



Challenges and opportunities of the wood construction sector – insights from the InnoRenew CoE market analysis

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Teaming Action



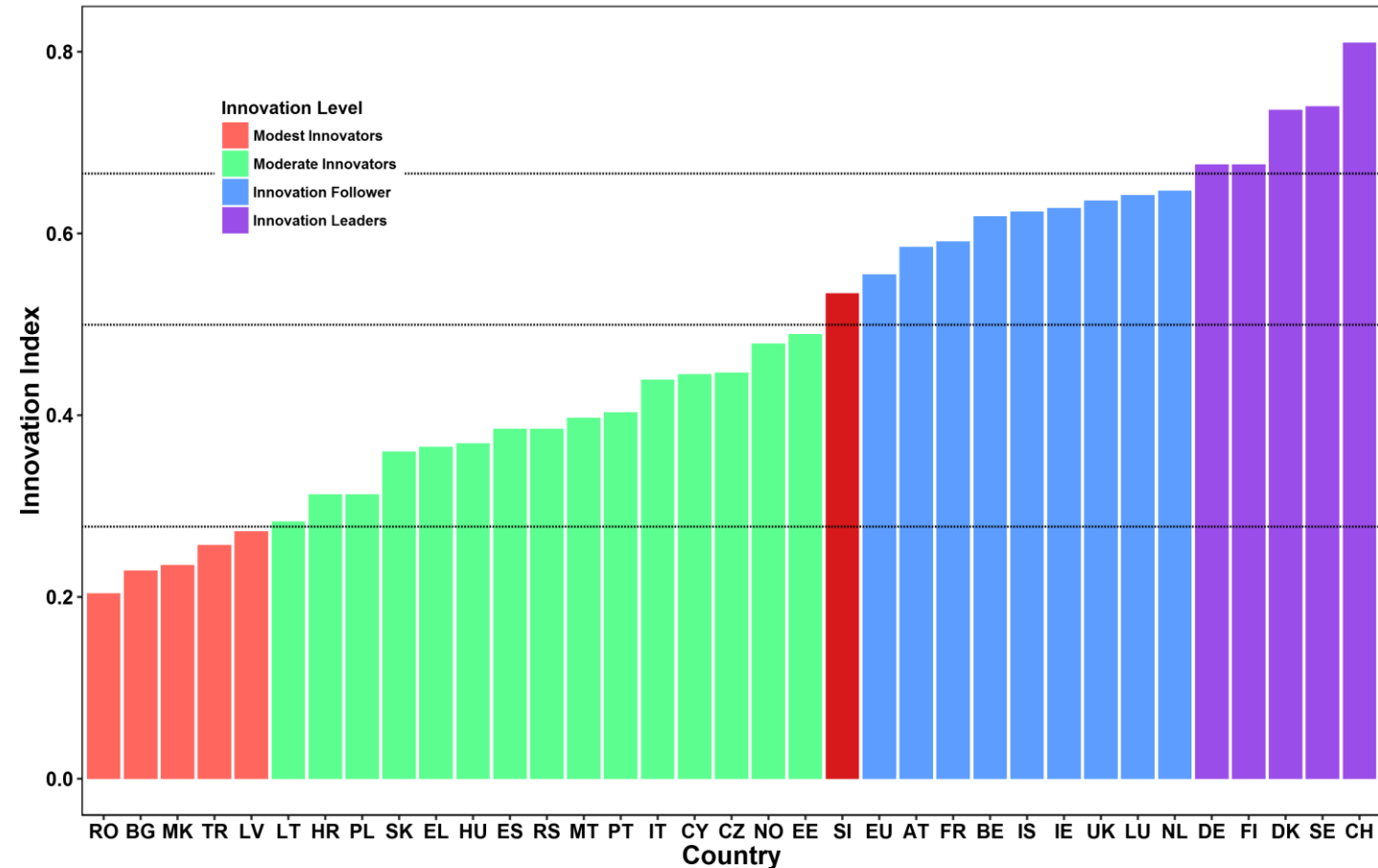
- EU RDI landscape has regional disparities:
 - Insufficient critical mass of centres in research and science
- Teaming will create/upgrade centres of excellence by forming partnerships between leading scientific institutions and low-performing partners.

