

The Secretariat for International Forestry Issues



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EDITORIAL

The interest in rehabilitating degraded forests has increased radically. One reason for this is the growing interest in furthering the role of forests as a sink for CO₂. Just now reduced deforestation is the hottest topic but the interest to rehabilitate degraded forests is increasing fast. Successful worldwide rehabilitation, potentially affecting 1–2 billion ha degraded forests/vegetation, would be good for mankind, but it could prove to be a challenge for millions of poor people utilizing these areas. This concerns both intensive industrial plantations and small-scale farm forestry.

If programmes for restoration are to succeed on a large scale we must try to learn from failures as well as successes. This is the reason why SIFI started a project to learn from the Bai Bang project in Vietnam, initiated by a large Swedish group of senior advisers. This work has been carried out through round table discussions in col-

laboration with the Institute for Security and Development Policy (ISDP) and the Institute of Policy and Strategy in Agriculture and Rural Development (IPSARD) in Vietnam. It is clear that one of the world's highest rural population densities causes major land use challenges. Trainee Marcus Hallenberg has compiled a report on the history of Bai Bang and its importance for rural development, including a summary of key reports.

The 11th issue of SIFI's newsletter presents forestry in Vietnam and specifically lessons learnt from Swedish experiences in Bai Bang. This newsletter is prepared as a background for the culmination of the project, the seminar on 3 June at KSLA entitled *Experiences from Bai Bang with global reflections*. Finally, I would like to thank all the authors, the senior advisers, ISDP, IPSARD and not least Professor emeritus Reidar Persson for indispensable contribution to a successful project.



Fredrik Ingemarson, editor

Vietnam forestry sector

NGHIA DAI TRAN,

Institute of Policy and Strategy in Agriculture and Rural Development (IPSARD) in Vietnam

Vietnam has a total natural area of about 3,300,000 km² of which three quarters is mountainous and upland areas. These areas are home to 25 million people of many different ethnic groups. The forest in Vietnam has been classified into three different forest types, i.e. the special-use forest (2.4 million ha), the protection forest (7.3 million ha) and the production forest (8.2 million ha). Among some 18 million ha of the forest land, about 12.5 million ha are already allocated, contracted or leased to institutions, communities, businesses or private households to manage, to protect or to develop.

In the last 10 years, the forest industry in Vietnam has enjoyed a growth rate reaching VND 20,130 billion (USD 1 billion) in 2011. Individual and private owners are among the most effective production forestland owners in Vietnam while they hold just about 21 per cent of the total forest area, whereas the state owned forest enterprises (SOEs) and other collective forestland owners hold a majority of the forestland but have not managed and developed the forests effectively or efficiently.

Landconflict

in Vietnam's rural economy

Vietnam has in recent years struggled to sustain strong growth and development, particularly within its rural economy. While more than 70 per cent of the population live in rural areas in the country, recent reforms have not always given the agricultural sector the same attention as industrial growth.

ELLIOT BRENNAN & JENSE WIERSMA, INSTITUTE FOR SECURITY AND DEVELOPMENT POLICY (ISDP)

Policy advice to the Vietnamese government

In order to improve policy advice in the area of rural development and forestry in Vietnam, the Stockholm-based Institute for Security and Development Policy (ISDP), in partnership with Lund University and the Nordic Institute of Asian Studies (NIAS), is engaged in a Sida-sponsored partner driven cooperation project with the Institute of Policy and Strategy in Agriculture and Rural Development (IPSARD) in Vietnam. The aim is to support IPSARD's economic and policy research capacity and support the development of policy advice to the Vietnamese government.

Many problems persist in promoting a balanced and peaceful development of the rural economy. The effects of climate change, deteriorating soil quality, as well as the high cost and low return of farming, all complicate growth. Further, recent land disputes have attracted increasing attention. The lionizing in the media of a group

of farmers in a land dispute in Hai Phong has increased the likelihood of future conflicts as popular discontent has increased.

Unclear land tenure and institutional frameworks

Longer land leases and increased plot sizes would improve several aspects of the current quagmire in rural development, particularly for small-forest owners. Defining unclear land tenure is the simplest way to correct and prevent land disputes. This also needs to be supported by relevant and improved institutional frameworks, while effective avenues for arbitration, dispute and settlements are also needed.

