



Business Plan

CEN/TC 172 PULP, PAPER AND BOARD

Introduction

CEN Technical Committees and Business Planning

The extension of formal business planning to CEN Technical Committees (CEN/TCs) is an important measure, which forms part of a major review of business processes (known as 'Optimization'). The aim is to align the CEN work programme with expressed market needs and to ensure the adequate researching of projects through their development stages in the CEN/TCs. Your role in the implementation of the Business Planning concept will contribute significantly to the overall effectiveness of European standardization.

We express our sincere appreciation and thanks for your time in reviewing this Business Plan.

European standardization and the role of CEN

The foremost aim of European standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

The use of standards by industry and the social and economic partners is always voluntary; however, European standards are sometimes related to European legislation (Directives), and conformity to such standards may constitute a presumption of conformity to the legal requirements of the Directives (which must be met by manufacturers before certain products can be traded legally within the Single Market).

Three bodies are responsible for the planning, development and adoption of European standards: CEN (European Committee for Standardization) is responsible for all sectors excluding electro technical, which is the responsibility of CENELEC (European Committee for Electro technical Standardization), and most of the Information and Communications Technologies, which are largely the responsibility of ETSI (European Telecommunications Standards Institute).

CEN is a legal association, the members of which are the National Standards Bodies (NSBs) of **33** European countries and seven Associates (organizations representing social and economic interests at European level), supported by a CEN/CENELEC Management Centre (CCMC) based in Brussels. It is the European counterpart of ISO (International Organization for Standardization) with which it has a standing protocol (the 'Vienna Agreement') to facilitate technical co-operation.

The principal deliverable of CEN is the European Standard (EN), which must be published by each of NSBs as an identical national standard, with any pre-existing national standards in conflict being withdrawn.

A European Standard embodies the essential principles of global openness and transparency, consensus, technical coherence and national commitment. These are safeguarded through its development in a CEN Technical Committee (CEN/TC),

representative of all interested parties, supported by a public comment phase (the CEN Enquiry). CEN and its Technical Committees are also able to offer the Technical Specification (CEN/TS) and the Technical Report (CEN/TR) as solutions to market needs.

More recently, CEN has created the CEN Workshop Agreement (CWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by CEN and its national members. An important distinction is that the CWA is developed by CEN Workshops, comprising only participants with direct interest, and so it is not accorded the status of a European Standard.

Recognising the importance of market certainty in the use of European Standards, CEN and CENELEC jointly offer a European Mark (the Keymark), which is a third-party certification mark through which compliance with European Standards can be demonstrated. Proposals for European Mark Schemes may be proposed by the CEN national members, the CEN Technical Committees or any European organization

Scope of the CEN/TC

Standardisation of nomenclature, test methods and specifications in the area of:

- fibrous raw materials for pulp manufacture, such as pulpwood;
- recovered paper;
- pulps;
- auxiliary materials specifically intended for paper and board manufacture, such as fillers, pigments, starches and binders;
- papers (including paper and board) and in particular printing and administration papers; industrial papers and speciality papers; tissue paper and tissue products; packaging papers including corrugated board,
- products mainly consisting of pulp, paper and board, including coated, impregnated and laminated papers, printed or unprinted, as well as materials for packaging and packaging aids but excluding finished packages.

Market, Environment, and Objectives of the CEN/TC

This section establishes a sequential development of thoughts regarding the market for which the CEN/TC 172 aims to fulfil the needs. This sequence of thoughts starts from a description of the current market situation relevant to the product or product grouping under consideration by the CEN/TC, continues on to an analysis of the different factors motivating/influencing the activities of the CEN/TC, to come to clear description of objectives for the CEN/TC, together with an accompanying strategy how to reach those objectives. Finally, a general 'risk analysis' is included highlighting issues that may delay or stop the CEN/TC achieving its set objectives.

Market Situation

The pulp, paper and board industry is of major European importance, both in the manufacturing and converting sectors and commercially, with a current annual West European production of about 90 000 000 tonnes. The majority of pulp, paper and board products for graphic and packaging purposes, such as newsprint, administration papers, linerboard, paper board etc., can be classified as having "standard" properties and specifications which are accepted by manufacturers, consumers, trade, public authorities and non-governmental organisations in all countries involved in European commerce.

Over the last ten years, the structure of the European Market has totally changed.

One of the reasons is the new political and economical orientation of the Middle and Eastern European countries.

Other important reasons are the involvement of non-European companies from Canada, USA and the Republic of South Africa that acquired several European paper and board mills, and the merger of European companies into large and competitive combines.

And this concentration process is still ongoing in Europe.

Because of ample supplies of large quantities of natural resources, e.g. wood and water, the Scandinavian countries play an important role in the European pulp, paper and board industry supplying the European market with pulp and paper made from virgin fibres. Economical reasons and environmental legislation have led the other European countries more or less to specialise in paper production based on recovered fibres. However, this does not result in a polarisation of the European Market place because of strong interdependencies between both market segments.

