



COST ACTION E48
The Limits of Paper Recycling

E48 Steering Group meeting

13 April 2007

Meeting venue: Royal Dutch Papermakers Association, VNP
Kruisweg 761
Hoofddorp, Amsterdam

Participants

Jan-Erik Levlin	JEL	Finland
Harald Grossmann	HG	Germany
Angeles Blanco	AB	Spain
Francois Julien-Saint-Armand	FJSA	France
Arie Hooimeijer	AH	Netherlands
Bartek Stawicki	BS	Netherlands

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At 8:00 hours JEL welcomes the participants with the introduction to the agenda. Discussion on the agenda points is carried out and the proposal of the meeting order by JEL was accepted by participants.

1. Impressions from the recent DC FPS meeting in Brussels (JEL)

JEL presented his impressions from the DC FPS meeting in Brussels: it had been a most interesting occasion to see how other Actions work.

Money problem brought up by Gunter – the issue is that still money is left to be spent. This gives the possibilities for the Action to take necessary activities and arrangements.

2. Situation concerning STSM applications (JEL)

The list of the STSM's carried/to be carried out within the framework of E48 has been presented. Common decision has been made to put the reports from STSM's on the Action's website. STSM's scientific reports need to be shorter and more attention needs to be paid to their scientific character. The on-going STSM's are to be carried out and reported before 08.06.2007.

3. Report on Task Force activities (HG, JEL)

The activities of the Task Force on the Paper and Board Recycling Competitiveness was reported BS. The target group of the questionnaire in order to evaluate the competitiveness of paper and board recycling was enlarged by more countries from EU (non E48 participants) and finally 19 countries did participate in the questionnaire in place of planned 17. Remaining work has been discussed. The first results and conclusions from the analyze will be presented in the Recycling Conference in Bilbao, 25-26.05.2007.

It was noted by JEL that the first meeting of the TF Statistics will take place in Brussels on 20.4.2007

4. Discussion of the mid-term Conference in Bilbao May 25-26, 2007

AB provided info on the general arrangements of the Bilbao Conference. Everything is under control.

The internal E48 meeting agenda has been presented by JEL. It will still be somewhat amended before the meeting.

The reimbursement rules for the combined meeting with the Action E46 have been discussed as the topic is not clear to the Action's participants. JEL stated action will be taken in order to clarify the issue with Gunter Siegel. The info will be disseminated by JEL within the E48 members.

There won't be WG meetings in Bilbao, however in Sofia – so that's an option to be used, in Sofia then the WGs will have to work on the scenarios.

5. Discussion of the autumn meeting in Sofia in October 2007 (JEL)

JEL gave preliminary information available from the organizers of the Sofia meeting. The general arrangements and agenda issues of the organization of 2007 autumn meeting in Sofia will be further discussed during the meeting in Bilbao.

6. Migration to the Grant System (JEL)

a. Election of Grant holder

The SG is to define the Grant holder who could take care of the Grant holding for E48. AH and AB proposed their respective organization to take care for the Grant. With a common decision of the Steering Group the Center of Competence Paper and Board (KCPK) in The Netherlands, the organization of AH has been accepted as the Grant holder. This decision will be confirmed at the MC meeting in Bilbao. Before the Bilbao meeting the formalization of the grant holder responsibility of KCPK will be prepared in order to move into the new financial system.

The deadline suggested by the SG for the implementation of the new financial system is the middle of 2007. This has still to be discussed with the COST secretariat.

b. Development of the detailed Work plan required for the application

The detailed Work plan will be worked out as part of the preparations of the application. JEL, AH

7. Initiating the scenario development work (HG)

HG referred to the Memorandum of Understanding, where the main aims and objectives of the Action are described and where creation of the scenarios as a most important part of these were explained.

The main idea of the scenarios was to give an idea to paper and board industry on the state of the art and the future development of paper and board products recycling (P&BR), and to provide an overview of the possible options of investments, identify basis of limits in P&BR and to be able to identify research needs in order to extend the limits.

For the industry it is crucial to know what the feasible development would be. It is known what've been collected, it has to be defined what kind of scenarios are to be developed. The boundary conditions need to be developed.

Procedure for the development of three different scenarios was suggested by HG and accepted. These should include a Base case based on estimates for the most probable development, and deviations from this in the form of a Worst case and a Best case, respectively. Factors influencing the development in either one of these directions should be identified and quantified, if possible. ***A first list of such factors, issues, will be developed by HG. HG, done in Bilbao***

It was agreed that the time scope for the scenarios should be 2020.

Above mentioned issues are to be covered within all the E48 Action activities.

A discussion on possible factors influencing the scenarios revealed the following:

FOLLOWING QUESTIONS need to be covered by the action's activities:

What would be the changes?

What will happen on the global scale?

What that means for the RP collectors, merchants, paper industry, consumers?

Which criteria need to be defined?

What are the max recovery rates in different regions and for different grades and what can be done to increase these?

How does the balance between different uses of recovered paper (paper production, energy) look like?

Is price really the most important factor for the collectors/is there space for quality as an important factor in RP collection?

AH shows the presentation of Ilpo Ervasti from Epe conference, on the world demand for paper and paperboard 1980-2020.

Suggestion was given to have the year 2020 as the deadline for the overall E48 activities target realization. AH agrees with the suggestion of HG concerning the target setting.

AH promised to send a CD with the presentations from the Epe meeting to all SG members. AH

The data/info presented could possibly be used as the basis for the definition of the criteria for the scenarios of the E48 action. The numbers of Poyry could be used as the basis for the base scenarios as they are the most reliable ones available.