Reducing conflict through co-management has proven successful in some provinces, such as witnessed on a recent ISDP fieldtrip in the southern province of Kien Giang. Notably, in the province's national parks, greater efforts have been made in forest management through

the employment of local forest patrols to stop illegal logging, while greater forest fire awareness and fire fighting training has also increased among communities. Such measures decrease the risk of intra-communal conflicts.

In a country that has one of the world's highest rural population densities, effective and efficient rural management is an imperative for stability and growth, while land tenure issues must be addressed to improve productivity and growth. This, combined with better management practices, will allow for a renaissance of Vietnam's rural economy and forestry sector.



Photo: SSC-Forestry, Sweden.



Photo: SSC-Forestry, Sweden.

Background to the seminar 3 June at KSLA

The seminar *Experiences from Bai Baing with global reflections* highlights Swedish experiences from the development project in Bai Bang, Vietnam, and opens up a discussion about how these lessons could be applied in other parts of the world.

REIDAR PERSSON & FREDRIK INGEMARSON, SIFI

Restoration of degraded forests is very high on the agenda. The World Resources Institute (WRI) refers to the need to restore two billion ha of degraded land. Restoration work has been going on for a long time but has met many difficulties along the way. This affects both intensive industrial plantations and small-scale farm forestry. If programmes for restoration are to succeed on a large scale we must try to learn from both successes and failures.

Global Reflections

One can easily get the impression that plantations in the South are a great success. In reality many plantations have failed. Many projects run into social problems that attract attention in the domestic and international media. StoraEnso, Vattenfall, the Diocese of Västerås, SE-KAB, ADDAX and others have been engaged in biomass production in the South and evidently with good intentions. These enterprises have, however, experienced problems and severe criticism. It may be that some of the criticism is unjust, but it seems difficult for Nordic

actors to engage in biomass production in the South without running into real problems. Is it too difficult? Many argue that the best solution is to engage farmers in production, but this is also a real challenge.

in Stockholm, June 3rd, 2013.

The main reasons behind the success in Bai Bang

The bare hills around Bai Bang that looked like a desert in the 1980s are now covered with forests. The first plantations were established by state enterprises and co-operatives, but after the economic reforms in 1986 (Doi Moi) farmers started to plant trees as a commercial crop. Today, it is reported that more or less all the wood for Bai Bang is directly or indirectly produced by farmers. It is interesting to note that the farmers seem to have adjusted the original "intensive" method to suit their own conditions. The open landscape around Bai Bang has been converted into forest, but in spite of this there is no talk of conflict. The seminar focuses on the main reasons behind this success, e.g. the establishment of a reliable market and the allocation of land to farmers.

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The historical background in Bai Bang

After lengthy discussions between Sweden and Vietnam in the early 1970s the parties agreed in August 1974 to build a combined pulp and paper mill with a designed capacity of 48,000 tons of pulp and 55,000 tons of paper.

PETTER OTTERSTEDT, SENIOR ADVISER



Office in the Vietnamese hills, early 1980s. Photo: Mats Sandewall.

The original idea was to use a mix of long and short fibres as raw material for the mill. Planted pine was to be the long fibrous base and Styrax tonkinensis the short fibrous base. Before the pine plantations were ready the long fibre supply should consist of bamboo.

The construction of the mill started in September 1975. At that time a forest nursery was already in place and trial plantations with pine had started. The mill was finally inaugurated in 1982. The first fibrous raw material arrived at the mill in the spring the same year.

An extensive road construction program

An important part of the project was to create a functioning organization for extraction of wood and bamboo including the supply of forestry tractors and trucks. An extensive road construction program with a supply of heavy road construction equipment was also a substantial part of the forestry project. A huge maintenance organization was set up including both stationary work-

shops and mobile units. Training of Vietnamese staff at all levels was of course an integral part of the project.

At the startup of the project rather large areas of Styrax and Mangletia glauca were already established on state forest enterprise land. There were also some smaller areas of eucalyptus, mainly on very poor soil. To meet the original goal to supply the mill with pine, rather extensive trial plantations with different species and provenances were started. Especially some of the Pinus caribaea plots had a good survival rate and increment. But before any evaluation was performed, plantations on a larger scale were established. The pine plantations were at

large a failure and it became gradually and painfully evident that pine was not the answer to solve the raw material problem.