Another item could be of high importance for the European trade.

From the 1st January 2002 a common European currency has been implemented in several areas of the European Union, the Euro. Up to now, the European Union spans 28 countries with about 502 millions habitants. Eighteen countries settle wares, goods and services in the currency Euro.

1 BUSINESS ENVIRONMENT

Political, economical, social, technical, legal and international factors that either directly require some or all of the standardisation activities proposed by the CEN/TC 172, or significantly influence the way these activities are carried out are the following:

1.1 Political Factors

A Council of Europe resolution on "Paper and Board in Contact with Foodstuffs" has been discussed since many years. Several recommendations concerning the basic requirements and methods of analysis for hazardous chemical substances were issued for packaging materials and articles which are intended to come into contact with foodstuffs, but not for paper at this moment. However, representatives of the paper and board industry are more and more involved in this discussion and co-operate with representatives of the European governments.

Up to now, this discussion has not been finished. Nevertheless, CEN/TC 172 has to take into account that regulations for paper will come up.

Another important aspect is the efforts of the industry to improve waste water treatment and waste water discharge as well as to reduce specific water consumption.

Because of different legislation's within the European Union the costs incurred by the pulp, paper and board industry to meet national regulations depend on the company location.

Additionally, CEN/TC 172 has to observe the future development of IPPC (Integrated Pollution Prevention & Control Directive).

1.2 Economical Factors

The paper and board industry is very capital intensive which puts quality and consistency at a premium. Market demands force the paper industry to invest into the highest available level of technology and equipment.

Manufacturers of graphic paper grades should take developments in digital printing into account which seem to gain increasing importance.

Manufacturers of packaging paper grades are under the pressure of different legal actions to minimise the amount of packaging material.

1.3 Social Factors

Modern paper manufacturing has developed to a computer-controlled high tech process. Consequently, the number of employees went down from year to year. On the other hand the employees need to be increasingly skilled in computer technology and process control.

Additionally, the paper industry has to face more and more ecological aspects of wood consumption, converting and recycling. To prevent future additional legal regulations, the paper industry is going to formulate self-commitments in terms of certifications of sustainable forest management, quality management systems for forestry and recycling rates.

1.4 Technical Factors

Due to the fact that converting machinery such as fax apparatus, copy machines, printing machines etc., has made a lot of progress with respect to web speed and other technical aspects, requirements for paper and board have partially changed and have to be re-specified accordingly.

Another point is the suitability of paper for new printing technologies that will necessitate the development of new grades of paper and board.

Test methods for paper and board should be as precise as necessary. It is therefore important that all test methods are validated, by carrying out interlaboratory comparison tests with a high number of participating labs, before the test methods are published. Bad precision data may indicate that a calibration hierarchy for the instruments involved in the test is needed. Bad precision data also indicates that the method can not be used in trade since two laboratories (seller and buyer) might not get the same result when testing.

European pulp and paper laboratories are encouraged to participate in CEPI-CTS (Comparative Testing Service) in order to check the compliance of their results with results from accredited labs, i.e. the CEPI-CTS "true value".

1.5 Legal Factors

Today, there exist the European Packaging Directive, a European Product Liability Regulation, the European Hygiene Directive and European Safety Regulations for Machinery. In addition, there are numerous national laws and regulations governing, e.g. paper and board intended to come into contact with foodstuffs, packaging and packaging waste. The Hygiene Directive will be implemented in the paper industry by introducing GMP (Good Manufacturing Practice) measures.

All these regulations and directives form an essential part of the European Standards developed by this committee.

1.6 International Trade and Standardisation Aspects

CEN/TC 172 supports the interests of its involved parties in European standardisation of pulp, paper and board in

- mastering the variety of modern business by concentrating on a range of core products;
- promotion of trade by eliminating trade barriers caused by various national habits and traditions;
- fostering market transparency and making provision for international requirements in terms of both exports and imports;
- facilitating communication by common understanding and common reference;
- enhancing the quality of life by ensuring safety, health and environmental protection;
- harmonising work programmes and avoiding duplication of work efforts through close liaison with the relevant ISO and CEN committees, especially with ISO/TC 6 and CEN/TC 261;

CEN/TC 172 regards the elimination of trade barriers as an important function because of the importance of paper and related products as a significant contribution to the economic health of many producing countries.

2 OBJECTIVES OF THE CEN/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

Based on the considerations above, the CEN/TC 172 proposes the following objectives and strategic directions for its future work:

2.1 Objectives of the CEN/TC 172

- to ensure in-time availability of adequate and up-to-date standards for current and future developments of new pulp, paper and board products;
- to work at all time on issues representing real priority needs, taking into account available resources;
- to support the operation of the European Single Market to facilitate trade and exchanges and ultimately to increase customer and end-user satisfaction;
- to support European legislation, directives, etc.;
- to meet European concerns relating to health and environmental protection;
- to meet European concerns relating to material and product safety and quality.