EU Performance



■ Innovation Follower

EU Innovation Index Scoreboard



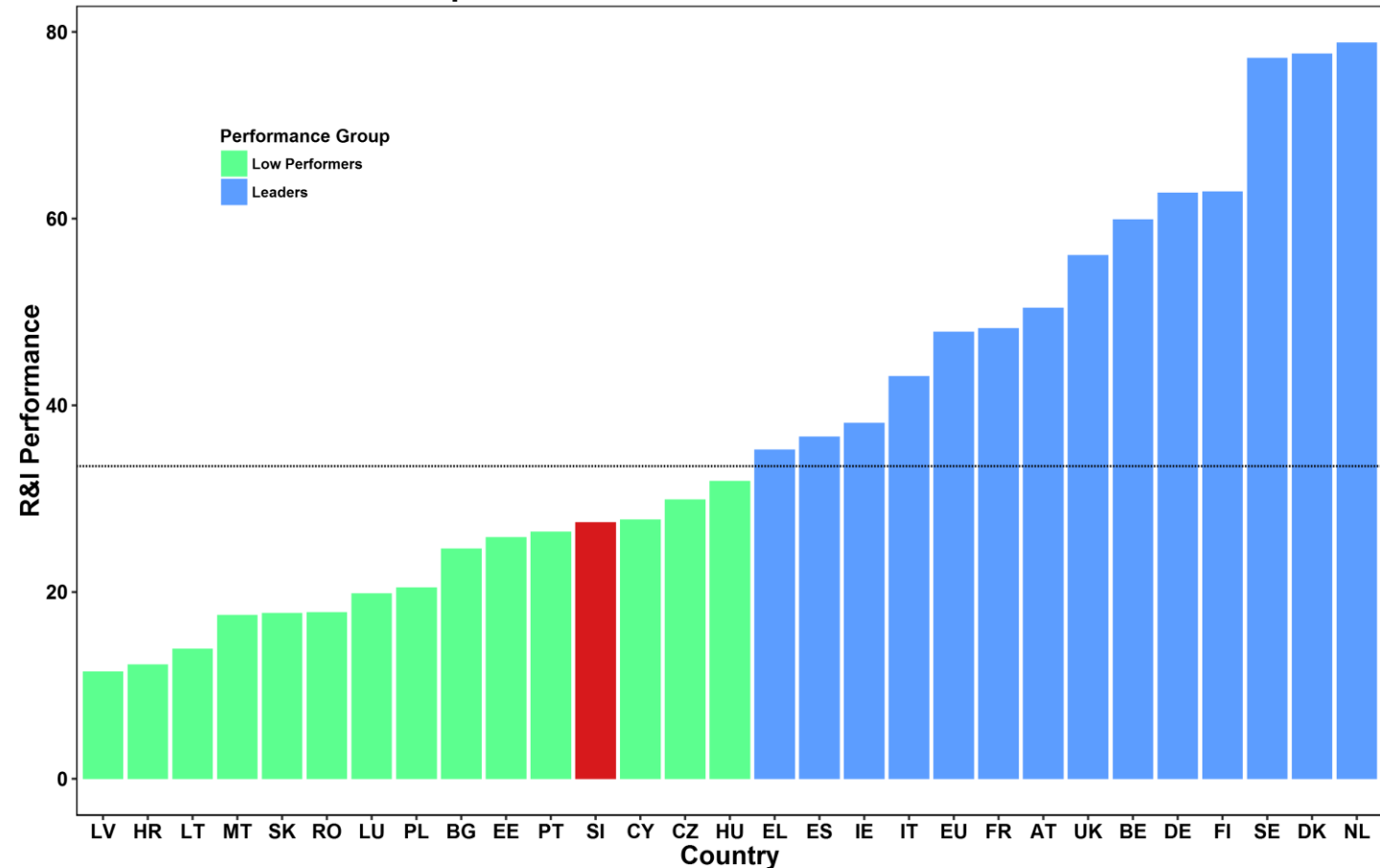
Adapted from Figure 1 of the Innovation Union Scoreboard 2015, using data from the IUS 2015 Database

EU Performance



- Innovation follower
- Low R&I performing country

Composite Indicator on Research Excellence



Data from "Research and Innovation Performance in EU Member States and Associated Countries 2013"