Large bulldozers used for soil preparation

Tests started with Eucalyptus camaldulensis and some other species in the late 1970s. Production plantations of E. camaldulensis gained speed in the early 1980s. A main portion of these plantations were established on degenerated land belonging to farming cooperatives south of Bai Bang. Large bulldozers with rippers or plows were used for soil preparation. The growth of these plantations was very limited, but the "bare hills" were transformed into something that looked like forests.

The failed pine plantations together with the low production of the E. camaldulensis plantations and bamboo delivery problems increased the worries for the supply of raw material. Tests were now intensified with new species and provenances on better soils north of Bai Bang.

Certain provenances of Eucalyptus urophylla and Acacia mangium turned out to be very promising. Large production plantations were started by the mid-8os, mainly on forest enterprise land but gradually also on cooperative/private land.

Today the mill produces around 100,000 tons of paper. The pulp mill runs at full capacity and contributes 55,000 tons of pulp. The remaining pulp constitutes of

imported long fibre pine pulp from Indonesia. The total wood supply amounts to about 320,000 solid cubic meters consisting of Acacia and Eucalyptus. Note that no bamboo is delivered! Close to 60 per cent of the supply comes from the mill's own forestry organization and the remaining part from other forest companies and private farmers.

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An estimate of established forest plantations in the raw material area of Bai Bang.

| Species | 1969–1979 (ha) | 1980-1986 (ha) | 1987-1991 (ha) | Total (ha) |
|--------------------------|----------------|----------------|----------------|------------|
| Styrax tonkinensis | 21,000 | 9,600 | 14,100 | 44,700 |
| Mangletia glauca | 4,900 | 11,000 | 2,200 | 18,100 |
| Pine, mainly P. caribaea | 700 | 3,800 | 1,700 | 6,200 |
| Eucalyptus camaldulensis | 300 | 3,000 | 4,600 | 7,900 |
| Eucalyptus urophylla | | | 4,600 | 4,600 |
| Acacia mangium | | | 3,600 | 3,600 |
| Sum | 26,900 | 27,400 | 30,800 | 85,100 |

FROM AID FIASCO TO...

... success story

AGNETA SUNDGREN, SWEDISH INTERNATIONAL DEVELOPMENT COOPERATION AGENCY (SIDA)

SEK 770 million were allocated to the Bai Bang paper mill, which will go down in history as Sweden's most lambasted aid project.

The scope of the project was changed and the building was heavily delayed. At the inauguration in 1982, production was still not up to the mill's rated capacity of 55,000 tonnes. In addition the project had become far more costly than was projected, and the bill finally amounted to SEK 2.8 billion.

THE COST ESCALATION was due to the sub-projects that came about later; environmental investments, a river transport project and forestry support for the wood supply. A school for advanced vocational training was established and a housing estate was constructed. Furthermore, Sweden was forced to contribute to com-

prehensive operating aid. What had been just a mill now became a regional rural development project. But the criticism in Sweden was harsh. The massive cost overruns and delays led to a fierce debate.

It was not long before reports emerged of abuses such as forced labour and poor working conditions for women. The problems were dealt with and by 1996 Bai Bang was finally operating at full capacity. By then the mill had been entirely in the hands of the Vietnamese for six years. Just over a decade later, in 2008, production had doubled to 110,000 tonnes. At the turn of the millennium, the criticism had finally subsided. The turning point came after an evaluation, in which the project was described as successful. The judgement began to change from that of a resource-intensive scandal project to an example of a successful aid project.

After the end of the French war in 1954, the areas today supplying wood to Bai Bang were basically a natural forest with a small population, mainly engaged in shifting cultivation. There was a balance between the population and the forest and the rotation was long enough to enable the forest land to recover. The population mainly consisted of ethnic minorities.



Photo: Bo Ohlsson.

LANDSCAPING

From natural forest to farm-based plantation forestry in 30 years

Bo Ohlsson, SLU/Independent consultant

Land degradation

Former soldiers and delta inhabitants began to migrate to the forest areas, driven by government policies, starting up collective pastoral and arable farms and State Forest Enterprises. The population increased, the shifting cultivation cycle became shorter, and deforestation and forest land degradation followed. The stored energy and resources of the forest and forest land were converted into food production and cash for the loggers. A period of chaos ensued, and there were no legal instruments or institutions which could properly address this situation.