Up to now, the following concrete objectives are identified:

- elaboration of European Standard test methods for the determination of hazardous chemical substances in packaging materials and articles intended to come into contact with foodstuffs;
- elaboration of European Standards dealing with test methods for determination of pulp quality;
- elaboration of European Standards for administration, office, and graphic papers which specify the required properties, including relevant test methods;
- elaboration of European Standards dealing with test methods for the quality of tissue paper and tissue products as well as harmonization of tissue terms and definitions;
- elaboration of European Standards dealing with test methods for optical properties of paper and board;
- elaboration of a European Standard which specifies recovered paper and board in different grades and especially a permanent accommodation of the grades to the market (common EU classification for trade);
- elaboration of a European Standard which specifies world-wide paper dimensions;
- take over existing ISO/TC 6-Standards wherever possible and wherever demanded.

2.2 Strategies adopted to reach the Objectives

In order to achieve the above objectives, CEN/TC 172 will follow the lines of action given below:

- preparation of new European Standards by using national Standards or company Standards as a reference document
 - where no appropriate Standards exist for use as reference document
 - in areas not covered by ISO standards
 - or where ISO respond times are unlikely to match European needs
- modification or to promote revision of ISO Standards that do not adequately take important European interests and conditions into account;
- co-operation with ISO/TC 6 and, if appropriate, in an early stage by application of the Vienna Agreement;
- adoption of ISO Standards only provided these Standards are considered necessary for harmonisation within Europe;
- co-operation with other international, European, governmental, economic, professional and scientific organisations on questions linked with the standardisation of pulp, paper and board.

To reach a high grade of efficiency, CEN/TC 172 decided to work without Subcommittees, but with Working Groups.

One of the main reason is that each co-operation and consultation is more direct. Experiences showed that this procedure saves a lot of time money and other resources.

This is the reason why CEN/TC 172 is interested in different fields of standardisation work. Need for co-operation in the following areas has been identified:

- CEN/TC 261 „Packaging“

2.3 Risk analysis

The main risks for a delay can be described as follows:

- merging of important European companies lead to a change of management culture. As a result members of technical staff have to work under new priorities and increased work load. Standardisation tasks which were assumed by experts can either not be completed in time nor with poor progress;
- expensive and time consuming research work prior to interlaboratory tests;
- insufficient support given to the experts, especially convenors, by the National Standard Bodies with respect to formal procedures and CEN-regulations;
- insufficient support of the secretaries of the working groups by the interested parties with respect to translations;
- insufficient participation of users and other interested parties and national standardisation bodies in the standardisation of paper, board and pulp;
- occasionally delays caused by CEN-administration which do not seem unavoidable;
- retarded publication of ISO standards results in delay of taking over ISO-Standards by PQ- or UAP-procedure.

3 WORK PROGRAMME

This section gives an overview of existing and planned standardisation projects, called Work Items (WI). The aim of this listing is to demonstrate the adequacy of the proposed programme of work with the actual market or stakeholders' needs. You will find that the projects are listed according the Working Group that is responsible for the drafting of the documents. More comprehensive information regarding the CEN/TC structure can be found under the next section 'CEN/TC Structure and Resources'.

4 ENVIRONMENTAL ASPECTS

4.1 Efficient use of material

For the manufacturing process of the semi product "pulp", some natural resources will be polluted.

This includes mainly

- wood;
- water;
- energy (e. g. gained from water..

Paper manufacturer and converter are always exerted to reduce the consumption of resources or to make sure that resources, e. g. like wood, grow again.

The permanent researches and enhancements of all processes has yielded to a continued reduction of water, energy and consumption of raw materials.

4.2 Recycling

Paper is made from renewable primary products but that is not all.

Finished products of paper (e. g. paper sheets, packaging materials) which have achieved their primary purposes cannot become labelled as waste but as raw material.

The recycling rate in the European Union was identified by 69 %.

5 EUROPEAN PUBLICATIONS FOR THIS CEN/TC

This section gives a list of European Publications that have been published by the CEN/TC and the information whether or not their references have been published in the Official Journal of the European Communities.

'Published Standards'

http://standards.cen.eu/dyn/www/f?p=204:32:0::::FSP_ORG_ID,FSP_LANG_ID:6153,25&cs=1D77547DCDFDC8ECBAF7C26F49D22AD6F

6 CEN/TC Structure and Resources

This section gives an overview of the existing and planned standardisation structure for this CEN/TC and its resources, which are required to be able to elaborate the above listed

projects. Only structures directly responsible for standardisation projects (WIs) are listed. Therefore, no co-ordination or advisory groups are included. Again, the aim of this listing is to demonstrate the adequacy of available resources with regard to the anticipated workload.

http://standards.cen.eu/dyn/www/f?p=204:7:0:::FSP_ORG_ID:6153&cs=16E01FE9873E700BD96F3C54A731C930E