InnoRenew CoE



- Advanced Partner
- Slovenian Consortium

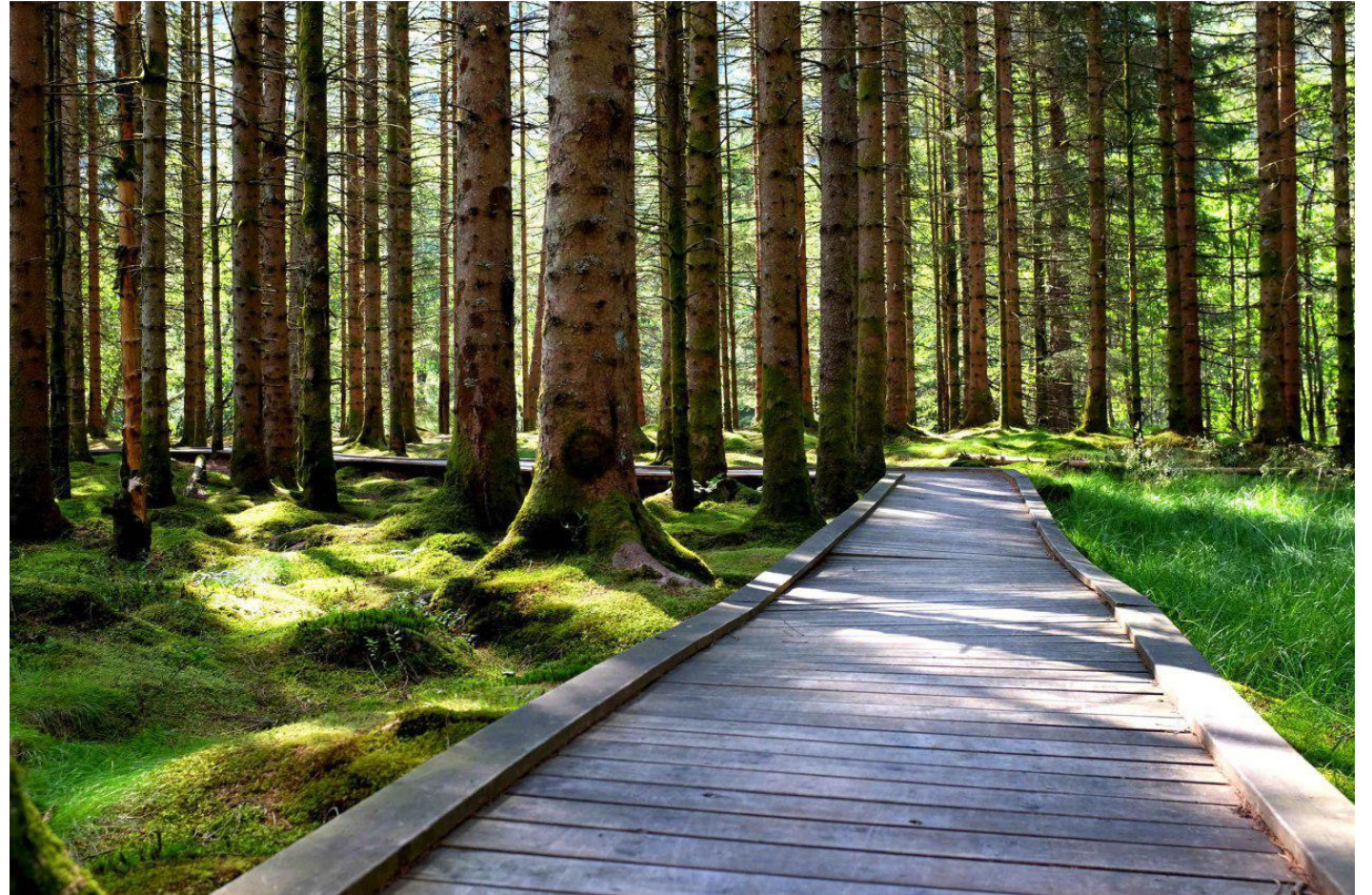


Photo Credit: Mike Burnard

Preparation



- Stage One – Business Plan Preparation
 - Market Analysis
 - Current State
 - Challenges
 - Opportunities