Reorganization

Eventually, during this period of exploitation, a development in terms of possible policy and legal instruments started – a reorganization! Over a 25 year period from around 1990, some 200 Decrees were issued, and were continuously adjusted and eventually resulted in the Law on Forest Protection and Development, in 2005. During this period, new institutions emerged – new policies and legislation, the Doi Moi – free market economy, land use tenure, in effect privatization of usufruct

rights and a free market for wood. Coupled with the local population's experience of Bai Bang plantations, availability of forest land – degraded and in poor condition – and a confirmed market for wood, this resulted in a dramatic increase in private, mainly farm-based forest plantations. In Doan Hung District, forest cover over a 20 year period increased from 20 to 40 per cent.

Institution building

The landscape and the formerly denuded hills are covered with small plantations, mainly less than 1 ha, with varying composition – from agroforestry to monoculture, probably related to the owners' objectives. The sustainability of this mosaic system remains to be seen, but today, the farm-based plantation forestry delivers some 400,000 tonnes/a of wood to the Bai Bang mill and other consumers. For the owners, this appears to be a reasonably good income, but it probably required some initial resources to start up, and it is probably difficult for the poorest strata to benefit directly from the system.

Swedish influence behind gigantic landscape transition

For many years Sweden was the biggest external donor to Vietnam's forest sector and is seen as a trusted partner.

MATS SANDEWALL, DEPTARTMENT OF FOREST RESOURCE MANAGEMENT, SWEDISH UNIVERSITY OF AGRICULTURAL SCIENCES

Sweden seems to have influenced the Vietnamese forest sector in many ways, e.g. technically, in silviculture, forest policy and as an institutional model. Around 1990, by the completion of the Bai Bang project, the previous deforestation trend was reversed through political reforms in land tenure, market economy and large scale reforestation programs. In the following 20 years the national forest cover increased by 4.4 million ha from 30 to 43 per cent (FAO, 2011). Most of this transition was caused by the conversion of low-density secondary natural forest or degraded land into planted forests of fast-growing exotic trees, mainly acacia and pine. Behind the change lay intensified agriculture and demographic changes.

The fibre market is uncertain

For a Swedish forester the Vietnamese development is impressive but it also leads to second thoughts. There has so far been a strong government focus on increasing forest cover, but little consideration of "what for?" The situation has now changed dramatically but there is a lack of consensus and strategy on how the resources should be managed and used. An economic concern is the massive trend of state sponsored forest plantation in areas with limited demand. Forest farmers plant exotic trees as cash crops (they cannot afford to operate for longer without cash return on their investment). The fibre market is uncertain in those areas. There are other important uses (e.g. resin) but many farmers do not earn what they expect or need from their forests.

How to meet future needs?

From an ecological point of view, the continuous loss of biodiversity during depletion of natural forests and later conversion into monoculture plantations on a large scale raises some concerns. Many planted stands and holdings are small and diverse but the total area cover is large. The yield is also very low for those farmers, because of a lack of technical know-how and capital to invest. What is the way forward for them? How can they increase pro-

duction sustainably without further loss of biodiversity? We may draw parallels to current global trends but also to the historical development in Sweden. Do we have "experience" to contribute or are we the ones to learn?



Bai Bang. Photos: Bo Ohlsson & Mats Sandewall.



Large forest industry ventures require public acceptance

One lesson from Vietnam is clear: any large forest industry venture requires public acceptance and involvement, particularly where other land use options are at hand.

JAN-ERIK NYLUND, DEPTARTMENT OF FOREST PRODUCTS, SWEDISH UNIVERSITY OF AGRICULTURAL SCIENCES

The Vietnam experience is not easy to transpose to South America for example, because the scale of the industry and thereby the plantation is an order of magnitude larger. On the other hand these large-scale projects have severe challenges to solve if these investments are to be seen as an attractive alternative. Land use and land acquisition for a milliontonne mill in China have consequently proven to be tricky; it is even harder to see the original land users managing the plantations up to the standard required.

Developments in South America

The industrial forestry models of the 1970s were based on state or company-managed plantations. Brazilian companies did not want more than 10–15 per cent to come from external growers to secure the supply line. Also, they handled management from soil preparation to harvest. The rapid expansion of ITP is forcing a policy change, as land prices are becoming unaffordable. Also, active participation of local growers would enhance the legitimacy of forestry. A drawback to landowners has been

and continues to be the specialization on pulpwood; they have hardly had any options other than selling to the mills.