Such countries as China and India need raw materials, recovered paper seems to be the solution in this case. However, per capita consumption is still at a low level in these countries, because of the population number there is a threat that the overall consumption can increase significantly.

ENVIRONMENTAL AWARENESS - was stated as one important point in the scenarios' development.

COLLECTION STRATEGIES – AH - E48 has not enough contact with the paper and board collection organizations, study on not only quantities but also on qualities of the materials collected.

The forecast for the collection rates based on the important factors that influence the collection needs to be prepared. The forecast should be based on society demands. It has

to be kept in mind what the influence could be and if the simplified collection of waste make the quality better?

Summary of the research carried out in The Netherlands on the quantities and qualities of recovered paper collected was mentioned. BS will provide further information. BS

ENERGY is to be a separate chapter in the scenarios

How far will legislations and recommendations influence our scenarios – this needs to be kept in mind as well.

A suggestion was given to invite a representative of the forest industry to give a presentation on the future destination/purposes of wood use.

Organizations such as EFI or ALTERRA could be of the interests as a lot of various studies have been performed by those towards wood applications.

The person could be invited to the next meeting of the Action (the person suggested by AH is Gert Jan Nabuurs from Wageningen University).

An agreement was made to invite the person AH will take care to take contact. AH

JEL will take contact with a representative of the Cost Action E31- Management of recovered wood and if feasible, invite him/her to one of the E48 future meetings. JEL

AB suggested creation of a database on the numbers which could be used for the action purposes.

What are the best applicable solutions for the use of recyclable cellulose fibres?

A strange thing is that municipal energy installation have to pay per cubic meter or per tone and not per caloric value. That is not right as more materials with higher value are available.

The basis of competition (in the means of applications) - panel board industry, bio-energy, competition in our own industry, and outside paper industry.

JEL it is necessary to define also the non papermaking purposes of use of the recycled fibres and the balance in terms of competitiveness between these..

The conclusion was that Ilpo's presentation could be used as one of the basis for the scenarios preparation even though the consumer is missing in the processing chain. Whilst consumer is a crucial part of recycling that has the most important influence on the Limits of P&BR.

LEGISLATION. In this context reference was made to a summary of legislation and directives prepared by Mr Farudin at CEPI. We should try to get availability to this. AH

MAIN CONCLUSIONS OF THE DISCUSSION ON SCENARIOS

- the presentation of Ilpo gives us some idea for the development of the base scenario

- HG will develop a table with different factors influencing the three scenarios (worst, base, best). This table would represent various criteria, ie as follows:
 - a. Consumption
 - b. Environmental awareness
 - c. Energy competition
 - d. Quality of RP
 - e. Collection efficiency
 - f. Paper demand in 2020 (new sources of info for young people, the use of internet as data base)
- HG will present the scenario development process at the internal E48 meeting in Bilbao and distribute tasks to the MC members
- A TF Scenarios should formally be established at the Bilbao meeting. This TF should consist of the SG members and Ilpo Ervasti. It should be prepared to meet relatively frequently. AB volunteered to tak the responsibility for writing the scenario report

The 2 months after the meeting time should be used to further develop the criteria.

AH suggested to have a STRATEGIC Workshop organized in Brussels during 2008, however a title for the workshop needs to be specified. AH, title?

FURTHER MEETINGS OF THE TF SCENARIOS

The next meeting is planned to be held in conjunction with the Bilbao conference, on Friday evening or Saturday morning.

HG will make a short presentation and will prepare the scenarios and criteria table, road map for these activities,

Sofia meeting in October could be used for the Task Force meeting in the afternoon of Wednesday October 24.

AH suggested following overall structure of the E48 Sofia meeting:

First day morning:

1. scenario development as the main issue for the discussion with invited speakers,
2. afternoon the discussion in the WGs groups,

Second day:

Conclusions and summary

Formal MC meeting

8. Other activities to be initiated (All)

Contacts with the suppliers of treatment technologies, Andritz, Voith, Meri, Eco designing etc is necessary in the scenarios evaluation.

Developments in printing and converting industry can be followed at the DRUPA. 11th June 2008 .

The results of the study carried out by KCPK in the framework of EFORWOOD could be presented at the next meeting. AH, details?

9. Discussion of the Actions' final report (HG, JEL)

The requirement of the Cost Office towards the final report is that, in addition to the formal Final report largely of an administrative nature we should have an executive, large summary covering all the information obtained, however a brochure for large distribution is also desirable.

a. Content and structure

The basic idea is to produce a book at the end of the Action. At the end of each of the WG and TF activities a report needs to be prepared and this will form the basic material for the book. The final report would be a by-product of the book. In 2009 we need a Task force to set up the book. This that would be the Steering committee (work will be distributed and divided)

b. How to organize the work

AH suggested that the 3 WGs will provide the materials for the final report. This would be the executive summary.

The full scientific report would be in the form of a book of the following structure:

1. Introduction
2. First part – provided by the work evaluated and performed within the WG
3. Main part – scenarios
4. Conclusions from the scenarios and final recommendations

JEL Executive summary – that would be an extended summary of the book.

10. Any other businesses

Meetings of the Action in 2008 has been preliminarily discussed. Following propositions for changes of the location of the meetings has been made by the Hungarian MC representative:

Spring 2008, Budapest Hungary, early May

Autumn 2008, Bukarest Romania

These were accepted by the SG

11. Closure of the meeting

At 16:00 hours JEL thanks to all the participants for their contribution and closes the meeting.