Slovenian Buildings



- Primorska and Karst



Photo Credit: Mike Burnard

Slovenian Buildings



- Primorska and Karst



Slovenian Buildings



- Mountainous regions



Photo Credit: Mike Burnard

Slovenian Buildings



- Brick, concrete, and stone



Slovenian Buildings



- Building by regions



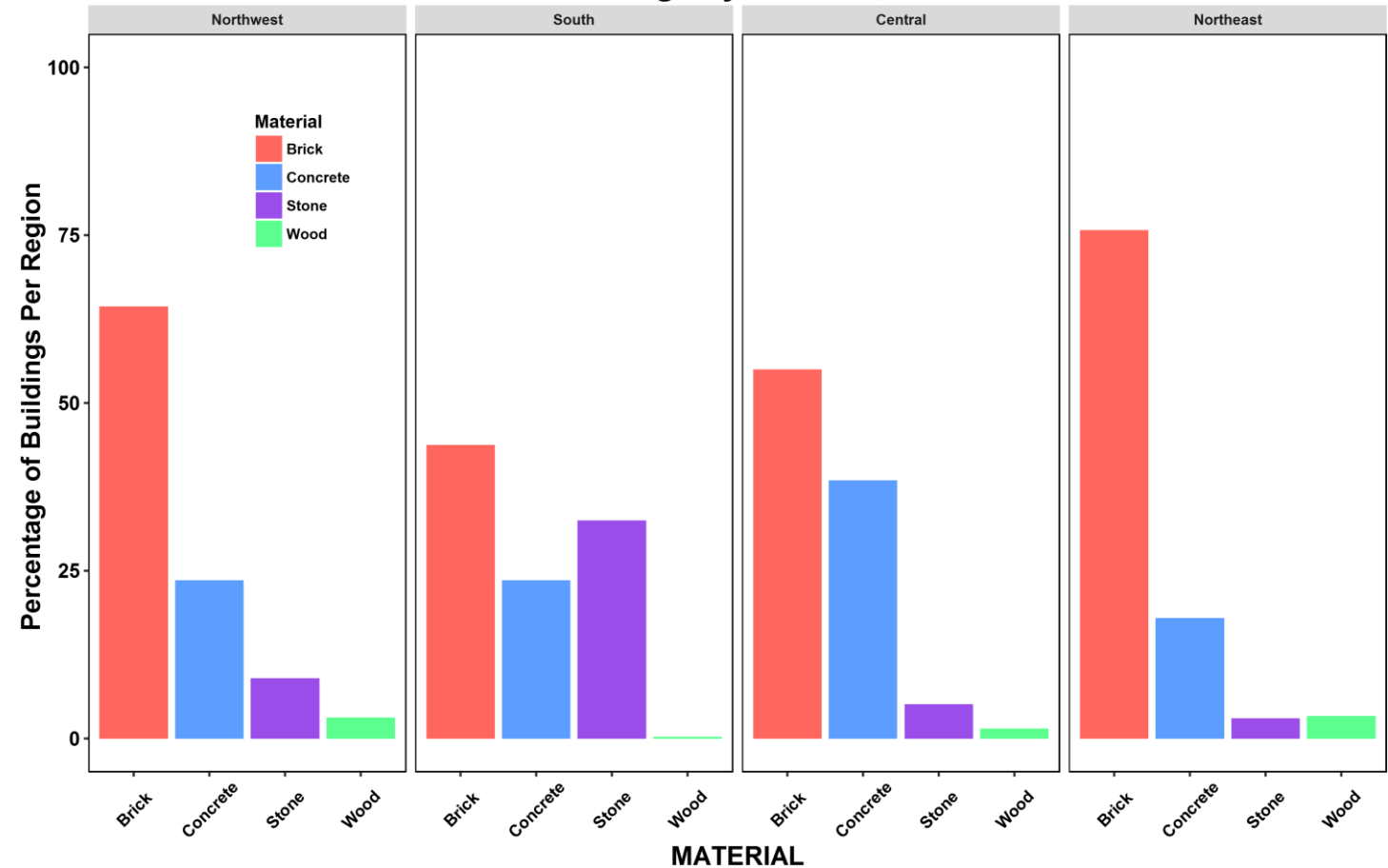
Figure adapted from d-maps.com

Slovenian Buildings



- Materials used in load bearing structures

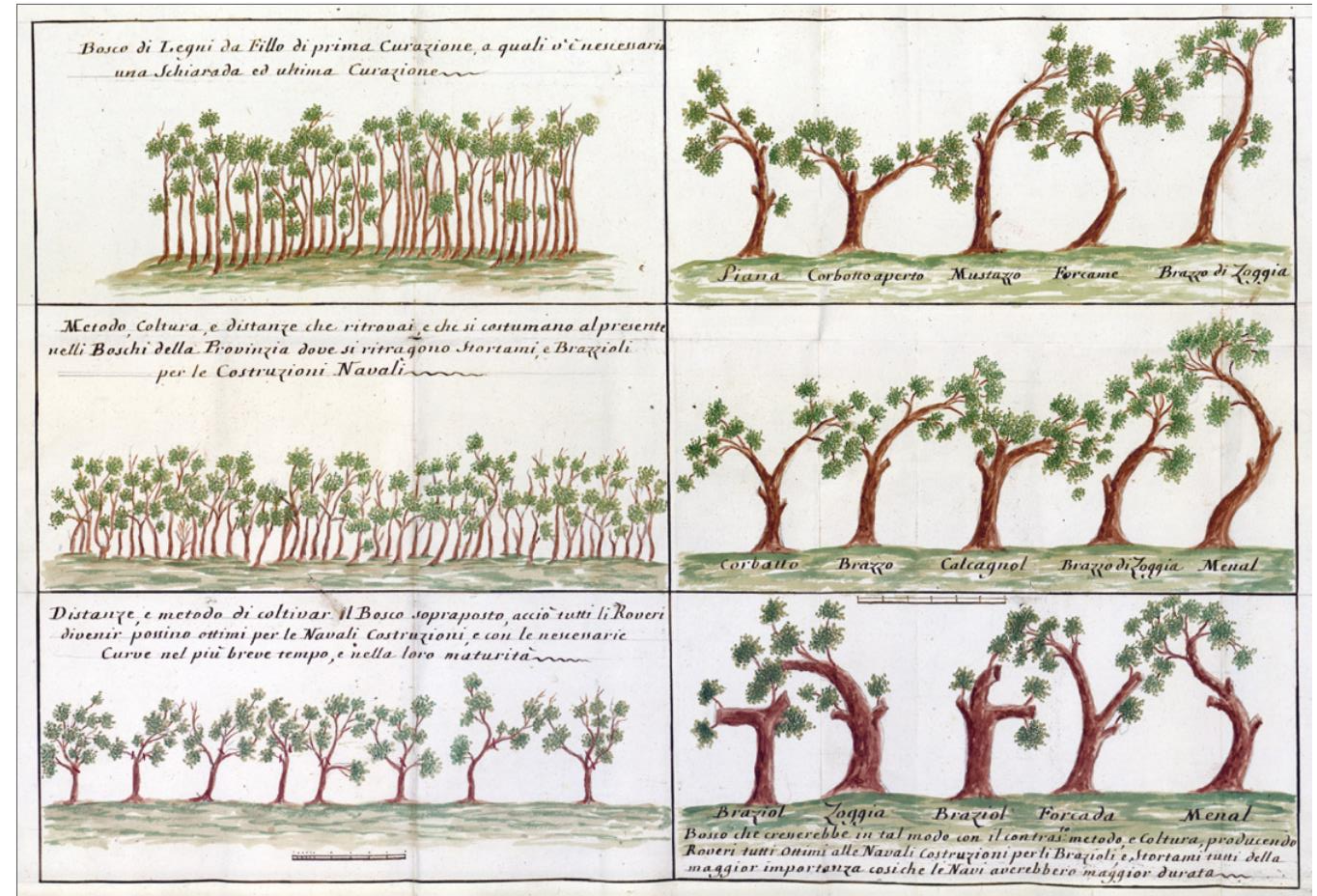
Slovenian Buildings by Material, 2002 Census