As a contrast, forestry development in Chile has entailed a broader spectrum of sawmill, panel and pulp industries, and also involved a wider range of producers. This has ensured better public acceptance of forestry. However, smaller growers have rapidly started to lag behind in the regeneration of industrial plantations. The effects have yet to be seen.

Photo: SSC-Forestry, Sweden



Bai Bang paved the way for further co-operation

Bai Bang is now a highly productive paper mill that has played a major part in raising living standards in the region.

Agneta Sundgren, Sida

The Vietnamese have learned from the Swedes modern management techniques such as the role of competition, marketing, cost efficiency, quality and profit. Over the years, thousands of Swedes have lived and worked at the mill. They were accommodated in a camp in a village known among the Swedes as Vietboda, which had a swimming pool, tennis court, school, general store, and library. By now most of it has been demolished, but a hotel has been built, and the swimming pool and tennis

court still remain. Although the project has been costly a great deal of money has been repatriated to Sweden. Numerous Swedish firms have been engaged over the years, and many millions of Swedish kronor have been returned to Sweden.

Raised millions of Vietnamese out of poverty

In 2012 Swedish aid to Vietnam was evaluated. It is estimated that it has raised millions of Vietnamese out of poverty. Bai Bang is appreciated today because the project, as a result of the special ties of friendship that have grown, has paved the way for further co-operation and support for Doi Moi, Vietnam's transition to a market economy. In Vietnamese eyes Bai Bang has never been anything but an outstanding success, and Sweden is thanked on every possible occasion. Bai Bang is perhaps the best example of how an aid project can be reassessed in pace with changing times.

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Current experiences and policy perspectives

NGHIA DAI TRAN.

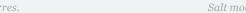
Institute of Policy and Strategy in Agriculture and Rural Development (IPSARD) in Vietnam

The results from research carried out by a joint group of researchers from ISDP, Lund University, and IPSARD indicate, among other things, that:

- The entitlement of the forestland use rights certification has reduced deforestation of protection forests but not that of production forestland.
- The duration of forestland tenure has no significant effect on enhancing forest behaviours of households.
- While the area of forestland a household uses for industrial crops/aquaculture production has a significantly positive influence to average annual income/ha, the areas of plantation forest and natural protection forest have a negative influence.
- The return from forest plantation is such that it cannot cover all forest production costs creating disincentives for private enterprises and households to invest in forest development and sustainable forest management.
- The current institutional framework only allocates production forest to households for a period of maximum 50 years. However, the life cycle of forest is relatively long and therefore needs long-term investment. Our study showed that the defacto duration of production forest increases households' credit accessibility. This means that if the dejure institutions extend the duration of production forestland rights, it could provide more resources (i.e., forestland as collateral) and incentives for households toward forest investment and development.

The full results of the study will be published in a forthcoming paper.









Ruong-rung.

Institutional partnership for improving forecast capacity

Biörn Merkell, Swedish Forest Agency/SIFI

SLU and the Swedish Forest Agency in collaboration with Vietnamese partners (VNFOREST, Forest Inventory and Planning Institute and Vietnam Forestry University) are from July 2012 to October 2013 undertaking a project to improve the forecasting capacity in Vietnam's forestry sector.

The project is a partner-driven cooperation model with support from Sida. The main purpose is to develop a platform for a future forecasting model for the forestry sector in Vietnam. The co-operation consists of four main components:

- 1. Defining of a national level database for supporting forestry sector forecasting.
- 2. Developing institutional and human capacity in the field of forecasting.
- **3.** Developing a pilot forecasting model for plantation forestry.
- **4.** Research component for pilot studies established on test site.



Lessons from Bai Bai Bang

REIDAR PERSSON, SWEDISH UNIVERSITY OF AGRICULTURAL SCIENCES/SIFI

Photo: Bo Ohlsson.

Many large biomass plantations run into social problems, but Bai Bang seems to be an exception. Why? One reason is certainly that a market for wood was established around Bai Bang. There are many examples to show that when a market is established farmers can start to produce wood on their own initiative. In the case of Bai Bang the first plantations were established by state forest companies and co-operatives but after the economic reforms in the mid-1980s farmers started to produce trees as a commercial crop. The farmers adjusted the original intensive method so that it suited their conditions. Sometimes a good market can lead to over-investment that can give problems, but so far this seems not to have occurred around Bai Bang.

