proizvode iz načrtovanih lastnih kapacitet tudi proizvode zainteresiranih drugih slovenskih žag, ki bi želele vstopiti v partnerski odnos z BSW.

Z nameravano proizvodnjo žagi v Sloveniji si BSW prizadeva ustvariti učinek "grozda" drugih podjetij z dodano vrednostjo, ki se razvijajo v Sloveniji, da bo BSW lahko podpiral z varno dobavo kakovostnega lesa, proizvedenega na načrtovanem obratu BSW.

Ne nazadnje, BSW želi razviti gozdarstvo in pridobivanje lesa s pomočjo lokalnega slovenskega upravljanja in znanja za vzpostavitev širših upravljavskih storitev, trženja lesa in podpore sečnji za slovenske zasebne lastnike gozdov.

Forests, wood and its incorporation in decreasing of CO2 emissions are a strategic priority for Slovenia. With this memorandum the parties intend to:

- 1. Support aspirations for sustainable forestry that will enable the forests to be used also by future generations.**
- 2. Encourage the felling in the right time and improve organisation of wood market also from the private forests.**
- 3. Establish conditions that will encourage investments in the wood chain.**
- 4. Encourage foreign investors to invest in Slovenia thus enabling the value added to remain in Slovenia.**
- 5. Encourage and support construction by using wood also through Green public tenders.**
- 6. Support the research and development of SRIP "smart buildings" within the wood chain in order to build smart wooden housing.**
- 7. Support activities that will lead to export of wood products with higher value added.**
- 8. Promote to political parties, companies and the general public that wood is a strategic advantage of Slovenia and that it shall be used with the vision "Slovenia = Green Active and Healthy.**
- 9. Encourage the private sector forest owners to improve the utilisation of their forest holdings across Slovenia.**
- 10. Support further Research and Development into the forestry and forest products sector of Slovenia.**
- 11. Support training, education and skills development to encourage young people to become involved in the forest products sector of Slovenia.**
- 12. Support cluster activities in the wood related industries to further support the principal of value adding to remain in Slovenia.**

The parties hereby confirm that they will support each other in their aspirations in investments in wood processing industry with the aim to reach the goals set forth in government action plan "Wood is beautiful". The parties also note and that the aspirations shall be supported by local and national government especially taking into account sometimes lengthy and complex processes of executing investments in rural areas.

Gozdovi, les in njegova vključitev v zmanjšanje emisij CO2 sta strateška prednostna naloga Slovenije. S tem memorandumom stranke nameravajo:

- 1. Podpirati težnje k trajnostnemu gospodarjenju z gozdom, da gozdove lahko uporabljale tudi prihodnje generacije.***
- 2. Spodbujati spravilo lesa v optimalnem času in izboljšati organizacijo lesnega trga tudi iz zasebnih gozdov.***
- 3. Vzpostaviti pogoje, ki bodo spodbujali naložbe v lesno verigo.***
- 4. Spodbujati tuje vlagatelje, da vlagajo v Slovenijo, s čimer bo dodana vrednost ostala v Sloveniji.***
- 5. Spodbujati in podpirati gradnjo z uporabo lesa prek zelenih javnih razpisov.***
- 6. Podpirati raziskave in razvoj "pametnih zgradb" SRIP znotraj lesne verige, da bi zgradili pametne lesene hiše.***

7. *Podpirati dejavnosti, ki bodo privedle do izvoza lesnih izdelkov z višjo dodano vrednostjo.*
8. *Osveščati politične stranke, podjetja in širšo javnost, da je les strateška prednost Slovenije in bo uporabljen z vizijo "Slovenija = zelena, aktivna in zdrava".*
9. *Spodbujati zasebne lastnike gozdov, da izboljšajo izkoriščanje svojih gozdnih posesti po vsej Sloveniji.*
10. *Podpirati nadaljnje raziskave in razvoj v sektorju gozdarstva in gozdarskih izdelkov v Sloveniji.*
11. *Podpora usposabljanju, izobraževanju in razvijanju spretnosti, da bi mlade spodbudili, da se vključijo v gozdarsko-lesni sektor Slovenije.*
12. *Podpirati dejavnosti gozdov v industriji, povezanih z lesom, da bi še naprej podpirali ustvarjanje dodane vrednosti, ki bi ostala v Sloveniji.*

Stranke podpisnice tega memoranduma potrjujejo, da se bodo medsebojno podpirale v svojih prizadevanjih za naložbe v lesno predelovalno industrijo, da bi dosegli cilje iz akcijskega načrta "Les je lep". Stranke verjamejo, da bodo ta prizadevanja podprta tudi s strani lokalnih skupnosti in oblasti kot tudi s strani nacionalne vlade, zlasti glede upoštevanja včasih zapletenih in dolgotrajnih procesov izvajanja naložb na podeželskih območjih.