Data from SURS, 2015

Tradition

- Tradition of forestry and silvicultural practices



<http://www.hippocampus.si/ISBN/978-961-6963-35-0.pdf>

Tradition



- Tradition of forestry and silvicultural practices



<http://www.hippocampus.si/ISBN/978-961-6963-35-0.pdf>

New Traditions



- Residential Area in Smrjene
- Prefabricated Housing



<http://www.springer.com/gp/book/9783319036342>

New Traditions



- The Punkl Youth Hostel
- Prefabricated CLT



<http://www.springer.com/gp/book/9783319036342>

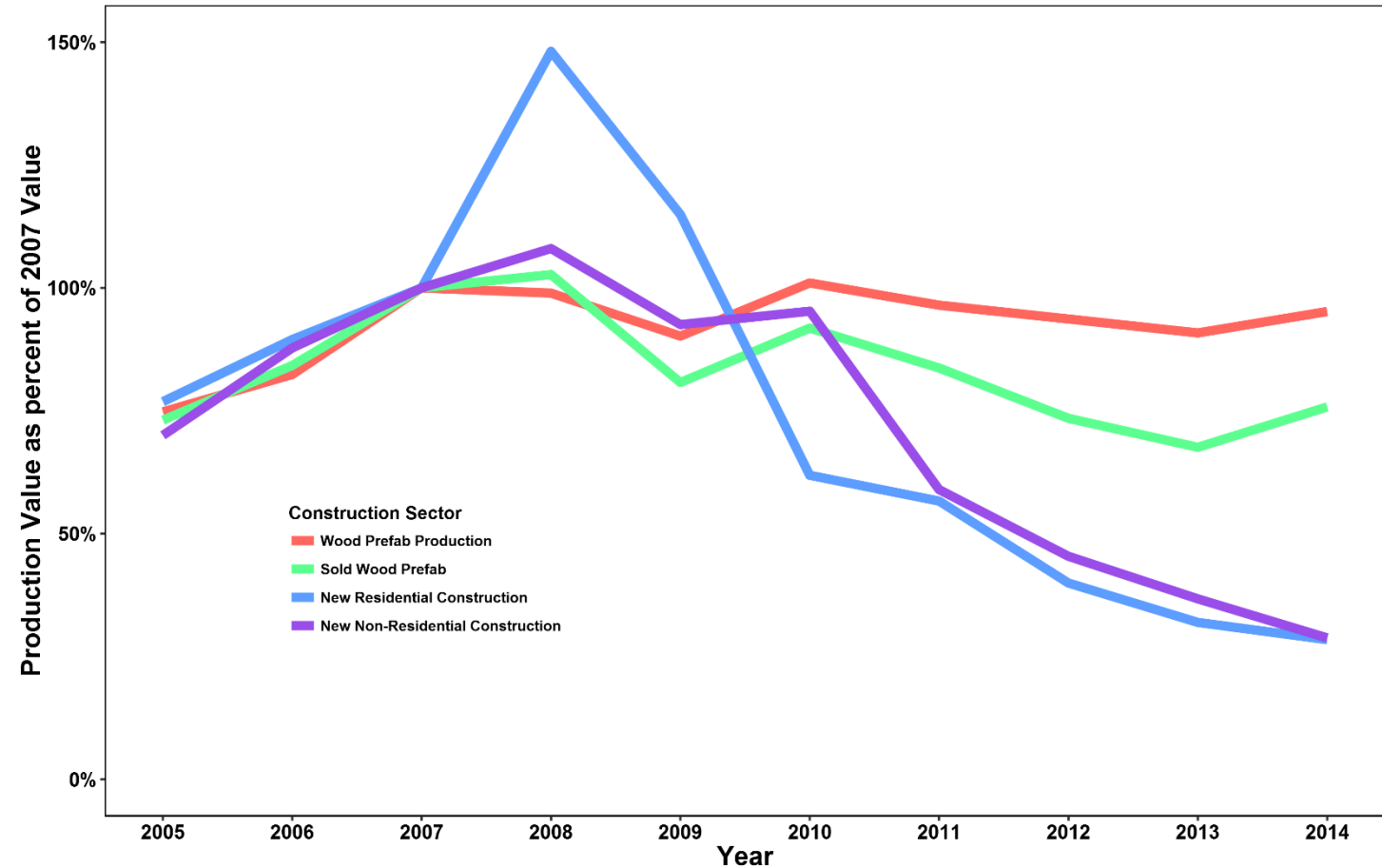


Wooden Construction



- Prefabricated Buildings
- Stability provides possibility

Wooden Prefab Construction vs. Construction



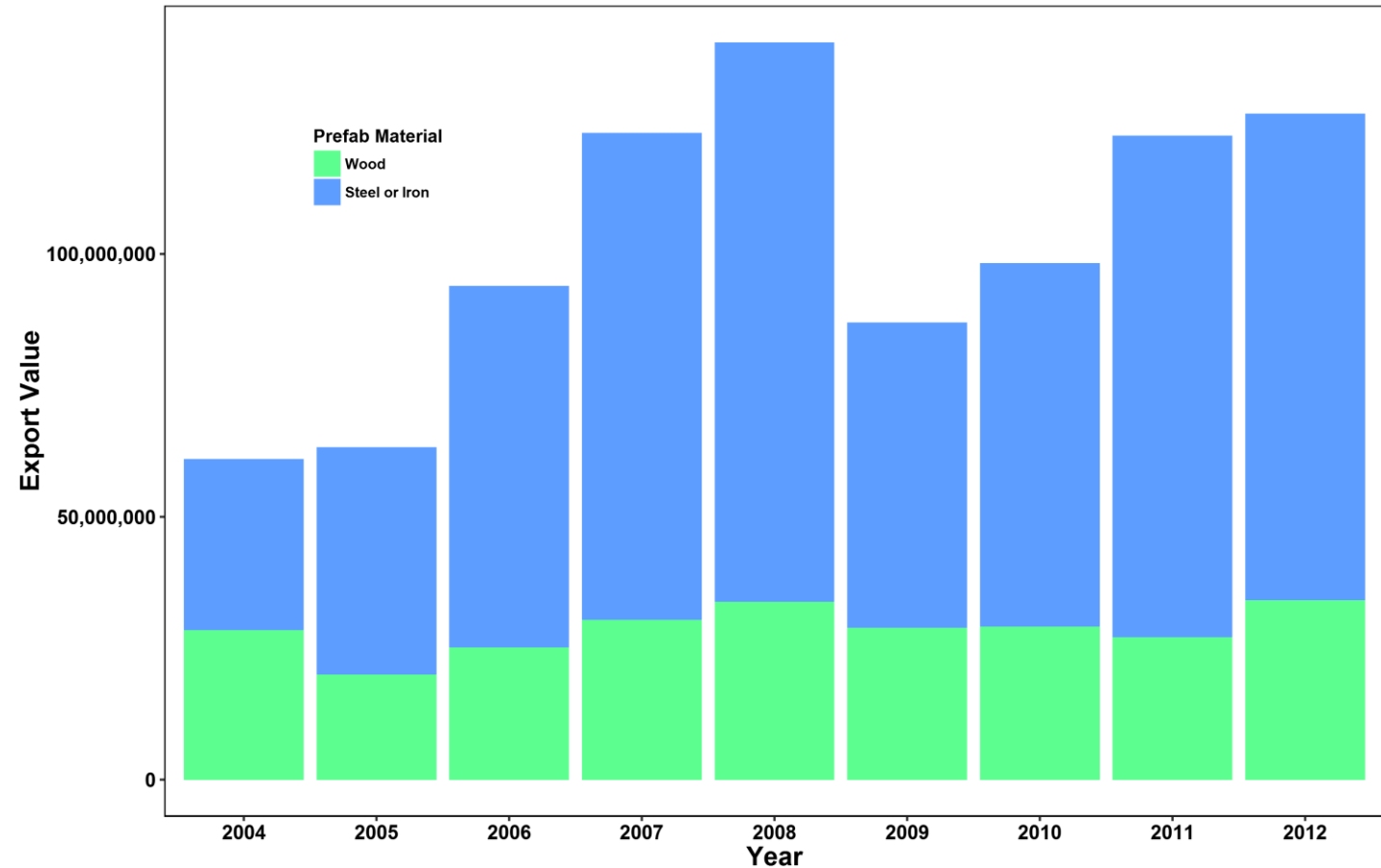
Data from SURS, 2015

Wooden Construction



- Prefabricated Buildings
- Renewables in Production

Prefabricated Homes in Slovenia

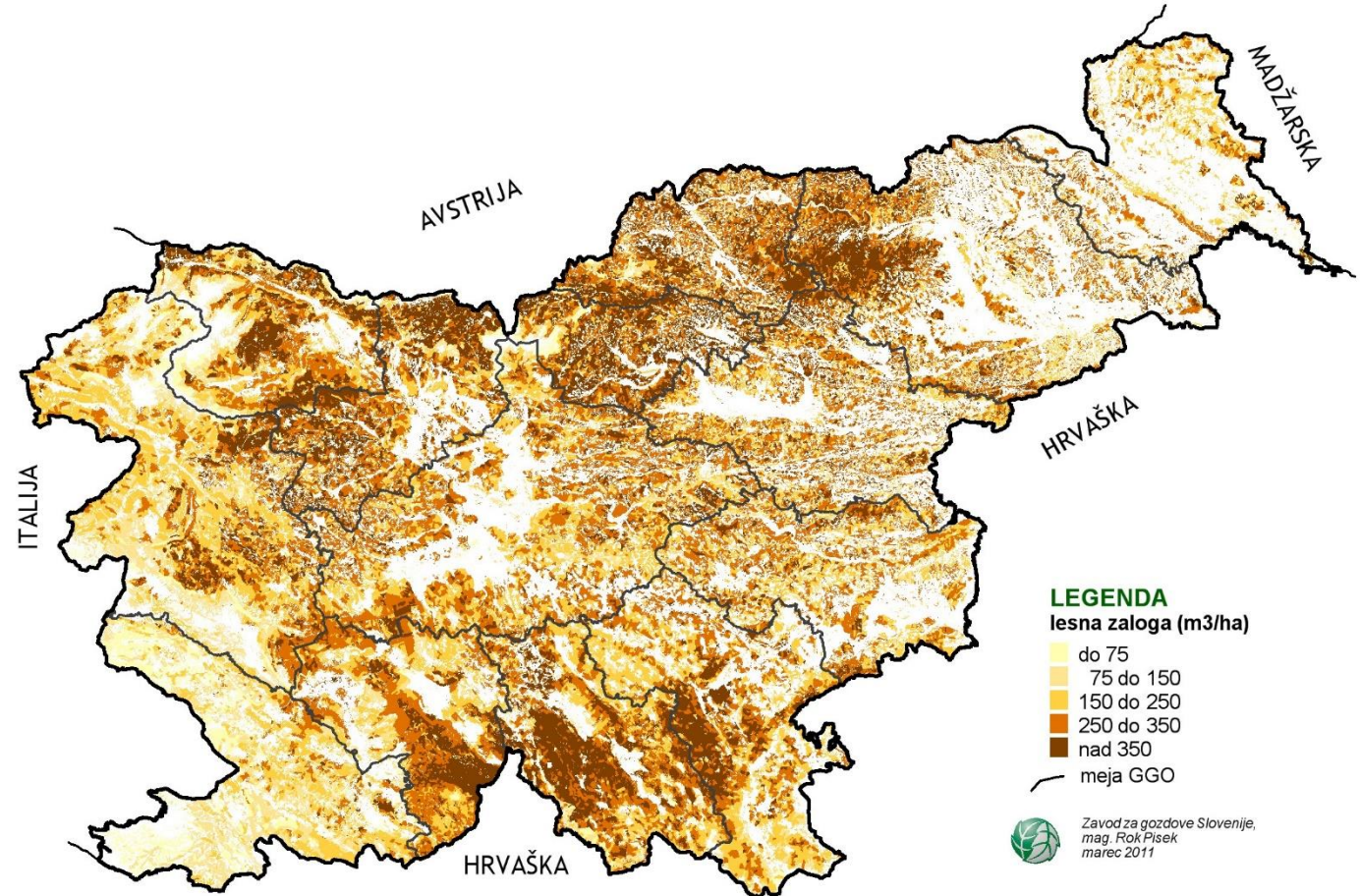