THE SECOND STRONG REASON is co-operation with the local population. If large biomass plantations are to suc-

ceed it is important that most of the local population benefit in some way from the plantations. It can be employment or opportunities to sell products. If this is the case the population can accept certain negative effects such as changes in the landscape. If the local population is not satisfied with changes this can cause a number of problems.

THE TENURE REFORMS and the market reforms in the 1980s were certainly important to create an interest for establishing plantations. It was evidently also possible for farmers to utilize the land in the way they found best. There were not a lot of detailed rules about how they should utilize the land. Another important factor was that enough food was being produced so there was no competition between the production of food and fibre.



EVEN IF MUCH SEEMS POSITIVE

around Bai Bang there are many things we do not know. Is everyone satisfied with what has happened or have vulnerable groups experienced hardship? How important is it that Vietnam is a strong state. The "success-stories" of Vietnam, China, Japan and South Korea have certain things in common. So some of the lessons can be difficult to use (or be influenced by) in many other countries. From other parts of Vietnam there are reports of land conflicts. Will the situation also change around Bai Bang when the value of land increases further?

Photo: Mats Sandewall.

Calendar 2013





April

| 3–5 April | INC 3, LBA through Forest Europe | INC S:t Petersburg, Russia |
|------------|---|-------------------------------|
| 9–19 April | United Nations Forum on Forests (UNFF) 10 | UNFF Istanbul, Turkey |
| 24 April | Roundtable discussion about policy in Vietnam | ISDP Stockholm, Sweden |

May

| 12–15 May | Institutions and Markets for Ecosystem Services in Green Economy | IUFRO Hangzhou, China |
|-----------|--|---------------------------|
| 23 May | Development talks – focus on investment in sustainable land use | Sida Stockholm, Sweden |

June

| 3 June | Experiences from Bai Bang with global reflections | KSLA/SIFI Stockholm, Sweden |
|------------|---|--------------------------------|
| 10–14 June | Fourth Session of the Intergovernmental Negotiating Committee (INC 4) | INC Warsaw, Poland |
| 12–15 June | Third IUFRO Latin American Congress | IUFRO San José, Costa Rica |

More activities at www.sifi.se/kalendarium.

Spring activities at SIFI

SIFI's activities during the spring have targeted 10 June in Costa Rica, when the Swedish bid submitted by SLU for the IUFRO World Congress 2019 will be presented. The Swedish bid has been selected for further consideration together with a tri-national bid submitted by Germany and a bid from Brazil. Representatives of the IUFRO Management Committee have already visited Stockholm on 27 March. The stakeholders could proudly present our beautiful capital, the venues and the suggested organization of the congress coordinated by SIFI.

"Experiences from Bai Bang with global reflections" is the title of our next **seminar on 3 June at KSLA**. Vietnamese and Swedish experiences will be presented as well as global reflections before an open floor discussion is called. You can access the programme and the registration form at www.sifi.se.

Since the start of the Secretariat in 2010, SIFI has met the goals for phase I with its current capacity. The vision has been to increase the number of employees for phase II, starting from the third quarter, with the aim of becoming a stronger player on the national as well as the international arena. To date we have **not received the support** from the private forest industries and owners as required by the government as a prerequisite for the continued existence of the think tank.

Please visit our website for more information about the seminars or to subscribe to the newsletter. Our goal is that the newsletter, along with the website, should be a forum for discussing developments in the Swedish forest sector, in the spirit of the academy. Finally SIFI would like to express a sincere thanks Second Secretary Francisco Ulloa for a fruitful collaboration during his posting at the Embassy of Chile in Sweden.









Our financiers:

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 $\textbf{Landsbygdsdepartemente1} \quad \textit{Swedish Ministry of Rural Affairs}$

ABOUT SIFI

The Secretariat for International Forestry Issues (SIFI) consists of a committee (KIS) and a supporting office. The Royal Swedish Academy for Agriculture and Forestry (KSLA) is hosting SIFI. Steering group for the work is KIS and in addition there is a function for resource base development with representatives from different parts of the Swedish forest sector.

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