Data from Eurostat Prodcom, 2015

Forest Resources



- Large growing stock
 - 58% forest cover

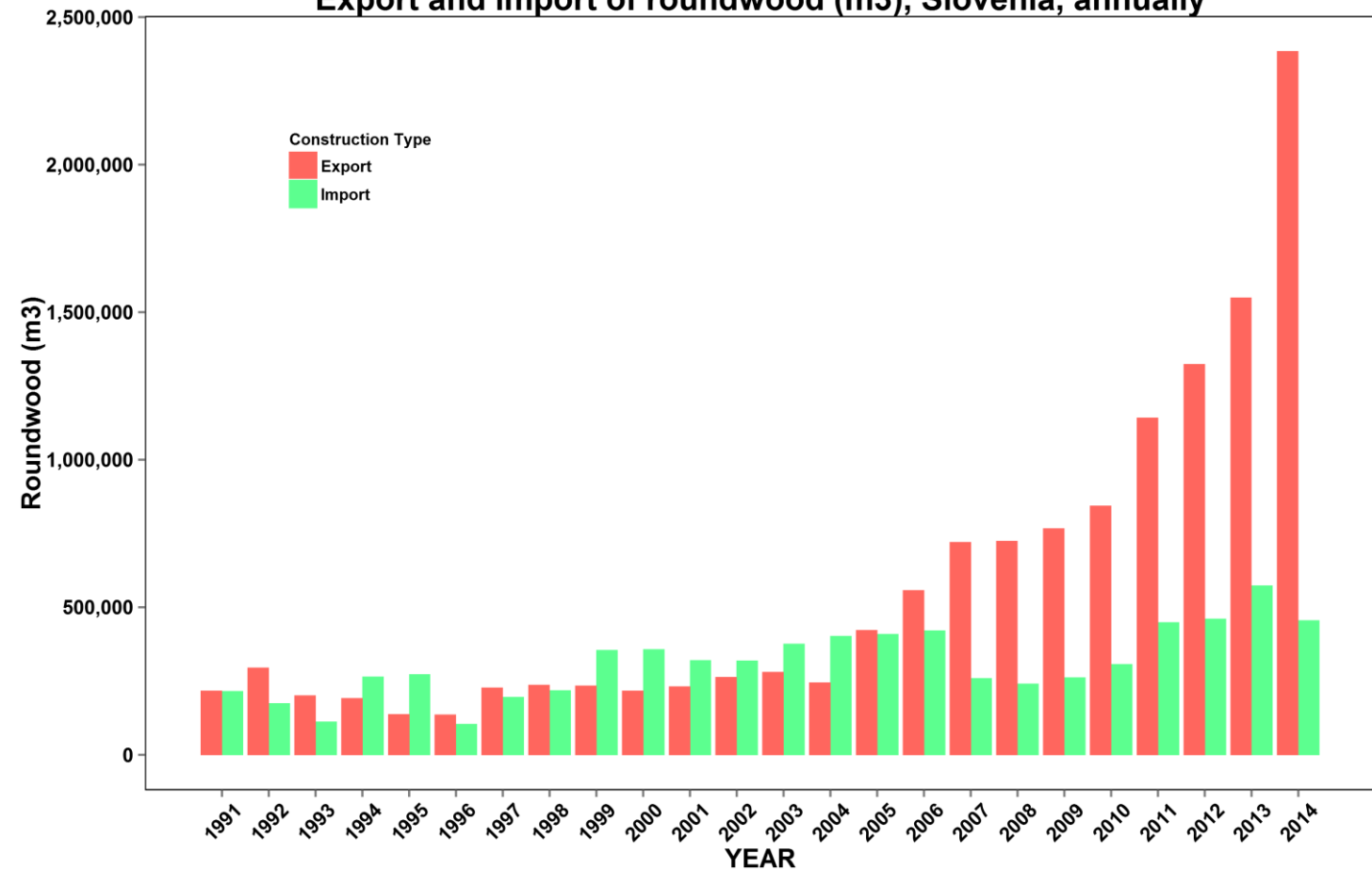


Forest Resources



- Roundwood predominately exported
- Trend change in 2004 and 2007

Export and import of roundwood (m3), Slovenia, annually

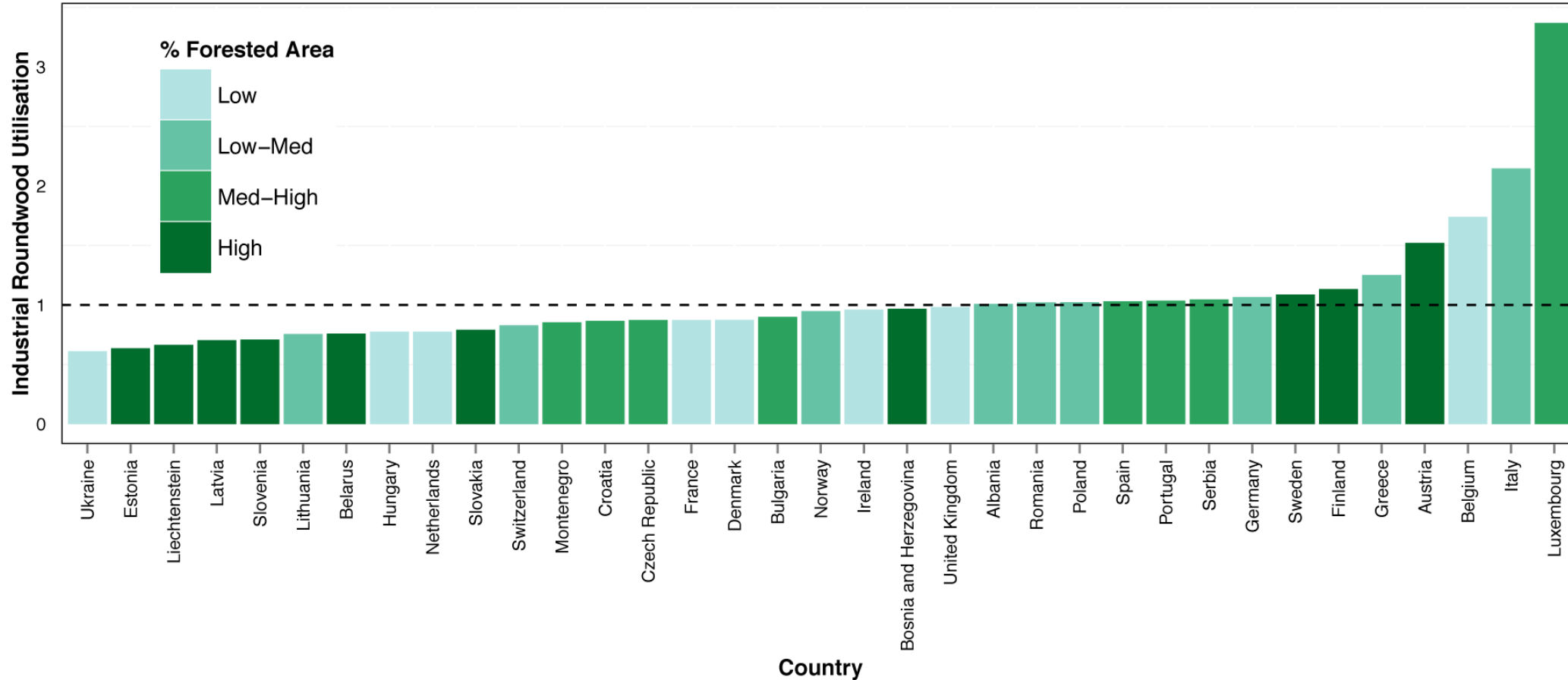


Data from SURS, 2015

Forest Resources



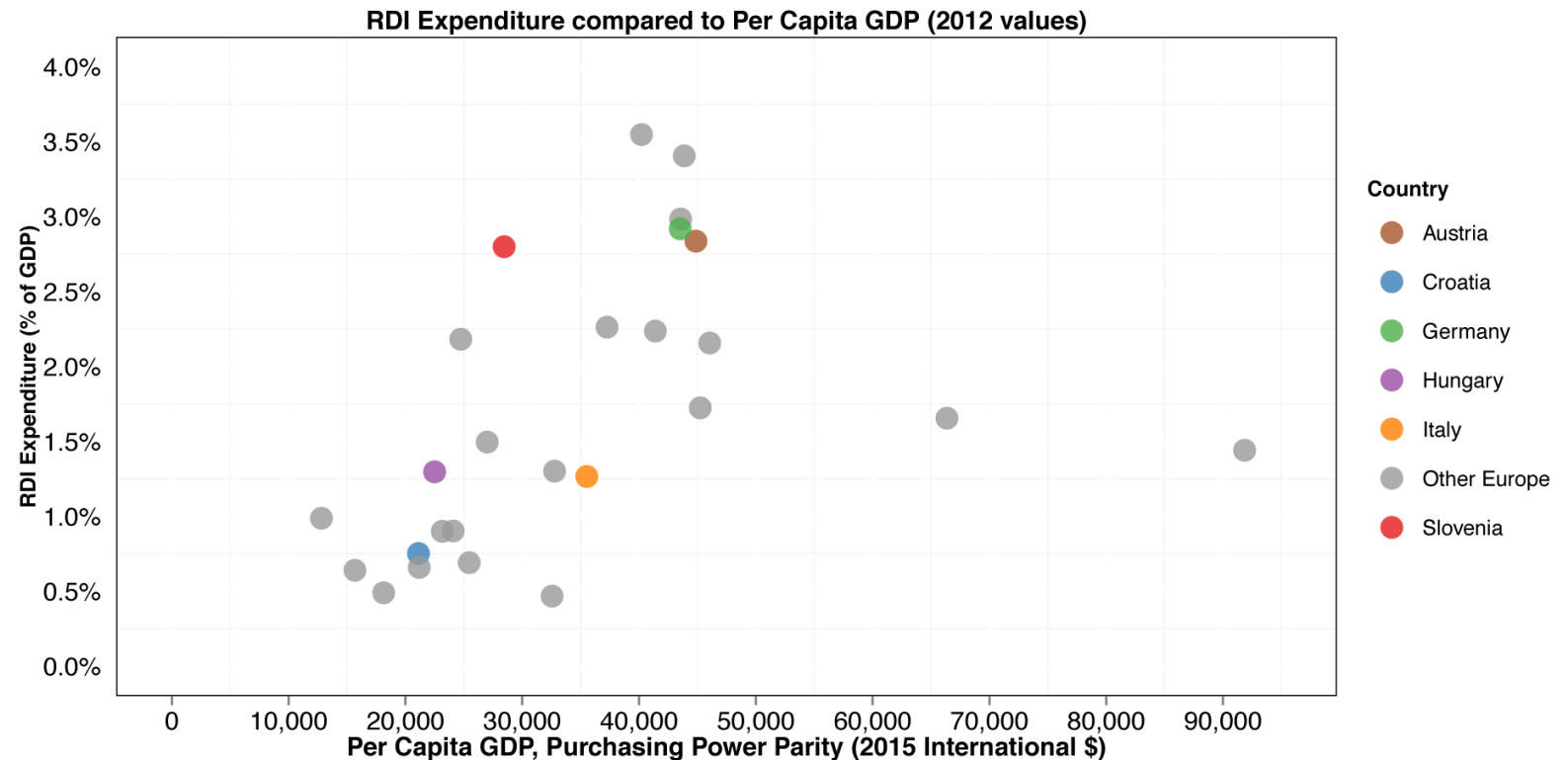
Mean Industrial Roundwood Utilisation Ratio (2008–2004)



Research Landscape



- RDI Expenditures
 - State
 - Private



Data: World Bank, 2015

Research Landscape



- Productivity
- Quality
- Number



Data: World Bank, 2015; SCImago, 2015

InnoRenew CoE



- Ultimately the InnoRenew CoE would like to help the Slovenian wood value chain be strong and successful
- Not only achieved through new technologies
 - Perceptions
 - Education
 - Scientific Excellence



InnoRenew CoE



- Thank you!

